

Meeting Matrix

Meeting	Contract	Mortgage	Selections 1	Selections 2
Purposes				
Scheduling				
1. Trigger(s)				
2. Location				
3. Attendees				
4. Appointment set up by				
5. Available days and times for appointments				
6. Minimum notice for buyers				
7. Typical duration				
8. Key points to mention in setting up appointment				
9. Details in Home Owner Guide—page				
10. Confirming letter?				
Preparation				
11. Attach appropriate agenda				
12. Review file				
13. Confer with colleagues				
14. Standard items	Agenda Buyer's file Home Owner Guide Business cards	Agenda Buyer's file Home Owner Guide Business cards	Agenda Buyer's file Home Owner Guide Business cards	Agenda Buyer's file Home Owner Guide Business cards
15. Items particular to this meeting				
Conduct				
16. Personnel introduction				
17. Meeting introduction				
18. Positive comments for opening				
19. Responses to controversial issues				
20. Proactive touches: What memory points have you planned to surprise the home buyers?				
21. Positive comments for conclusions				
22. Conclusion: Key points about next meeting, Home Owner Guide page reference; questions in the meantime				
Follow up				
23. Follow-up letter?				
24. Confirmation of resolved issue(s)				

