

A Sampling From The ‘Going Deeper’ Webinar Series

Over the next couple of pages, we will share one segment of one of the ‘Going Deeper’ webinars that are offered after the in-class program. These live ‘Going Deeper’ webinars do exactly that – go deeper into the psychology of working with seniors and their families, to ensure a more satisfying process for all parties. Doing so then strengthens the relationship between REALTOR® and client and increases the referral rate (‘Getting Referrals From Senior Clients – It’s Different’ is covered in a separate webinar).

These webinars are not a required part of the program, however, they are extremely popular with between 70 and 100 people registering for each.

This particular segment deals with the basic, yet critical, difference between working with senior clientele and non-senior clientele. Failing to understand and respect the difference is often the make or break between gaining the client or not.

There are two approaches towards a move; one is **Transactional** and the other is **Transitional**.

The **Transactional** approach is where the focus is on the mechanics, systems and Provincial mandate required for the move. The interview process is all about why the agent is the best for the job.

The **Transitional** approach requires the focus to be on the underlying factors that are driving the consideration of a change, knowing that a move may not be the best thing for the client.

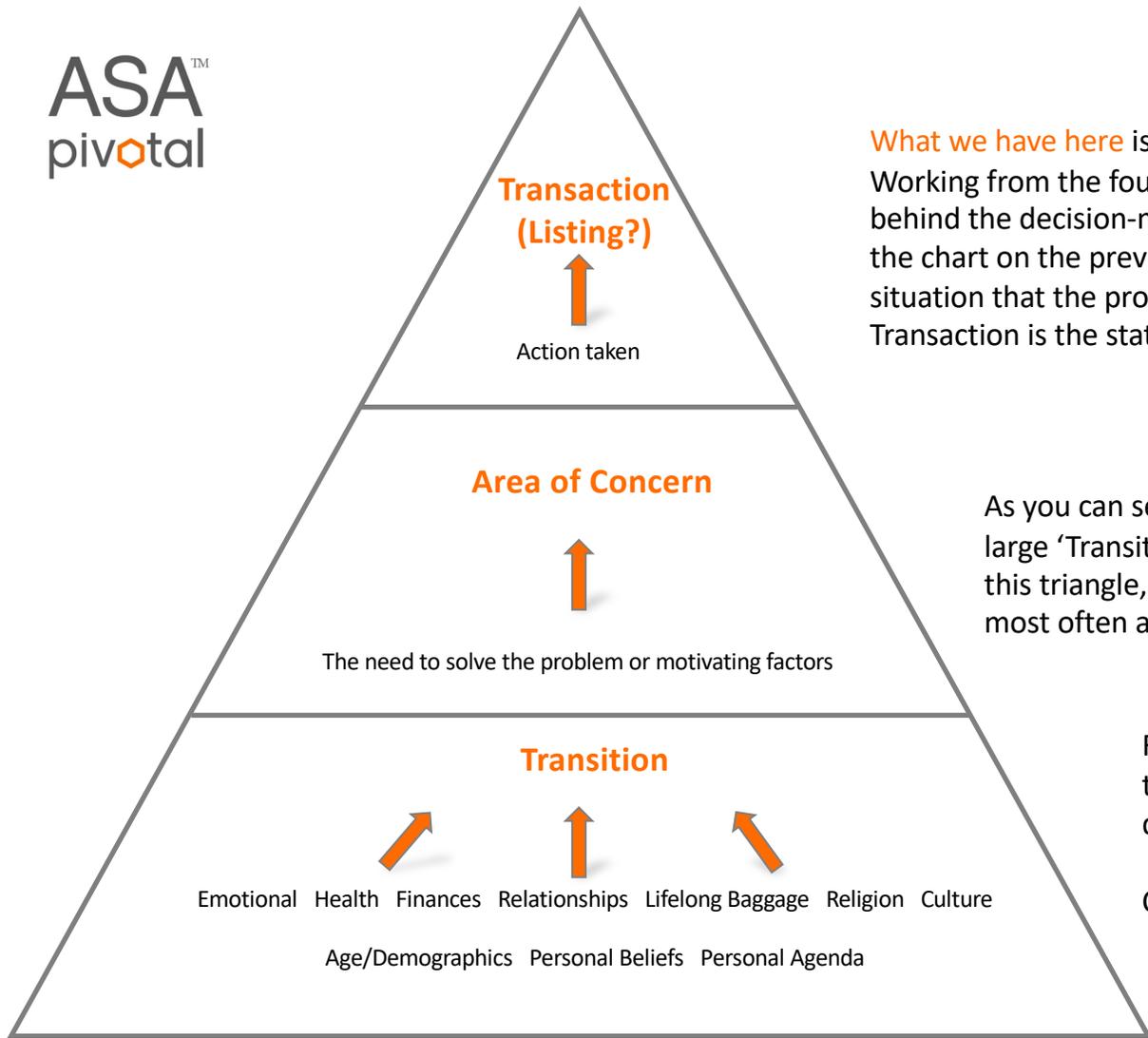
See the chart on the next page . . .



TRANSITIONAL VS TRANSACTIONAL

- Emotional
 - Health
 - Finances
 - Relationships
 - Lifelong Baggage
 - Religion
 - Culture
 - Age/Demographics
 - Personal Beliefs
 - Personal Agenda
- Real Estate or Service Presentation
 - Property Preparation
 - CMA
 - Listing submission
 - Photos
 - Marketing
 - Showings/Open Houses
 - Negotiating
 - Closing
 - Commission

The Transaction is the action based on the needs of the Transition.
Discovering the Transition WHY leads to the Transaction NEED.

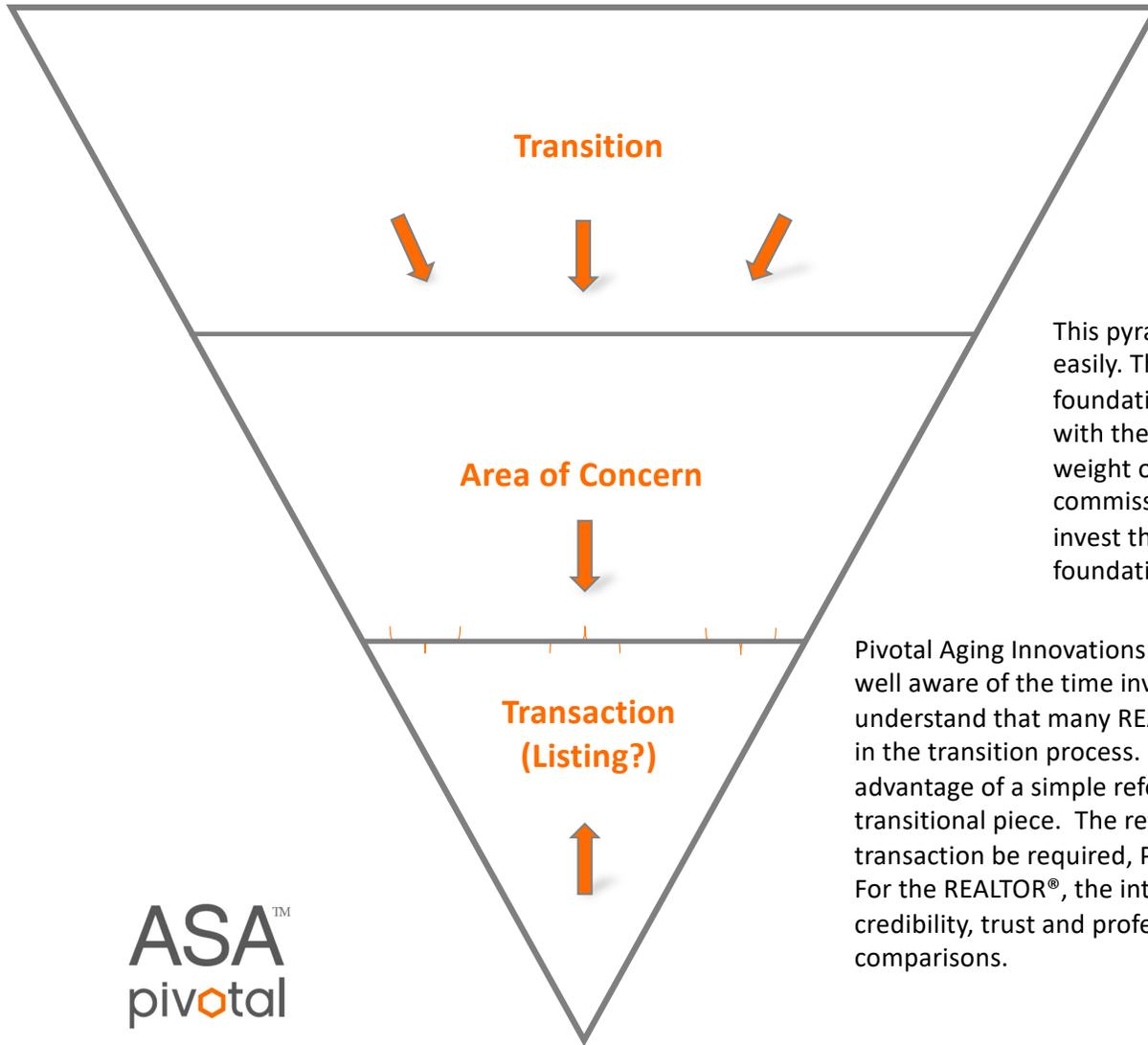


What we have here is the strongest structure possible, the pyramid. Working from the foundation up, the Transition is the emotional force behind the decision-making process, made up of all the pieces listed in the chart on the previous page. The Area of Concern is the specific situation that the prospective client finds themselves in, and the Transaction is the statement of the action that will be taken.

As you can see, the pyramid is a very stable structure, given it's large 'Transition' base. We will show you on the next slide how this triangle, due to the nature of the real estate business, is most often aligned.

Failing to build a solid, Transition-based foundation to this pyramid most commonly leads to dissatisfaction and tumultuous transitions.

Contrast this to the pyramid on the next page . . .



Here we have the pyramid as it shows up in the approach of most REALTORS®. Indeed, our competitor states “Students learn to stay focused on the transaction and avoid inappropriate involvement in family matters”. The experiences of thousands of senior transitions shows us this is not well supported for any of the parties involved.

This pyramid, as you can see, is very unstable and can be tipped over easily. The ‘Transaction (Listing?)’ has taken it’s place as the foundation behind the appointment, and the senior consumer, along with their family, typically sees that in a negative light. Giving the weight of the process to the Transaction leaves one wide open to commission-based comparisons to all other REALTORS®. Far better to invest the time and energy in building a strong ‘Transition’ foundation, and move towards the transaction.

Pivotal Aging Innovations takes this one step further, with it’s Consulting Service. We are well aware of the time involved in moving a Senior through a Transition, and we understand that many REALTOR’S® do not wish to spend that time or are uncomfortable in the transition process. REALTORS® are finally able to manage this by taking advantage of a simple referral to the Pivotal Consulting program to handle the transitional piece. The referring process establishes certainty that should a real estate transaction be required, Pivotal will return your client to you, ready for your services. For the REALTOR®, the introduction of the Pivotal Consulting Service empowers credibility, trust and professionalism while reducing the focus on commission-based comparisons.