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## Equal Services Checklist

- Develop policies or procedures concerning treatment of prospects and clients during their initial contact with your firm.**

For example:

- Hospitality (greeting, refreshments, etc.)
- Explaining the services offered by your firm relative to their needs
- Obtaining initial prospect information (name, address, phone number)
- Assignment to agents
- Explaining your commitment to fair housing laws
- Keeping records of these contacts
- Follow-up

- Obtain objective information regarding the prospect's or customer's needs and wants.**

For example:

- Identify objective needs, such as price, size, features, and location.
- Respond to subjective requests in such a way to elicit objective criteria.
- Determine whether the customer knows what they are financially qualified to buy.

- Let the customer set the limits in the housing search.**

- Provide prospective buyers and renters with complete and accurate information on the availability of housing, alternative methods of financing, and other facts affecting the choice of location (such as schools, employment or transportation).
- Allow the prospect to make the choices: 1. Features in a house or apartment 2. Price 3. Financing options 4. Communities or areas

- Offer a variety of choices:**

- In financing options
- In location
- In types/styles of houses

- Require good recordkeeping for all prospects and inquiries:**

- Housing requested
- Housing options and alternatives offered
- Service provided

- Establish a method of monitoring contacts and evaluating service being provided.**