



Guide 2 | Build Your Personalized Client Experience

Turn the way you work into a consistent client experience you can repeat.

Build Your Four Seasons Way of Doing Business

A great client experience feels personal, but the quality of the experience should not depend on you remembering every detail every time.

The goal is to take the best version of how you serve a client and turn it into a repeatable system.

Action

Choose one client or relationship type to build first:

- New Lead
- Open House Lead
- Buyer
- Seller
- Past Client / Just Closed

Start with the one that would improve your business the most today.

Business Benefit

You create a client experience you can deliver intentionally and consistently instead of rebuilding it from memory every time.

Use Action Plans to Make the Experience Repeatable

Action Plans help organize the follow-up, communication, reminders, and tasks that should happen for a specific type of client or relationship.

Home includes pre-built Action Plans you can use and edit. To find them, go to **Contacts**, click **Actions** in the top right, then **Action Plan**.

For Catapult, start with the pre-built Action Plans and edit them around how you work and how you want your clients to experience working with you.

Your Standard

Automate the Repeatable

Create Tasks for the Personal

Automate When

The step should happen consistently and does not require your personal judgment.

Examples:

- A complete email that can be sent as written
- A reminder or notification
- Adding or changing a Group
- Adding or removing a Tag

Create a Personal Task When

Your relationship, judgment, advice, or voice is what creates the value.

Examples:

- Call the client
- Send a personal text
- Write a handwritten note
- Discuss strategy
- Give advice

- Follow up on something specific they told you
- Recognize an important milestone

Action

As you review your plan, decide which steps should be automated and which should remain personal.

Business Benefit

You save time on repeatable steps while protecting the personal moments that make your client experience valuable.

Part 2

How to Build Any of Your Core 5 Action Plans

1. Think It Through

Answer based on how you actually work and how you want the client experience to feel.

Think through:

- Who the plan is for
- The goal of the plan
- What should happen immediately
- What should happen over the next few days, weeks, or months
- Which touchpoints should be personal
- Which touchpoints can be repeatable
- Which reminders would help
- Whether any Groups, Tags, or Statuses should change
- When the plan should stop or pause
- What should happen when the person responds

2. Review Your Plan

Ask:

- Does this reflect how I want to serve this client?
- What should be automated?

- What should remain personal?
- Is anything unnecessary?
- Is anything important missing?
- Will I actually complete the personal tasks when they appear?

3. Review Automated Communications

Only automate messages that are complete, accurate, and appropriate to send without additional client-specific information.

4. Build the Plan in Home

Go into Action Plans and build your plan.

5. Put It to Work

Use the plan with an appropriate real relationship.

Pay attention to what worked, what felt unnecessary, what should happen sooner or later, and what you would improve.

Then update the plan.

Business Benefit

You create one personalized client experience you can actually use, improve, and repeat.

Part 3

Your Core 5 Action Plans

You do not need to build all five at once.

Build one. Use it. Improve it. Then move to the next.

The examples below are thought starters. Your answers should determine what belongs in your customized plan.

1. New Lead

Purpose

Create a consistent experience from the moment a new opportunity comes in.

Think About

- How quickly should you personally respond?
- What information do you need to learn?
- What should happen if you do not connect?
- What useful information do you consistently provide?
- When does the person become an active client?
- When should follow-up stop or change?

Business Benefit

Every new opportunity receives consistent follow-up without depending on memory.

2. Open House Lead

Purpose

Continue the relationship after the open house and create a relevant next conversation.

Think About

- What should happen after the open house?
- What needs to be personal based on the conversation you had?
- What property or market information could be useful?
- What should happen if they are already represented?
- What next step would indicate real interest?
- When should follow-up stop or change?

Business Benefit

The relationship continues after the open house instead of ending at the sign-in sheet.

3. Buyer

Purpose

Give every buyer a clear, organized start to the relationship.

Think About

- What should happen after the first serious buyer conversation?
- What information do you need to learn?
- What preparation or education do you consistently provide?
- Which moments require your personal advice?
- What should happen before and after the buyer consultation?
- When do you consider them an active buyer client?

Business Benefit

Every buyer receives a consistent experience even when your business gets busy.

4. Seller

Purpose

Give every seller opportunity a clear path from initial interest to the next decision.

Think About

- What should happen after someone expresses seller interest?
- What do you need to learn about their timing, goals, or conditions?
- When would you provide an Equity Analysis?
- What preparation happens before the consultation?
- What information do you consistently provide?
- What follow-up should happen afterward?
- When should the plan change or stop?

Business Benefit

Seller opportunities receive consistent follow-up and always have a clear next step.

5. Past Client / Just Closed

Purpose

Turn the end of a transaction into the beginning of the long-term relationship.

Think About

- What should happen immediately after closing?
- How do you want to thank the client?
- When do you want to check in?
- Which milestones do you want to recognize?
- How will you handle the home anniversary?
- When might you offer a future Equity Analysis or market conversation?
- What personal touchpoints matter most to you?

Business Benefit

The relationship continues beyond the transaction and supports repeat and referral business.

Part 4

Build Your First Action Plan

Choose one:

- ☐ New Lead
- ☐ Open House Lead
- ☐ Buyer
- ☐ Seller
- ☐ Past Client / Just Closed

Then:

- ☐ Think through the questions in step 1
- ☐ Review your plan
- ☐ Decide what should be automated and what should remain personal
- ☐ Review every automated communication
- ☐ Go into Action Plans and build the plan

- ☐ Use it with a real relationship
- ☐ Improve the plan as you learn what works

Your Standard

Automate the Repeatable

Create Tasks for the Personal

Build one → Use it → Improve it → Build the next

The goal is a consistent client experience that still feels personal to the person receiving it.

H I O M E



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