

# Mystery Shop Me! **PLUS**

Compare your first contact activities  
and feescales to your competitors

Prepared for  
Feb 2024



**Bedder Conveyancing**  
more than just referrals





# Your 'Mystery Shop Me!' PLUS report



*Thank you for your order!*

*We have called literally hundreds of conveyancing firms requesting quotes and now have thousands of data points from those calls. We have been quite surprised how flawed many firms processes are BUT how easily and how dramatically they can be improved.*

*By measuring your performance on a regular basis you will be able to monitor key performance indicators to win more clients and consistently provide a service that you can be proud of.*

*Please get in touch to discuss the findings of our report, we look forward to working with you.*





Dan Hamilton-Charlton



Mike Stainsby



Dan has been involved in property since the early 1990's and has always been passionate about helping people to have a better experience of moving home. In 2008 he spent 6 years as a property consultant and business development manager for a national asset management business and panel manager where he got much closer to the legal community.

He was asked to create a Private Client fulfilment network for a well-known high street bank and in doing so, better understood the frustrations of the conveyancing teams within those firms. His interest and passion turned toward empowering and supporting conveyancers.

Dan helped with the development and delivery of business engagement technologies and provided business development and consultancy services to conveyancers across England and Wales to help firms control their own destinies.

He has a proven track record of helping firms increase their profit margins, attract new and profitable sources of work, helping teams to better engage with and convert new business opportunities as well as offering first hand support.

Mike has spent almost 25 years in the property sector starting as an estate agent in the mid 1980's even before mobile phones existed! He helped launch HIP's to a less than enthusiastic audience and commenced training as a DEA before moving into a National role with an Estate agency affinity group.

Mike then took on business development roles with National search groups focusing entirely on improving relationships with Law firms and the alliances Law Firms have with their introducers.

The foundation for all business development activities has been data and benchmarking. With their combined experiences, Mike and Dan have collaborated to deliver Conveyancer Insights to provide the information that a conveyancing practice needs to know, and the subsequent changes required to develop and grow.

The team at Conveyancer Insights pose as buyers to glean information from estate agents about their conveyancing relationships as well as mystery shopping conveyancers via telephone and, where available, web chat or form, to see how they engage with new prospects. They experience first-hand how they were made to feel, whether they were listened to, if they were made to feel valued and whether they received any written breakdown of costs. Everything is scored within strict parameters to ensure consistency between all firms.

Most importantly, did anyone ask for the business?

# Mystery Shop Me! PLUS - Contents

## A review of your customer handling and new client onboarding processes

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# Customer call Handling

## Call Handling - performance measurement

- |  |        |         |
|--|--------|---------|
| 1. Answered phone promptly, ideally within 5 rings?                | YES/NO | 1 Point |
| 2. Professional Introduction?                                      | YES/NO | 1 Point |
| 3. Name offered?   | YES/NO | 1 Point |
| 4. Explanation of what happens next, before transferring the call? | YES/NO | 1 Point |
| 5. Rapport with customer / friendly interaction?                   | YES/NO | 1 Point |

Total call handling score 1-5 Score 1-3 = Poor. 4 = OK. 5 = Good

Your prospective customer's experience when dealing with you over the phone is critical to their decision to buy from you.

Those initial minutes of contact are probably the single biggest influence on whether you are going to win that piece of conveyancing business or not. So your frontline team doesn't just have to be good, they have to be better than the competition.

The mystery shopping exercise carried out provides you with a benchmark of your own performance and, critically, how you compare against your competitors who are talking to the very same potential customers.

**89% of consumers are more likely to buy after a positive customer service experience.**

*Salesforce Research*

To lose a prospect who has pro-actively contacted your business is a waste. They will have gone through a number of stages to get to you and they are actively looking to buy. So effort invested in converting them by providing excellent customer service will always be time and money well spent.

**93% of customers are more likely to make repeat purchases with companies that offer excellent customer service.**

*HubSpot Research.*

It is more than about just instilling a clear customer handling process, though that's a useful starting point, it's about instilling a culture across the whole team that customer service really matters and that every in-bound query is a potential new matter to be won. Specialist customer service training bespoke to your industry is often the kick-off for successfully transforming your results and conversion success.

# Your call-handling results

## Your Score

# 4

Our call was answered promptly (in 3 rings) and professionally by Lisa who explained that she would transfer us to Matthew in the Conveyancing department straight away. The call handling was polite and business-like. It could only have been improved by personalising the greeting or asking how the caller was today before attempting to transfer.

## Initial Call Handling

- |                                     |     |
|-------------------------------------|-----|
| 1. Call answered promptly           | YES |
| 2. Professional Introduction        | YES |
| 3. Name offered                     | YES |
| 4. Explanation of what happens next | YES |
| 5. Rapport with customer            | NO  |



# Information gathering

## Information gathering - performance measurement

- 1. Name offered and introductory preamble prior to beginning quote? YES/NO **1 Point**
- 2. Quote explained and offered verbally whilst on the call? YES/NO **1 Point**
- 3. Was there any small talk or rapport building during the conversation? YES/NO **1 Point**
- 4. Explanation of what happens next, before transferring the call? YES/NO **1 Point**
- 5. Any attempt made to convert or ask for the business immediately? YES/NO **1 Point**

Total call handling score 1-5 Score 1-3 = Poor. 4 = OK. 5 = Good

Obtaining the right information from your prospective customer can be the difference between winning and losing their business. Wrong or incomplete information can lead to missing the opportunity to quote or providing a quote that is incomplete or inaccurate. A quote provided quickly signifies the service you offer is of equal quality. But it is surprising how often this obvious step is handled badly.

*"Get close to your customers. So close that you tell them what they need well before they realize it themselves."*

Steve Jobs

*"Lead generation excels when a campaign looks to capture customer intelligence."*

Salesforce

A simple checklist of essential information required to provide an accurate quote is a simple way to ensure front line staff collect and qualify the right information every time. Better information = better quotes = more business.

# Your information gathering results

## Your Score

# 2

Matthew picked up the call and introduced himself and quickly asked if we were buying, selling, or both with no preamble. He asked if we were first-time buyers but made no attempt to establish any other information. He didn't offer to go through the figures with us or enter into any small talk, the call was over very quickly. No attempt to close the deal was made only a nod to it via asking to 'come back to me if we wanted to go ahead'.

## Information gathering

- 1. Name offered? **YES**
- 2. Quote given over the phone? **NO**
- 3. Rapport / interest in client? **NO**
- 4. Explanation of next steps? **YES**
- 5. Asked for the business? **NO**

Score 1-3 = Poor. 4 = OK. 5 = Good.



## The Quote itself

### The Quote - performance measurement

- |   |        |         |
|---|--------|---------|
| 1. Was the quote received promptly or within a promised time frame? | YES/NO | 1 Point |
| 2. Was the quote visually appealing and easy to understand?         | YES/NO | 1 Point |
| 3. Was the quote correct with disbursements and fees easily seen?   | YES/NO | 1 Point |
| 4. Was there any other useful and relevant details attached?        | YES/NO | 1 Point |
| 5. Did the quote make it clear what to do next?                     | YES/NO | 1 Point |

Total call handling score 1-5 Score 1-3 = Poor. 4 = OK. 5 = Good

Many people see the actual quote (price) as the only factor in a prospect's decision-making process. To complicate matters, it is often the reason customers give when asked for their reasons for choosing a particular supplier. It's not true, it's just part of the mix.

The prospect receiving the quote will factor in their whole customer service experience, the accuracy of the quote, and how professional it looks, in their final decision.

***"Not following up with your prospects is the same as filling up your bathtub without first putting the plug in the hole."***

Michelle Moore – Selling Simplified

The time frame in which the quote is received is particularly critical. The customer is normally in buying mode when calling round for quotes. They will often go with the first company that provides them with a quality quote that's within their expectation range. Normally, that can be measured in hours rather than days.

***"Don't ever be afraid to follow up on a quote."***

Once the quote has been sent, a personal follow-up call is essential. Firstly, it allows you to check that your quote has been received and answers their needs. Secondly, it gives you the opportunity to ask for their business. Somewhere between 35% - 50% of prospects buy from the first provider to follow up with them.

## Your Quotation results

# Your Score

# 4

The quote was received very quickly, looked good, and was factually correct. The supporting PDF, however, was partially oriented wrongly and came from a 'no-reply' email and didn't mention the purchase address or your firm name so would be very hard to find at a later stage. There was no 'instruct us now' button and the letter had an odd dotted line surrounding it.

### The Quote

- |  |     |
|--|-----|
| 1. Quote received promptly via email?    | YES |
| 2. Quote easy to read and well laid out? | YES |
| 3. Quote apparently factually correct?   | YES |
| 4. Other useful information attached?    | YES |
| 5. Next steps present/easy to follow?    | NO  |

Score 1-3 = Poor. 4 = OK. 5 = Good.





## Review of your scores - Our Recommendations

Score

4

out of 5

### Call Handling Recommendations

This was much improved over our previous mystery shop call primarily because Lisa introduced and greeted us with the time of day, firm name, and herself (we called twice to make sure this wasn't a 'one-off'! It wasn't). This could only be improved by an attempt at personalising the call with an attempt to build rapport - how are you today? let me put you through. No deafening hold music was heard which was delightful!

Score

2

out of 5

### Information Gathering Recommendations

We found that the process was quite rushed and only the basics were covered to get enough information to provide a quote, with a clear desire to fill in the boxes! There was no offer to discuss the figures, 'a quote would be generated and sent by email' the call pretty much ended then. There was a golden opportunity to make a connection with the caller which was missed. As a buyer, I would not have any compulsion to go with THIS FIRM based on the discussion that I had with Matthew. Clients will see the service as fine but certainly not memorable.

Score

4

out of 5

### Your Quote Recommendations

The PDF attached looks good BUT one page was oriented wrong which spoils the effect, this needs addressing. We would recommend that you add an 'Instruct us NOW' button to make proceeding easier and investigate why the email has a dotted line around it which was visually unappealing. Better still the call handler should have agreed a time and date to call back.





# What did the quote and documents look like?

	NET	VAT	Total
<b>Fees</b>			
Legal Fees	£1,265.00	£253.00	£1,518.00
Electronic ID and Anti-Money Laundering Check	£15.00	£3.00	£18.00
<b>Disbursements</b>			
Land Registry Search	£3.00	£0.60	£3.60
Bank Transfer Handling Fee (£40 plus VAT per Transfer)	£40.00	£8.00	£48.00
Bankruptcy Search	£4.00	£0.80	£4.80
Searches	£252.00	£50.40	£302.40
<b>Government Charges</b>			
Stamp Duty	£22,700.00	£0.00	£22,700.00
Land Registry Fee	£150.00	£0.00	£150.00
<b>TOTAL</b>	<b>£24,429.00</b>	<b>£315.80</b>	<b>£24,744.80</b>

## Powers of Attorney, and Probate Services



experience and expertise to help.

so offer home visits for infirm clients who are not attend the office in person. All our lawyers are fully checked, so you can feel confident in asking us to attend at your home to discuss your matter.

many of our lawyers are STEP (Society of Trust and Estate Practitioners) qualified ensuring the highest standards of service are provided.



your matter.

## Residential Conveyancing

- Buying
- Selling
- Deeds
- Transfers
- Registrations
- Mortgages



✓ No unnecessary use of legal jargon

It was lovely to speak with you a few moments ago.

Please see attached our quotation with regards to your proposed purchase of 39 Juniper Grove.

I have done a conflict check and unfortunately we are already instructed at our Ripon branch by the vendors of this property. However, if you would like to instruct Eccles Heddon to act on your behalf, I can ask one of my colleagues in the Bedale or Thirsk branch to contact you.

If you have any queries please do not hesitate to contact me.

Kind regards

**Residential Conveyancing Services**

- Buying Property
- Selling Property
- Deeds of Gift
- Transfers of Equity
- Registration of Land
- Mortgages / Re-finance

**Our Promise**

- ✓ A dedicated lawyer will handle your matter
- ✓ Sensitive and discreet service
- ✓ Prompt and Efficient Service
- ✓ Fast Turnaround Times
- ✓ Tailored Advice
- ✓ Regular updates regarding your matter
- ✓ No unnecessary use of legal jargon

www.conveyancerinsights.co.uk





## Review of XXX Solicitors

Score

1

out of 5

### Call Handling

Our call was answered very quickly in just 1 ring but only with the Company name and no operator name was offered. The receptionist offered to take some details and then launched into 'are you buying, selling? Freehold/Leasehold, are you a first-time buyer' etc? There was no preamble or interest shown with a sign off that 'a solicitor will run a quote and send it out by email today' Very poor hence the low score!

Score

1

out of 5

### Information Gathering

The whole process was dealt with by reception, without transfer to a conveyancer or new business team.  
No rapport or interest was shown or any attempt to ask for the work. 1 point was awarded for explaining what would happen next!

Score

1

out of 5

### Quote

Our quote took about 3 hours to arrive by email it looked dreadful there were no attachments and it wasn't easy to take it up! One point was awarded for the quote being factually correct.  
A pretty dismal service!





## What did the quote and documents look like?



<b>PURCHASE PRICE</b>	<b>£440,000.00</b>
Legal Fees	£850.00
Leasehold Fee	£0.00
Help to Buy ISA Fee	£0.00
VAT	£170.00
Local Authority Search	£66.00
Drainage Search	£77.54
Environmental Search	£52.30
Planning Search	optional
Land Registry Fee	£150.00
Land Registry Submission Fee	£4.80
Bankruptcy Search	£2.00
Stamp Duty (higher rate)	£22,700.00
Stamp Duty Submission Fee	£6.00
Telegraphic Transfer Fee	£30.00
Final Search	£3.00
Contingency Fee	£20.00
Search Plan	£3.90
Electronic ID Check - £7.20 per name	£7.20
<b>Total</b>	<b>£24,142.74</b>





## Review of XXXXXX Solicitors

Score

2

out of 5

### Call Handling

Our call was answered quickly with a fairly professional introduction but the receptionist did not introduce herself. The hold message was deafening which we mentioned, she experienced some difficulty finding someone to deal with the enquiry.

Score

1

out of 5

### Information Gathering

Our call was dealt with by Karen (who didn't offer her name, we asked) launching straight into 'Are you buying, selling, or both?' Finishing with, 'I will send a quote in the next ten minutes' There was no attempt to ask for the business or even show a modicum of interest in our situation.

Score

2

out of 5

### Quote

The quote was quite basic with no supporting buying/selling guides BUT more importantly showed the wrong SDLT calculation.  
The quote was quarantined in my SPAM folder for some reason.





# What did the quote and documents look like?



£440,000

## YOUR PURCHASE FEES

Professional Charges	NET	VAT
Legal Fee	£1,200.00	£240.00
Telegraphic Transfer Fee	£35.00	£7.00
Archive Fee	£10.00	£2.00



**CITORS CHARGES TOTAL (inc VAT) £1,494.00**

You will also be liable for the following estimated disbursements and additional fees:

Third party disbursements	NET	VAT
Land Registry Fee (Electronic)	£150.00	£0.00
SDLT	£9,500.00	£0.00
Bankruptcy Searches (per person)	£2.00	£0.00
Land Registry Pre Completion Search	£3.00	£0.00
Search Pack	£300.00	£0.00
Lawyer Checker	£18.00	£3.60
LMS Lender Mortgage (if applicable)	£25.00	£5.00

**TOTAL (inc VAT) £11,500.60**



Thank you for allowing me to provide an estimate in respect of your proposed purchase, which is attached.

If you have any queries or wish to instruct us to act on your behalf please do not hesitate to contact me.

I look forward to hearing from you soon.

Kind regards,





## Review of XXXXXX Solicitors

Score

2

out of 5

### Call Handling

Our call was not answered quickly and the receptionist didn't introduce herself. Nobody was initially available to transfer us to and we started to leave our details. Peter became free and we started the conversation again repeating ourselves all over again which was rather tedious.

Score

2

out of 5

### Information Gathering

Peter introduced himself, just went through asking the standard questions, and closed with he would 'prepare a quote and send it by email later on'. No attempt to strike up any sort of conversation about my impending move or show any interest whatsoever in acting for me.

Score

2

out of 5

### Quote

The quote took about three hours to arrive with me and was a quite basic PDF attachment there was no supporting buying/selling guide which seemed very bland and quite 'old school'.





## What did the quote and documents look like?



Further to our conversation earlier this morning, please find attached our estimate for acting on your behalf in the purchase of the property in Ripon. The estimate includes all the anticipated costs and disbursements associated with your purchase including the stamp duty payment. Although we are not on the panel for Santander, we will be able to instruct another solicitor to deal with the mortgage at no additional cost to yourself. If you do have any queries please do not hesitate to contact me.

Kind regards

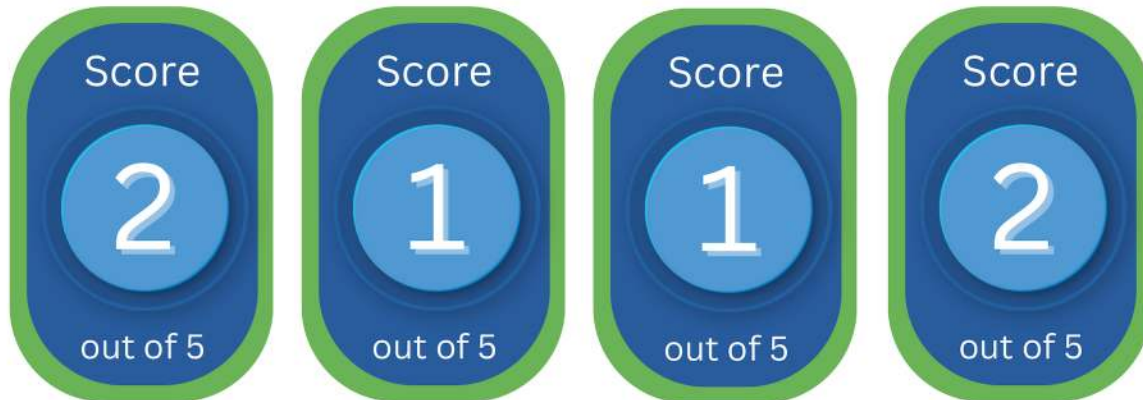
<b>Purchase Price</b>	£440,000	
	<b>FEE</b>	<b>VAT</b>
<b>LEGAL CHARGES</b>		
Our Fee	£1,500.00	£300.00
TT Fee	£17.00	£3.40
Leasehold Supplement	N/A	
Newbuild Supplement	N/A	
Shared Equity Supplement	N/A	
Unregistered Supplement	N/A	
Biometric ID & AML Check	£10.25	£2.05
Archiving Administration Fee	£65.00	£13.00
<b>DISBURSEMENTS</b>		
Search Pack *	£191.67	£38.34
Registration Fee	£150.00	
OS1 Priority Search	£3.00	£0.60
Bankruptcy Search	£2.00	£0.40
LMS Fee **	£25.00	£5.00
Stamp Duty Land Tax	£22,700.00	
<b>SUB TOTAL</b>	<b>£24,663.92</b>	<b>£362.79</b>
<b>TOTAL ESTIMATED CHARGES (Including VAT)</b>	<b>£25,026.71</b>	



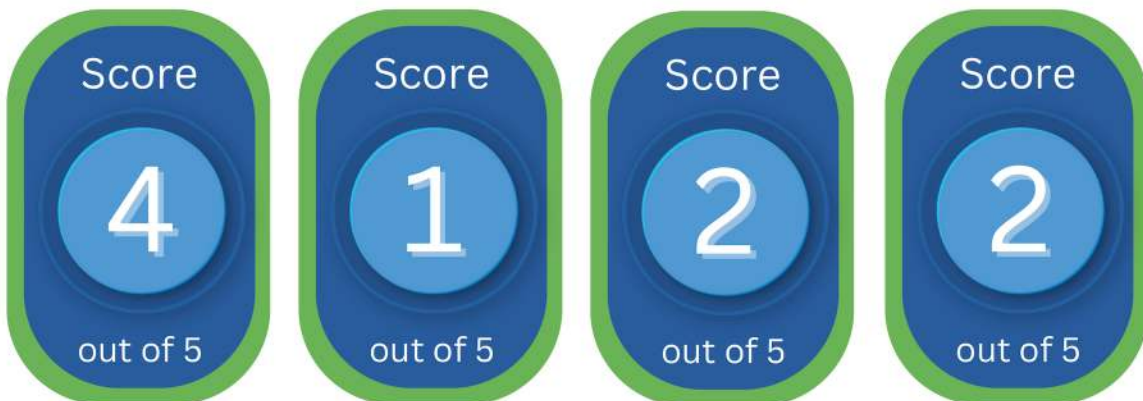
# Review of group scores - Our Comments



**Call Handling COMMENTS**  
Initial call handling should be the 'easy bit' but if done badly is often the beginning of a poor customer journey and that is true in this sample. It is hard to believe that receptionists are simply too busy to introduce themselves, their firm name, and the time of day bearing in mind that is their job description as 'Directors of First Impressions'.



**Information Gathering COMMENTS**  
All firms in this sample could do with slowing the quote process down considerably and trying to strike up a conversation to build rapport. Once established there will be an inferred obligation to go ahead with the conveyancing service being offered. It is surprising how the smallest comment or interaction can make all the difference to the caller.



**Quote COMMENTS**  
XXXXXXXXXX XXXX stands out here as the output is colourful and well-presented and with a few changes could be excellent. Very little thought has gone into the output from the other firms that are missing this valuable way of impressing the client at the very beginning of their conveyancing journey.





## Our synopsis at a glance



A solid performance which seemed excellent by comparison against the other firms in the sample! It can be improved with simple tweaks and changes as discussed. There is no reason why you couldn't dominate here!



LEGAL FEE £1265



A budget performance from start to finish with this Firm. It was quite disconcerting how little this firm seem to value a new business enquiry. A dismal (but cheap) service!



LEGAL FEE £850



Another poor overall performance with a crucial red flag as SDLT was misquoted



LEGAL FEE £1200



A combination of a high fee coupled with a poor first contact experience.



LEGAL FEE £1500



# The guide to perfect scores!

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Score

5

out of 5

## Call Handling - The Perfect Score!

Incoming calls should be answered within 5 rings, Greetings should ideally be structured in 4 specific parts 'Good morning, The Perfect Conveyancer, Julie Speaking, how can we help you?' The call handler should acknowledge the caller and their requirements and explain what will happen next BEFORE putting the caller on hold. The call handler should make an effort to build rapport with the client based on the callers information (buying a new home, 'Oh how exciting, let me put you through') Hold music should be of a similar volume to the call and should be no longer than 30 seconds before the caller is reassured or a call back agreed. Where the quote is being done by that person they should explain that is going to happen following a structure like that shown below.

Score

5

out of 5

## Information Gathering Recommendations

Where a call is handed over to a fee earner or new business department the client should be formally greeted with the use of their name and ask if they could discuss their requirements (most firms launch into 'is it freehold etc!') State that there will be quite a few questions coming up and if that will be OK? It is vital to try and make this conversational rather than just asking 30 random questions and entering them into a spreadsheet. At the end of the call you should thank them for calling let them know when they will receive a quote by email and offer to go through figures over the phone IF required and explain that much of the quote will be the same wherever they go BUT most importantly offer to open a file immediately. Many clients don't want to make dozens of calls and if you have done a good job you will get the green light to go ahead immediately.

Score

5

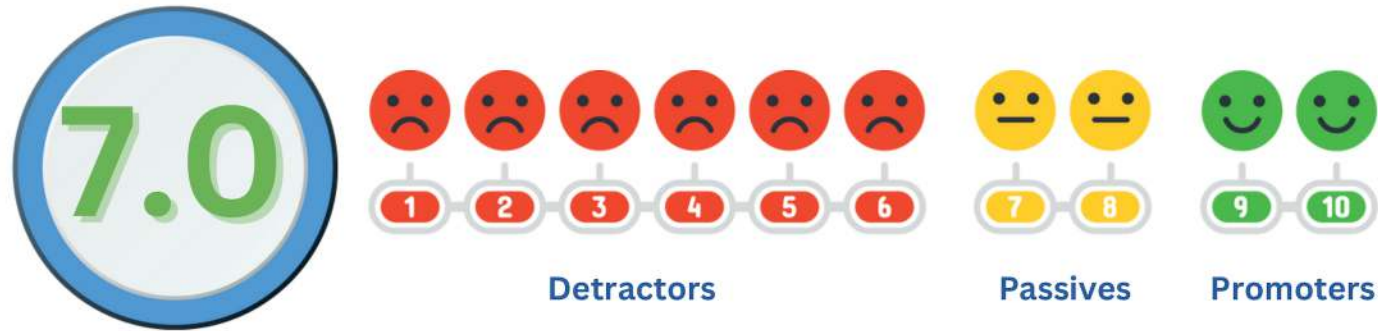
out of 5

## Your Quote Recommendations

Ideally, a quote should be received via email within 30 minutes or in an agreed timeframe. The title should relate to the property they are buying/selling not your quote reference. The email should be short and polite thanking the client for considering you. It should show costs and disbursements in a simple table with your logo and be pleasant to the eye. The quote must (of course) be factually correct and carry disclaimers. Ideally, the quote should be sent with a document that is a moving home guide which should be an advert for your practice and contain your terms of business. Try to avoid sending too much but too little is also a problem! The quote needs to be easy to take up and ideally have a button that instructs you to act on their behalf. You should check what it looks like on different devices more than 50% will be looking at it on a smartphone or tablet.



# Consumer Perception Score



## Consumer Perception Score

Consumer Perception Score measures customer experience and predicts business growth.

Simply put, your CPS score is based on whether your customers would recommend you to others. This simple question then captures all aspects of your customer service, service delivery and pricing.

**It's totally customer-centric**

***"If you build a great experience, customers tell each other about that. Word of mouth is very powerful."***

Jeff Bezos

By running research campaigns over some time (eg twice a year) you can build up an accurate picture of your performance over time.

Is your customer satisfaction improving or getting worse? Is it consistent across all areas or are some doing better than others?

## The research measures the big picture!

Research measures a customer's overall perception of you and your service. The question asks if they would recommend you to someone else, so they would have to be confident of you in every area to put their own reputation on the line.

## It's simple and easy to understand

It's one simple score, with a clear indication of what that means to your business. It breaks down all those who respond into just 3 groups: Detractors. Passives. Promoters. There aren't any complex calculations required and no specialist knowledge is needed to understand its implications.

## It's an accurate predictor

Over time, your research will be highly accurate in predicting the likelihood of winning new and repeat business. An increase or decrease in CPS scores almost always leads to an increase or decrease of new business win rates.

**You can track progress.....START TODAY!**

# Your estimated CPS Score

## Score 1 – 6 = Detractors

These customers saw you providing a poor or indifferent service. In talking to their friends and contacts they will actively recommend against you.

## Score 7 – 8 = Passives

These customers saw your service as absolutely fine, but not memorable.

They won't recommend you to friends or contacts negatively or positively. You probably won't get mentioned.

## Score 9 – 10 = Promoters

These customers were delighted with their experience. They will go out of their way to actively recommend you to their friends and contacts.

## Comments regarding your estimated CPS score

# Your CPS score suggest that

1-6

**You are likely to be losing business from word of mouth**



7-8

**You are doing a good job BUT are unlikely to be receiving many referrals**



9-10

**You are providing a great service and being recommended!**



**NOTE: This is ONLY an estimate based upon our experience as an indication of your performance on the day we carried out our research.**



# Current National scores

## Call Handling

2.8

## Info Gathering

2.6

## The Quote

3.5

We hope that this report will help you to improve your new client engagement and take up rates - we are here to help!



# Next steps

We allocate business development and training support in the field to conveyancers where there is a Search relationship with our Parent company Property Searches Direct. This helps us to align what success looks like as we are driven to win you more opportunities as it in turn delivers a greater number of search orders. A true win win for all. If you would like to know whether Property Searches Direct meet your requirements, please let us know what search bundles you are currently being delivered and at what price points.

### Staff Training

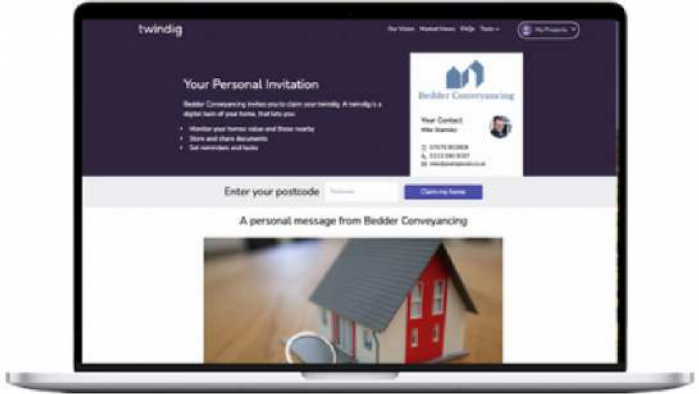
We offer highly acclaimed sales training to improve attitudinal awareness focusing on asking for the business and the powerful concept of marginal gains to your workforce. This course is designed to boost confidence and of course performance. This market research document forms the basis of the training and is offered from £894+VAT (6-10 delegates) £1,350+VAT (11-15 delegates)

### Business Development - local introducers

We are experienced in working with estate agents and appreciate that they tend to be rather short-sighted when handling clients. However, like it or not they tend to hold all the cards! It is therefore essential that you are nurturing existing and winning new introducers.

### One eye on your future - PSD Logbooks

Logbooks provide conveyancing firms with the perfect leave-behind for every completed transaction. Upload every important document safely and rest assured that clients are being regularly updated with changing property prices and have access to all of your other services. At just £150+VAT per month, they may also represent a significant profit opportunity if you charge them out as part of an archiving fee! When clients come back on the market they will come straight back to you!





# Growing your business for the future

## Conveyancer Insights offers a range of specialist services to help conveyancers and other intermediaries grow their business

### Mystery Shopping / Market Research Insights

We carry out extensive research to help you better understand your market and place within it. We find what agents are saying about you and give you insights that you would find very difficult to acquire without us. Consider commissioning reports periodically to help with benchmarking and performance management.

### Business Development

We have extensive experience of working directly with law firms and their introducers to improve their workflows and profitability by what we like to call collaborative conveyancing solutions. Consider working with our group businesses more broadly to take advantage of free support.

### Training / Consultancy services

Our Market Insights and mystery shopping bring laser sharp focus to what you are doing. Many courses of action will become available to help improve your business. We can provide a bespoke training plan where we help enable your front line staff to understand the importance of customer satisfaction to your business.

### Logbooks / Post Completion work

We are helping to spearhead the national roll out of Digital Property Logbooks to help sellers better prepare their greatest asset. Logbooks help sellers share critical information with property professionals and complete the new BASPI forms that can significantly speed up a transaction and reduce fall throughs. Conveyancers can have their own branded solution to improve client engagement and help lock them in to your brand. These are best suited to equip your clients post completion.

### Searches

We have a simple Search ordering platform but are happy for you do call the shots! We even have a concierge solution where you direct your client to come directly to us meaning you don't even have to take money on account for Searches

### Online quote tools

We have access to one of the most popular and simplest of quote tools that can tie your online 'quick quote' to your office and give your introducers immediate access to your rates 24/7

# Market Report - Summary

### Overview

We speak to hundreds of conveyancers and it is often clear that many staff are just going through the motions. Many reception/first contact staff seem to undervalue the importance of their own roles and often carry them out mechanically to simply get the job done. They are often under pressure, meeting and greeting clients and fielding multiple phone calls.

Your front-line staff are literally the face of your business and will make or break it accordingly. We refer to Reception staff as **Directors of First Impressions** they need to accept and understand the responsibility that goes with such a grandiose yet fitting title.

### The metrics

It is worth remembering that this report is a snapshot of your service compared to others on a particular day and how it would be perceived by a member of the public that engaged with your firm. Ongoing tracking research would reliably pinpoint exactly where to focus improvement efforts.

## *Small changes can have a big effect!*

When we see an exemplary performance we always contact the individual and bring it to the attention of the owners of the business.

### Recommendations

It is tempting to ignore feedback and remain in denial in the face of negative feedback. It is not all bad or uncommon. We hope that this report has been insightful and that you will work with us to improve your business further.

*'We all need people that will give us feedback, that is how we improve'*

*Bill Gates - CEO Microsoft*





## Inspirational

Inspiring training and presentation, thank-you!

GS Ops Director large law firm NE

## Marginal gains

*"The feedback I have received from the team is great and the high point for most seemed to be marginal gains"*

TH Large law firm South Yorkshire.

## Keeping the lights on

*'New work keeps the lights on: it is that simple. This is the fundamental reason why everyone in the department should take quoting (and getting better at it) seriously. It is not a distraction; it is a key component of what the department does on a day-to-day basis. It is as important as being good lawyers and Conveyancers. We currently convert approximately 44% of the quotes we give, but I understand that the better quoting firms achieve conversion rates of approximately 70%. We therefore still have some room for improvement... If each office could convert an additional 2 quotes per week that would result in more than 830 extra jobs a year for the department. A small improvement makes a big difference across the department over the year.*

*The reality is that the work is there for us to tap into, but we need to work at converting more of the enquiries we receive into open files. It really is in our own hands!'*

ES - Director Large Law firm E Midlands 2019

## Brilliant!

Just a quick email to say that I thought that the training you did the other day was brilliant.

On the right level – hit all of the right buttons with a sometimes tricky crowd!

AD Proprietor large law firm Northeast

## 5 Stars \*\*\*\*\*

*5 Stars, highly positive and engaging, illuminating section on closing and asking for the business*

PG - Director large law firm in the Northeast









# Be open 24/7 with **NO** monthly cost to you!

65% of conveyancing firms don't have an online quote tool - why?

The 'younger' generation want instant gratifications and don't phone anyone

Firms need to be open for business 24/7 in a shrinking market

4 million people work nights and many more have no access to a phone during working hours

-  No admin burden to you as prospects self-serve
-  Every prospect is followed up by phone
-  **FREE** set-up with no subscription costs
-  You only see instructed matters
-  Monthly reporting of leads and conversions
-  One single monthly fee for completed matters



 **Conveyancer Insights**

 Technology & Market Leading Support for Conveyancers

**0333 090 9187**

<https://conveyancerinsights.co.uk/business-development#first-contact>





# This is how our Logbooks can secure a client for life

*Digital Property Logbooks can significantly help conveyancers. Whilst we appreciate that you may not be struggling for new business and are unlikely to be wanting to increase pipeline volumes, firms must look to the future and prepare for when times will get tougher.*

## Benefits for you?

- ✓ Your brand in prospects homes
- ✓ Document sharing
- ✓ Reduce fall throughs
- ✓ Speed up transactions
- ✓ Long term client nurturing
- ✓ High engagement rates
- ✓ Automated communications
- ✓ Cross sell other services

## Benefits for your clients?

- ✓ FREE to use
- ✓ Organise biggest asset
- ✓ Dynamic market insights
- ✓ Set reminders
- ✓ Store important documents
- ✓ Get Legally Prepared for sale
- ✓ Easily share documents
- ✓ Safe and secure

What are you leaving with clients post completion to ensure that they come back to you when they want to sell in the future? Are you just leaving their return up to chance, or expecting another introducer to send them back to you at great cost to your bottom line?

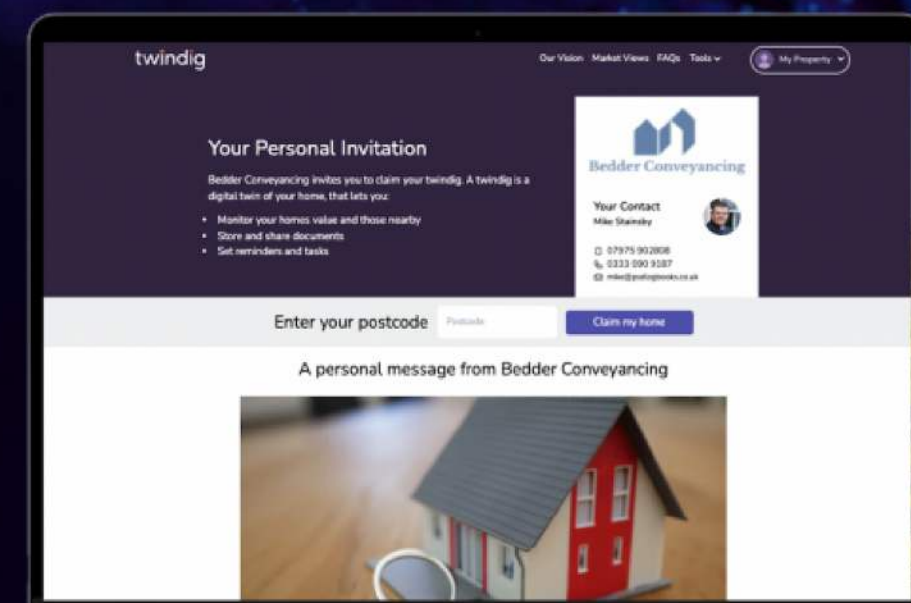
You are being referred clients every day, so why not leave them with something that permanently engages them with your brand. Just as importantly, the Logbooks are a great way to promote your other departments. Branded Logbooks give you a commercial advantage in the clients living room every time they login.

By enabling a client, post completion, to store all of their paperwork in one place, they are then guided to keep their logbook updated with any further paperwork they amass during ownership. When they come to sell, they are much better prepared and closer to being contract ready.

Whilst you might not be struggling for new business now, nurturing the hundreds of completed clients will help secure your future pipeline.

Simply enabling clients to claim a FREE logbook at completion as somewhere to store their paperwork is all that is required.

Opt out of the race to the bottom on fees and paying unnecessary repeat referrals.







# Title Deed Analysis Conveyancing Solution

Veya's conveyancing software offers instant analysis on Land Registry Title Deeds gives conveyancing firms the tools to save time, increase accuracy, and improve compliance.

## What's included in the Veya Report?

### Property Complexity Score

Veya's complexity score gives a rating between 1-100 to give you an idea of the level of complexity and risk you're dealing with. The score is calculated by an algorithm that analyses the Title Register. It considers the 'property vitals' as well as hundreds of scenarios that could impact the property in question.



### Property Vitals

Property vitals including tenure, title class and first registration date can be viewed in the Veya Report dashboard. Plus, further information around any charges and restrictions identified can be read in detail.

Registered?	Yes	✓
Tenure	Leasehold	⚠
Class of title	Good Leasehold	✗
Charges	2	⚠
Restrictions	3	⚠

### Title insights and solutions

A detailed analysis is provided, highlighting any title information to take note of. Where possible, solutions are suggested against issues raised in the title.

**Additional Information**

- There is more than one registered proprietor, ensure all proprietors consent to the sale of the property / land ⓘ
- Proprietor Surnames match ✓
- Property title is Good Leasehold ⚠
- The remaining lease term of 48 years will severely limit the number of lenders and a lease extension may be required ✗
- Mortgage product may be out of preferential rate period ⓘ
- At least 2 people are required to enable the sale of the property. Check whether any of the persons named are deceased or a trust exists; If so, ensure documents are available (trust deeds and / or death certificate) ⓘ
- There is ground rent payable on the property. Ask the seller to provide their latest ground rent demand and receipt, as a sellers pack may be required from the landlord/freeholder ⚠

### Proprietorship details

The legal owners named on the Title Register are displayed on the dashboard. Any issues are flagged for your attention, such as multiple vendors with different surnames or addresses. If you wish, you can initiate secure, digital ID&V checks against the individuals listed to check off your customer due diligence requirements.

Vendor Name	Melissa Jane Thornton	ID Check
Vendor Address	24 Church Street, WE DLR	⚠
Vendor Name	Patrick Stuart Smart	ID Check
Vendor Address	24 Church Street, WE DLR	⚠

### Land Registry OC1 and OC2 documents

The **Land Registry Title Register** is included with the Veya Report, and the Title Plan can be added on if required. Further research is just a click away with the related **OC2 documents** listed and available to purchase. All the documents can be downloaded as PDF files, including a downloadable version of the Veya Report, all within our user-friendly software for conveyancers.

Title LW433567 (Register Only)	↓
Purchase Title Plan	£
Veya Report PDF	↓
Veya Report + Title Combined	↓
Related Documents 3	Review

Get Free Report

Book a demo



# Review Your Suppliers

We recommend a range of class-leading products and services from suppliers that can help you to compete in your local conveyancing market that include:

<p><b>Digital Logbooks</b></p>  <p><b>Find Out More</b></p> 	<p><b>Business Alerts</b></p> <p>25,000 Alerts issued in 2022</p> <p>97% Projected ROI</p> <p>35% Reported conversions</p> <p><b>Find Out More</b></p> 	<p><b>Web Quotes / Case Management</b></p>  <p><b>Find Out More</b></p> 	<p><b>Title Analysis</b></p> <p>Complexity Score</p> <p>82</p> <p><b>Find Out More</b></p> 	<p><b>Title Insurance</b></p>  <p><b>Find Out More</b></p> 	<p><b>Searches</b></p>  <p><b>Find Out More</b></p> 
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"Excellent service and value from the Property Services Direct team. Immediate response to my request for a bespoke package, even on a Sunday, and the search reports started arriving the following day. All the reports, including the local authority ones, were delivered before the advised time. First class."

Mr C - Conveyancer, Portsmouth



"The level of service and attention to detail provided by Property Searches Direct Ltd was absolutely outstanding and unlike anything I have ever experienced before. I cannot praise or recommend them enough. A huge thank you to them."

Mr H - Conveyancer, Truro



"PSD provides an excellent, value-for money, efficient and friendly service. The process is clear and straightforward from start to finish. I have no hesitation in recommending Property Searches Direct to my clients."

Mr G - Law Firm, Leamington Spa



If you have used, or are using, any of the suppliers that we have listed, please let us know what you think about them. Be honest so that you can help others to make informed decisions. We would also like to hear who you would like to champion to your legal peers.

Conveyancer Insights are developing a review platform to help conveyancers identify solutions that would work best for them, but we need your help. Please get involved by sharing your thoughts of your suppliers at the following address:

<https://www.conveyancerinsights.co.uk/our-partners>





# Contact us



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