

Mystery Shop Me!

New Client First Contact Report

Prepared for July 2023



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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! - Contents

A review of your customer handling and new client onboarding processes

Your Mystery Shop Me! report	4 & 5
Customer Handling	6 & 7
Information Gathering	8 & 9
The Quote	10 & 11
Review of your scores	12 & 13
A guide to perfect scores	14 & 15
Net Promoter Score	16 & 17
National Scores & Next Steps	18 & 19
Growing your Business	20 & 21

Recommended solutions

Conveyancing Calculator (Hoowla), PSD Property Logbooks Title Checking (Veya) Supplier Reviews



C Conveyancer Insights

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

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

Customer call Handling

Call Handling - performance measurement YES/NO 1 Point 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?

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



Call was answered by an automated system and then quickly picked up with a professional welcome & greeting. The person I need to speak to was on the phone but 'I will get her to call you'. No name was offered and no attempt to build rapport was made. Pretty basic service so far!

Initial Call Handling

1. Call answered promptly

YES

2. Professional Introduction

YES

NO

3. Name offered

YES

4. Explanation of what happens next

5. Rapport with customer

NO

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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

8

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." 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



Jill called me and seemed surprised that buying a Taylor Wimpey home would be new build and would get someone from new homes to call me - took more details....making a meal of it.

Received a call from Anne (several hours later) that ran through a quote. No attempt was made to ask us for the business or build rapport.

Information gathering

1. Name offered?

YES

2. Quote given over the phone?

NO

3. Rapport / interest in client?

NO YES

4. Explanation of next steps?

...

5. Asked for the business?

NO

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

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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 quite 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



The promised quote was received promptly and was factually correct but was very basic leaving SDLT to 'to be advised' even though we discussed SDLT in detail. No other useful information was attached and the quote wasn't easy to take up.

The Quote

1. Quote received promptly via email?

YES

2. Quote easy to read and well laid out?

NO YES

3. Quote apparently factually correct?

NO

5. Next steps present/easy to follow?

4. Other useful information attached?

NO

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

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Our Recommendations - Based on your scores

Score

3 out of 5

Call Handling Recommendations

The call was answered quickly and professionally. It was a shame that the receptionist didn't offer her name or make any attempt at rapport before taking my number for a call back. This would have been an opportunity to further qualify the call.

Score

2 out of 5

Information Gathering Recommendations

Some practice needs to be put in to make the quote process less of a bore and make it more conversational. A poor initial call handler made the process harder than it needed to be, resulting in more than one call because of new build difficulties.

Score



Your Quote Recommendations

A moving home / meet the team guide would have improved the quote no end There was no excuse to leave SDLT blank

The quotes need to be redesigned to make them easier to read, understand and take up.

The secret to perfect scores!

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



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



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 on the eye. The quote must (of course) be factually correct and carry disclaimers. Ideally the quote shuld 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 smart phone or tablet.

Net Promoter Score



Net Promoter Score

Net Promoter Score®, or NPS®, measures customer experience and predicts business growth. This proven metric transformed the business world and now is probably the number one metric for businesses around the world for measuring the total customer experience. Simply put, your NPS 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. Below are some reasons why NPS is now considered the best indicator for businesses managing their customer satisfaction:

It's totally customer centric

Jeff Bezos

NPs is the view of the customer. No other survey captures the customer viewpoint so easily or so succinctly. It asks customers the big question about you in a way that is easy for them to understand.

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

It measures the big picture!

NPS 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, it's been proven that NPS is highly accurate in predicting the likelihood of winning new and repeat business. An increase or decrease in NPS scores almost always leads to an increase or decrease of new business win rates.

You can track progress

By running NPS research over a period of 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?

Your estimated Net Promoter 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 NPS score

Your NPS score suggest that



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!

X

NOTE: This is ONLY an estimate using the theories of the NPS system as an indication of perforance on the day.

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16 <u>back to contents</u>

And Finally

Current National scores

Call Handling



Info Gathering



The Quote



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)



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.

GOAL COACHING OPTIONS REALITY



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!



19

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 periodlically to help with benchmarking and perfomance 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 - CFO Microsoft

21



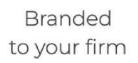
hoowld The Conveyancing Calculator

FREE* for all clients of Property Searches Direct

*Subject to a minimum of 15 Pack orders per month







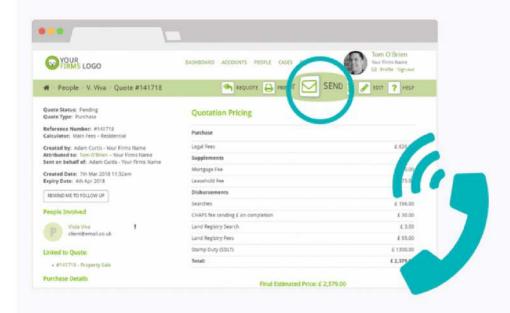


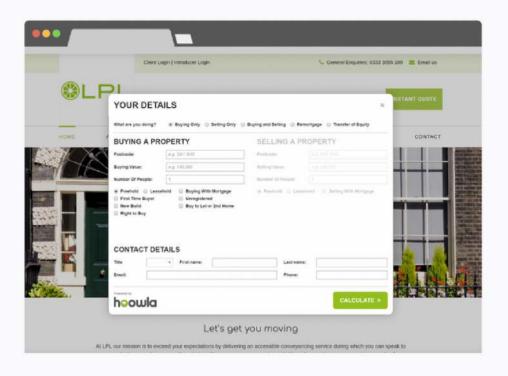
Multiple offices supported

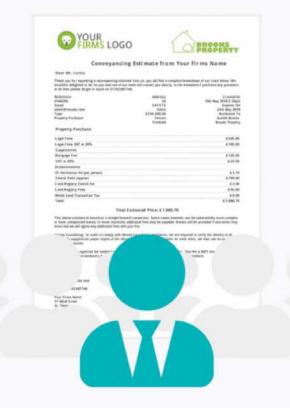


Full API & Webhooks

Over 30,000 conveyancing quotes generated a month from 200 + firms







Privately

Everyone in your firm can generate quotes quickly while taking a call or seeing a client face-to-face. Hoowla works on your mobile and tablet so you can quote on the move.

Generate a quote in under 20 seconds.

On your website

Put a dynamic fee scale on your website to allow potential clients to request an instant quote and collect leads 24 hours a day.

Branded on any page of your site.

Securely via your network of conveyancing referrers

Free and unlimited access for all your estate agents and mortgage brokers, allowing them to quote on your behalf. No limit to the number of referrers you can add.

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?

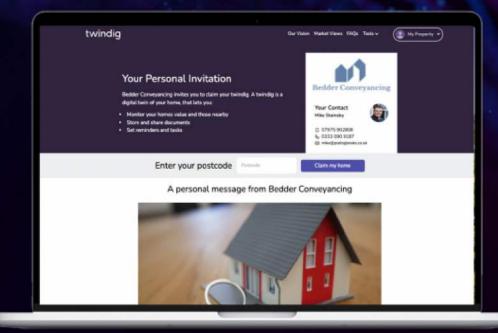
You are being referred clients every day, so why not leave them with something that permanently engages them with your brand. Just as importantly, the Logbooks are a great way to promote your other departments. Branded Logbooks give you a commercial advantage in the clients living room every time they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







Veya 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.



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	A
Vendor Name	Patrick Stuart Smart	ID Check
Vendor Address	24 Church Street, WE DLR	A

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	0
Tenure	Leasehold	A
Class of title	Good Leasehold	8
Charges	2	A
Restrictions	3	A

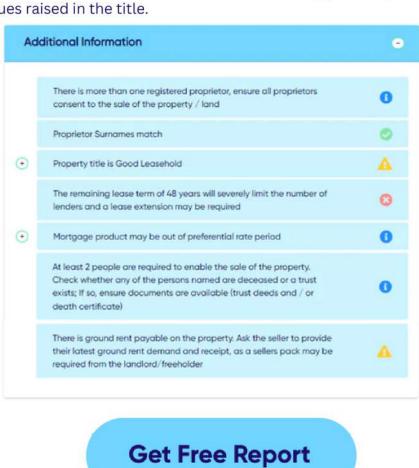
Land Registry OC1 and OC2 documents

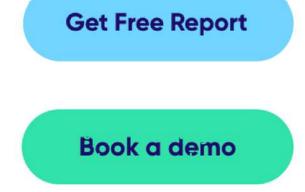
The Land Registry Title Register is included with the Veya Report, and the Title Plan can be added on if required. Further research is just a click away with the related **OC2 documents** listed and available to purchase. All the documents can be downloaded as PDF files, including a downloadable version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



Title 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.





Phone: 0333 533 0125 www.askveya.com

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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:







"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."

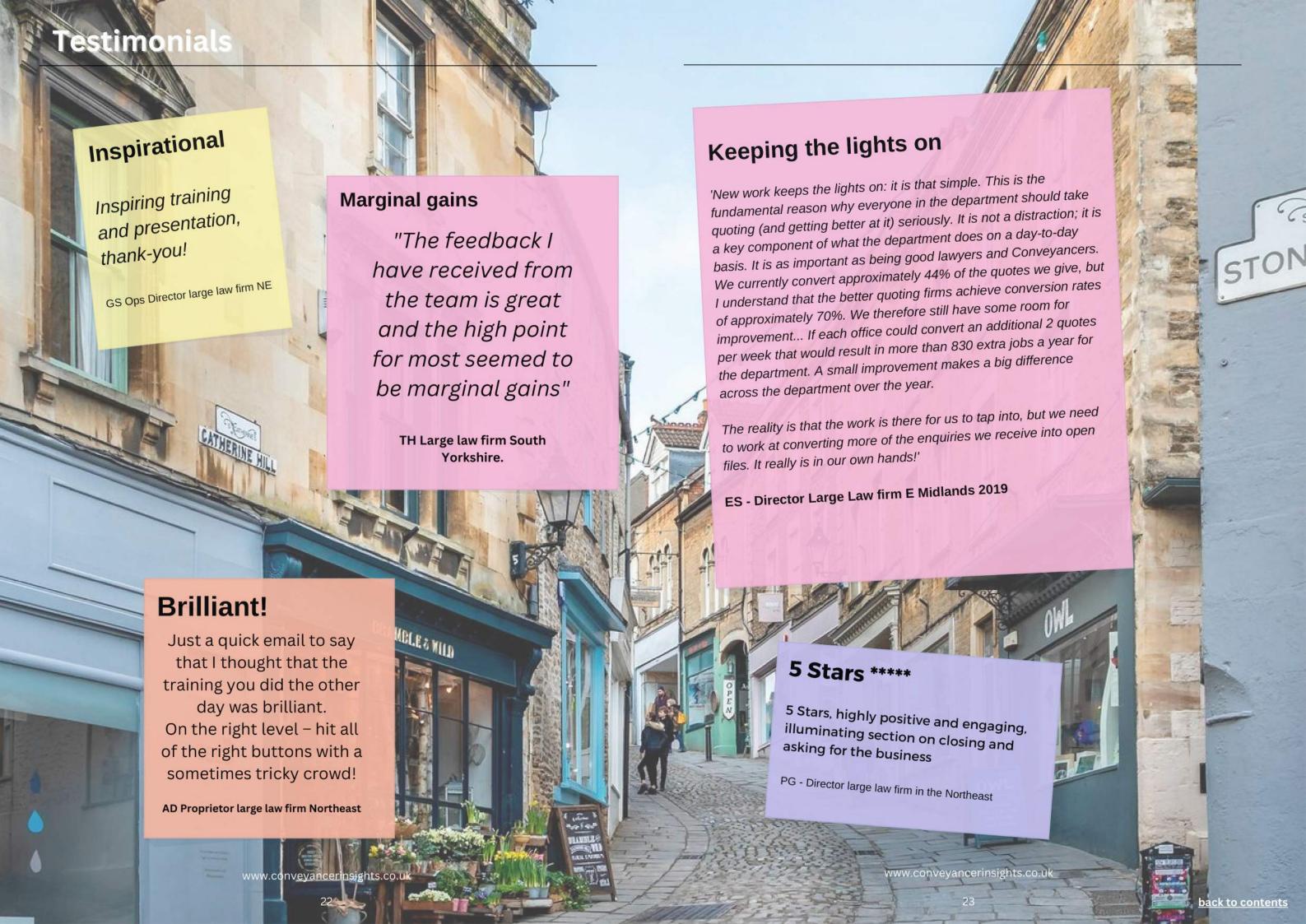
Mr G - Law Firm, Leamington Spa



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





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