

How to Win Estate Agent Contracts



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Introduction



So, you're ready to grow your field service business, and you're eyeing the many, many jobs available through commercial clients—like estate agents. These companies manage multiple residential or commercial properties, and all of them will need the type of services you offer at some point.

So why not look for opportunities to create partnerships?

We know why: Right now, customers come to you when a pipe bursts or they need a new boiler installed. Your website and social media accounts bring in all the work you need. However, estate agents work differently. You have to reach out to them, then attend sales meetings, write tender proposals, and do all those other marketing-and-promotion tasks you aren't entirely familiar with...

Yet.

We've put together this guide to landing estate agent contracts to help you grow your business. At the end of the tutorial, you'll find a worksheet you can fill out to make sure you're ready to wow estate agents and win jobs from them.

Let's get started.

Get Prepped



Before you start talking to estate agents, you need to make sure your business is set up to handle them. For example:

Add an 'Estate Agents' tab to your website. Even if you don't have an estate agent client yet, make it clear that your business can provide the services that they need.



Similarly, update your company's social media accounts and your website's 'About Us' page to include the fact you serve estate agents...



Create any marketing pieces that appeal to their industry. A printed brochure or case study works great, or get creative with **interesting alternatives to the standard brochure**, like a video they can view on social media, or your website.



Think about what makes your business better than your top competitors. You'll need this information when you start reaching out to estate agents.



When you win a contract with a large estate agent, will you need to hire more engineers? If so, take steps to get the recruitment process rolling, even if it's only speculative at this point.



Additional reading:

If an estate agent contract will have you scrambling to hire engineers, check out our article '[**4 Creative Ways to Hire Engineers for Your Field Service Business**](#)'.

Look Big



Afraid your business looks too small to interest an estate agent? We have some good news for you: technology makes even a tiny company look like a big fish.

Email accounts with your business domain are usually cheaply available from your web service provider, so you can be [name@flowpumbing.co.uk] instead of [flowplumbing4d@gmail.com].



Use field service management software that lets you send professional-looking communications to estate agents and their tenants, create and send certificates and other necessary documents, and more. May we humbly suggest **Commusoft**?



Impressive web design is inexpensive when you do it yourself with a cloud-based web development platform like **Wix**. (Here's info on [transferring a .co.uk domain](#) to Wix.)



Make sure your business's outgoing voicemail messages sound professional.



Be GDPR-compliant (click to read our guide). You have to do it anyway, but it's even more important to be compliant when working with large agencies that have many tenants and buyers.



Additional reading:

Inc. magazine offers a helpful article called '**Making Small Look BIG: 5 Ways to Give Your Business a Big-Time Look**'.

Plan your Communications



Before you find and start reaching out to the estate agents that are most likely to use your services, you need to get your communications in order.

Right now, you're probably used to dealing with one person at a time. With estate agents, however, you'll be on the hook with two entities: the estate agent and their end customer.

This extra layer of complexity can trip you up, so it helps to sit down and create a communications plan. **Bonus:** Estate agents are sure to be impressed that you've thought through the issue and have both their needs and their tenants'/buyers' needs in mind.

Create a flowchart which shows the communication processes that will happen when you get calls from estate agents. When you come across a weak link in your communications chain—which is any spot where you predict the estate agent or their tenant/buyer will become unhappy or frustrated—take steps now to fix it.

For example, field service management software (like Commusoft) can streamline the process to help you avoid frustrating miscommunication and delays. In the worksheet following this guide, you'll find a checklist to help you figure out your communications process.



Additional reading:

Your engineers need to be good communicators, too. **[Here's how to turn them into customer service pros.](#)**

Start your Search



There are many, many estate agencies you can reach out to, and luckily, Zoopla has compiled them all into a **handy directory**. Now you don't have to spend days researching yourself!

The number of estate agents listed here might seem overwhelming, but you can also use the site's **"Find agents" search feature**. Here, you can refine the search to make sure the results are more relevant for your business.

The Zoopla listings show how many properties an estate agent has for sale and for rent, and the average asking rent. Look for companies that have enough properties that they might need your services, but not so large that they'll likely already have their own in-house field services operation. If in doubt, you can always call and ask...more on this next.



Additional reading:

Hubspot shares their secret methods for finding potential clients in their article '**8 Little-Known Ways to Find New Prospects on LinkedIn**'.

Pick up the Phone



There are many ways to reach out to estate agents, whether it's LinkedIn or other social media, you've also got email, or even a letter!

However, the fastest and most direct way is to pick up the phone and call.

Not many people make marketing calls these days—because, frankly, they're scarier than other types of marketing—which means you'll cut through the clutter of emails and notifications that agencies likely receive every day.

Tell whoever answers that you're with “Some Like It Hot Heating Services” (Warning: use your actual company name here), and you want to know who to talk to about offering your services. When they transfer you, you'll either get that person or their voicemail. What you're looking for here is not to make an instant sale—because it won't happen—but to start a conversation and set up an in-person meeting.

If you have to leave a voicemail, mention that you'll follow up with an email and then do so. In fact, creating a regular but not-overly-frequent schedule of follow-ups, both for non-responders and interested prospects, will help keep you top-of-mind.



Additional reading:

Nervous about making calls? Check out the tips in this free PDF [**Cold Calling for Introverts**](#) by Allen Mayer.

Meet Up



After all your preparation and hard work, chances are you'll score a meeting—or three. This is where freak-outs often occur, especially if you're used to dealing with customers by phone and email.

Cancel that freak-out session, because you already have a lot of the necessary people-skills from running your field service business:

- **You understand the importance of being on time**
- **You dress professionally**
- **You're passionate about creating a positive experience for your customers**
- **You're an expert on the ins-and-outs of your industry**

Research points

With that being the case, you can use the points below to assist you in your research before a meeting, and there's even a few things you might want to ask when you're in one, too.

- ① **What kinds of properties do they own and rent, and how many of each?**
- ② **The company's history. (You can often find this on their 'About Us' page.)**
- ③ **The background of the management team. (Check bios on LinkedIn or look for the 'About Us' / 'Meet the Team' page.)**

④

What their greatest needs are. For example: have you found tenant complaints on review sites about broken plumbing or cold rooms?

⑤

Find out if the prospect already uses a field service company. If they do, see what you can find out about your competitor and if you can position your business as a better alternative.

Good research will help you to develop intelligent, useful questions that you can ask during the meeting. It might also help you to better prepare for questions they'll ask you, too.

By focusing on the prospect's needs, and asking a handful of smart questions, you'll impress your prospect far more than if you went on the hard-sell about how great your company is (even if it's true).



Additional reading:

To make sure you're dressed for the occasion, check out this **Inc.** magazine article **'5 Rules on How to Dress for Sales Success'**. (No, you don't need to wear a three-piece suit.)

Write up your Proposal Bid



If the estate agent is interested in your services, they'll likely ask for a proposal (a plan) and a bid (a price) based on their needs.

Don't skimp on the proposal part; that's where you'll show the value you're offering. Write up a plan that shows you're looking out for the estate agent's needs, and that also highlights your company's expertise and unique selling points. For example, you might: detail how many maintenance visits your qualified engineers will make, talk up the necessary certificates you'll provide, and outline your process for handling the estate agent's emergency calls, too.

When coming up with your bid, remember that it needs to meet your needs as well. It's fine and expected to offer a discount in exchange for a year-long contract, but there's no point in undercutting yourself to win a contract only to go out of business because you didn't earn enough.

It's tempting to simply try to hit a sweet spot between what the estate agent can afford and your rock-bottom minimum, but take the time to think about what your costs are before coming up with your final number.

Using an app like **[PandaDoc](#)**, which lets you quickly create and send proposals will help you get it right; they also have an 'Academy' section for additional lessons to learn but you can learn more here, too, and **[download an eBook](#)** to help.



Additional reading:

Not sure what to charge? **[We put together this concise guide on how to set your prices per job.](#)**

How to Win Estate Agents Contracts

The Worksheets



These worksheets will help you prepare for pitching your services to estate agents, from contemplating your business advantages to preparing your bid. If your business is on the smaller side. Fill it out, fix any areas where you're missing a key item—and you're ready to start landing those coveted contracts.

DIFFERENTIATE YOURSELF

What are the top three things that differentiate my business from my competitors? What advantages can I offer estate agents that larger competitors can't?

1. _____

2. _____

3. _____

How can I incorporate these differentiators into my website, social media, marketing materials, proposals, etc.?

GET READY TO MARKET

When you do start contacting estate agents, you'll want to have all your marketing materials ready to go so you're not rushing to put together a brochure or video—and at the same time, updating up your marketing can help attract estate agents to your business.

Here's a list of tasks that will get you started. We recommend you get that 'Estate Agents' tab up on your website and adjust your social media marketing to attract estate agents *now*; for the other suggested tasks, you can choose based on the resources you have available and what you feel would help your business stand out to estate agents. Most of these are ideas you can do yourself, with minimal staff, or with help from freelancers.

Create an 'Estate Agents' tab on your website (and add marketing copy there, of course).

Update social media profiles and company bios to mention that you work with estate agents.

Develop a brochure.

Update your outgoing voicemail message to mention that you work with estate agents.

Start an email newsletter specifically for estate agents, with short articles relevant to their interests.

If you have blog on your company website, start including posts on topics that are relevant for estate agents.

Create a video that you can add to your website's 'Estate Agents' tab and/or load onto a thumb drive as part of your in-person marketing materials.

Create a print book or e-book on a topic of interest to estate agents (such as how to hire the best field service business or how to handle the most common plumbing issues in rental units).

Start curating interesting and relevant articles, websites, and leads you can share with estate agents. (Remember, it's all about what *you* can do for *them*, not what *they* can do for *you*!)

If you already have an estate agent or two among your clientele and are looking for more, ask them for testimonials you can add to your website and company LinkedIn page.

Other: _____

GET BIG

We're not saying you have to pretend to be a giant organisation when you're a five-employee business—it's more about looking like the kind of business that can handle an estate agent's needs. Make sure to have these crucial items.

Do I have...

- | | | |
|--|------------------------------|-----------------------------|
| Professional-looking website design? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| A professional-sounding outgoing voicemail message? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Field service management software like Commusoft? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| An email address at my business domain instead of a generic one? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| GDPR compliance? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| A plan to quickly onboard new engineers if I win a contract? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

If you ticked 'No' for any of these, jot down some ideas on how and when you can make it happen.

PLAN YOUR PLAN

Before you start researching and calling estate agents, let's get your communication plan in order. To create that flowchart we recommended earlier in the guide, answer these questions. *

What's the first thing that happens when an estate agent calls my company?

Is there a way for my company to know who callers are without having to ask?

Once the estate agent relays a request, how quickly can we book the job?

What will we do if the request is an emergency?

What will we do if we're not able to book the job in a timely manner?

How will we communicate the appointment window to the end customer (tenant or buyer)?

What reminders will we send the end customer about the upcoming appointment? (Text, email, phone?)

What reminders will we send the estate agent about the upcoming appointment? (Text, email, phone?)

How will we communicate with the end customer if an engineer is running late?

If an engineer needs to order a part and return to the job at a later date, how and when will we communicate that to the estate agent and the end client?

If an engineer needs to order a part and return to the job at a later date, how will we keep all parties up-to-date when the part becomes available?

Once the job is finished, what documentation will we send to the estate agent and how will we send it?

What follow-ups will we send, and how?

What will we do if the estate agent or the end customer are unhappy with the finished job?

** Remember, a field service management solution like Commusoft can be used to streamline most of these steps, and also to look more professional to the estate agent.*

MAKE THE CALL

Here's where you can create a list of the estate agents you'd like to reach out to. We have room here for 7, but of course the more the better. If you need to, print out extra copies of this page so you can make your list even longer.

Estate Agent	Contact Name	Phone	Email	Location	No. Properties to Buy/Rent	Avg. Asking Price	Date Contacted	Follow-up date

MEET UP

When you've landed a meeting with an estate agent, here's how to make sure you're ready before you head out the door.

I...

Have my brochure or other marketing materials all set to go.

Created a list of questions to ask the prospect.

Am dressed professionally.

Will be leaving at _____ to make sure I get there on time.

MAKE YOUR BID

If you're at this point in the worksheets, congratulations! Answering these questions will help you put together a proposal and bid that will win you a nice, fat contract.

What are the start and end dates of the proposed contract?

How many properties will I be responsible for?

What am I offering the estate agent? (Emergency visits, maintenance, repairs, certificates, installations?)

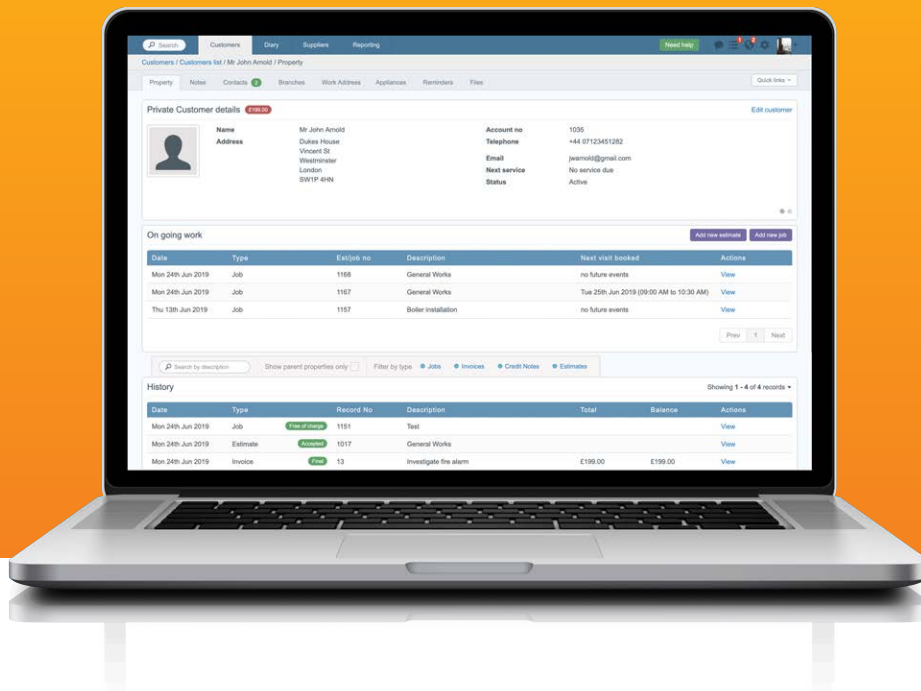
What qualifications and tools does my business have that will make the partnership a success?

How much will I charge for the entire contract?

What 'extras' am I including in this price?

How will the amount be paid, and on what schedule?

What's the best way for the estate agent to get in touch to discuss my proposal and bid?



We hope our guide to winning estate agent contracts helps you break into this lucrative market and grow your business. Wondering whether field service management software will help your case? Take a tour of Commusoft's solutions and request a demo today.

[Watch the free demo](#)



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