



# The Front Room Advantage



**How to win more  
instructions at  
Market Appraisal**

# Why market appraisals matter now more than ever

In today's digital-first world, the market appraisal might feel like just another step in the process, but it's still one of the most important. When vendors invite you into their home, you're not just there to value a property. You're being assessed on trust, professionalism, and whether you're the right person to guide them through an important decision in their lives.

That makes every moment in the front room count. And in a crowded market, where vendors are often speaking to multiple agents, it's how you prepare, present and follow up that turns your appraisal into an instruction.

This guide breaks that down, step by step, giving you practical tools, tactics and ideas to help you stand out at every stage.



## Overview

- 01 Before the doorbell rings:**  
Prep to set you apart
- 02 In the room:**  
How to deliver a pitch that lands
- 03 After the appointment:**  
Follow-up that wins instructions
- 04 The iamproperty Difference™**
- 05 Summary**



# Before the doorbell rings: Prep to set you apart

You don't need to wait until the appointment to make an impression. In fact, some of the most important groundwork happens before you've even knocked on the door.

## Personalised pre-appointment comms & insights

A short video from the valuer. A helpful guide to selling. A branded message with appointment details. These small touches instantly position you as professional, organised, and proactive.

To maximise your open rate on pre-appointment comms, we recommend you introduce what they will receive on the initial

call, and keep the pre-appointment comms email brief so they click on the presentation link to get the information.

Agents who use our pre-appointment templates see a noticeable increase in vendor warmth and openness. It's that feeling of 'they've already done their homework'.



### Go beyond basic reminders

The iamproperty Marketing Toolkit lets you send dynamic, branded personalised invites that include the valuer's photo, company overview, and your services details. This sets a professional tone and builds familiarity before the appointment.



#### Toolkit tip

Use the pre-appointment invites in the Marketing Toolkit to send personalised invites and build familiarity before you arrive.

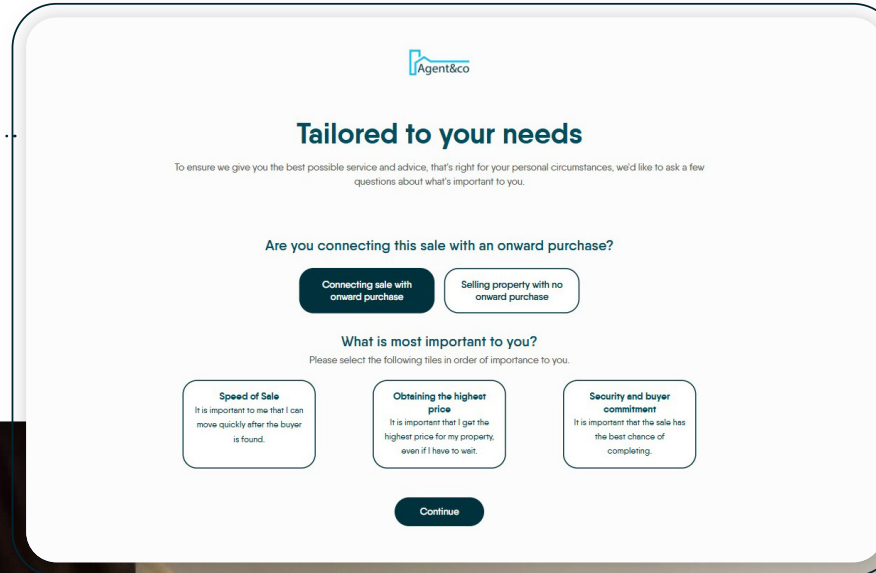
## Know the vendor, not just the property

Access millions of properties and pricing insights, helping you shape a valuation with real credibility. Vendors don't just want a number – they want to understand *why*.

But, go a step further – what's driving the move? Understanding their motivation with a pre-appointment questionnaire means you can tailor your pitch to what matters to them and their moving circumstances and priorities.

## Do your competitive homework

How do your results compare locally? What does your stock-to-sale ratio look like? With data-backed comparisons you can be confident in positioning your agency against the competition and showcasing how you stand out.



**Agent&co**

### Tailored to your needs

To ensure we give you the best possible service and advice, that's right for your personal circumstances, we'd like to ask a few questions about what's important to you.

Are you connecting this sale with an onward purchase?

Connecting sale with onward purchase | Selling property with no onward purchase

What is most important to you?  
Please select the following files in order of importance to you.

Speed of Sale  
It is important to me that I can move quickly after the buyer is found.

Obtaining the highest price  
It is important that I get the highest price for my property, even if I have to wait.

Security and buyer commitment  
It is important that the sale has the best chance of completing.

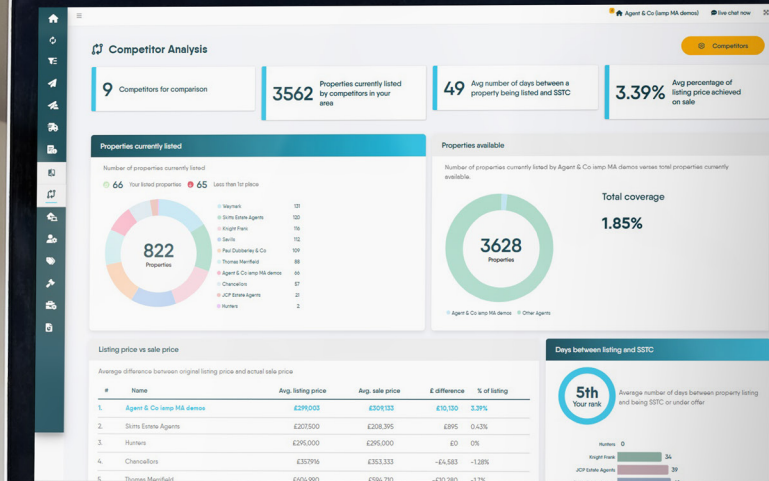
Continue

## Marketing insight Downsizing is accelerating

Since the 2024 general election, agents have reported a rise in homeowners, especially older sellers, considering downsizing. The driver? Anticipated tax reform. Potential changes to inheritance tax are causing sellers to move sooner to protect their assets.

“There's definitely more urgency. Older vendors are asking more detailed questions around timelines, inheritance tax and market stability.” – Agent, North East

This means clear timelines, lower stress and support with legal prep are more valuable than ever. Be prepared to talk about how your services support that.





## Marketing matters – and sellers are paying attention

If your marketing doesn't impress your vendors, they'll assume it won't impress buyers either.

A recent benchmarking report compared the digital visibility of 12 of the UK's largest Estate Agency brands. The gap in performance between the top and bottom ranked agents was huge – and this is exactly the kind of thing sellers are noticing.

- + Website performance and local SEO presence
- + Email engagement rates
- + Social visibility and brand awareness
- + Use of interactive tools and mobile-friendly proposals

Vendors are just as likely to Google you as buyers. Your digital presence is now part of the pitch.

**[ClickThrough Marketing: UK Estate Agents Digital Benchmark Report Q1 2024](#)**

If you've invested in better marketing tools, make sure that's part of your pitch. Showcase how you market to potential buyers, what tools you use and your digital reach.



### Quick prep checklist

- ✓ Have they filed in the questionnaire? Do they need a reminder? This will give you information on what services will suit their needs.
- ✓ Look at the local market trends.
- ✓ Identify comparable properties and competitor stock from the same street or postcode.
- ✓ Analyse key property information local services and planning applications.

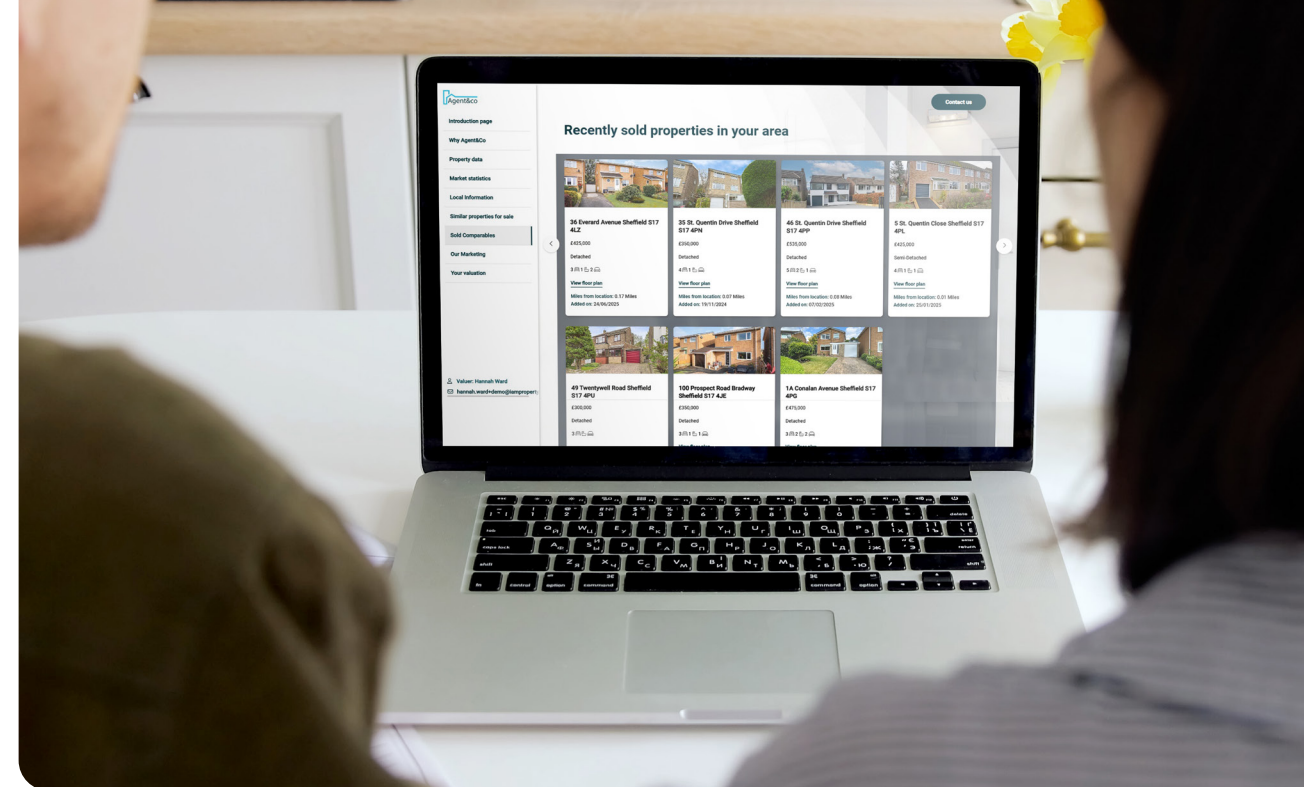
By following these simple steps and you should be fully confident and prepped for a successful appointment.

# In the room: How to deliver a pitch that lands

You've done the prep, now it's time to build trust, demonstrate value, and show the vendor they're in safe hands.

## Build rapport, fast

The basics still count – arrive on time, be friendly and professional. Listen before talking. Vendors want confidence, but they also want to feel heard. Ask open questions, reflect back their priorities from the pre-appointment survey and show them you've paid attention.



## Sell the service, not just the property

Professional photos. Buyer app access. An experienced Sales Progression Team. Talk about your process in a way that feels tailored to them. Use examples of similar homes you've sold and share relevant success stories.

There's been a significant uplift in sellers doing research before choosing who to instruct. They're reading online reviews, comparing performance stats and watching how you market others, not just how you show up on valuation day.



## Marketing insight

According to the latest tracking by The Times, estate agents now have more properties on the books than any time since 2014. That's great for buyers, but it means vendors have more choice in who they work with.

In 2024, estate agents averaged 63 homes per branch – the highest in a

decade. **The Times: Estate agents' books fill up as mortgage rates fall.**

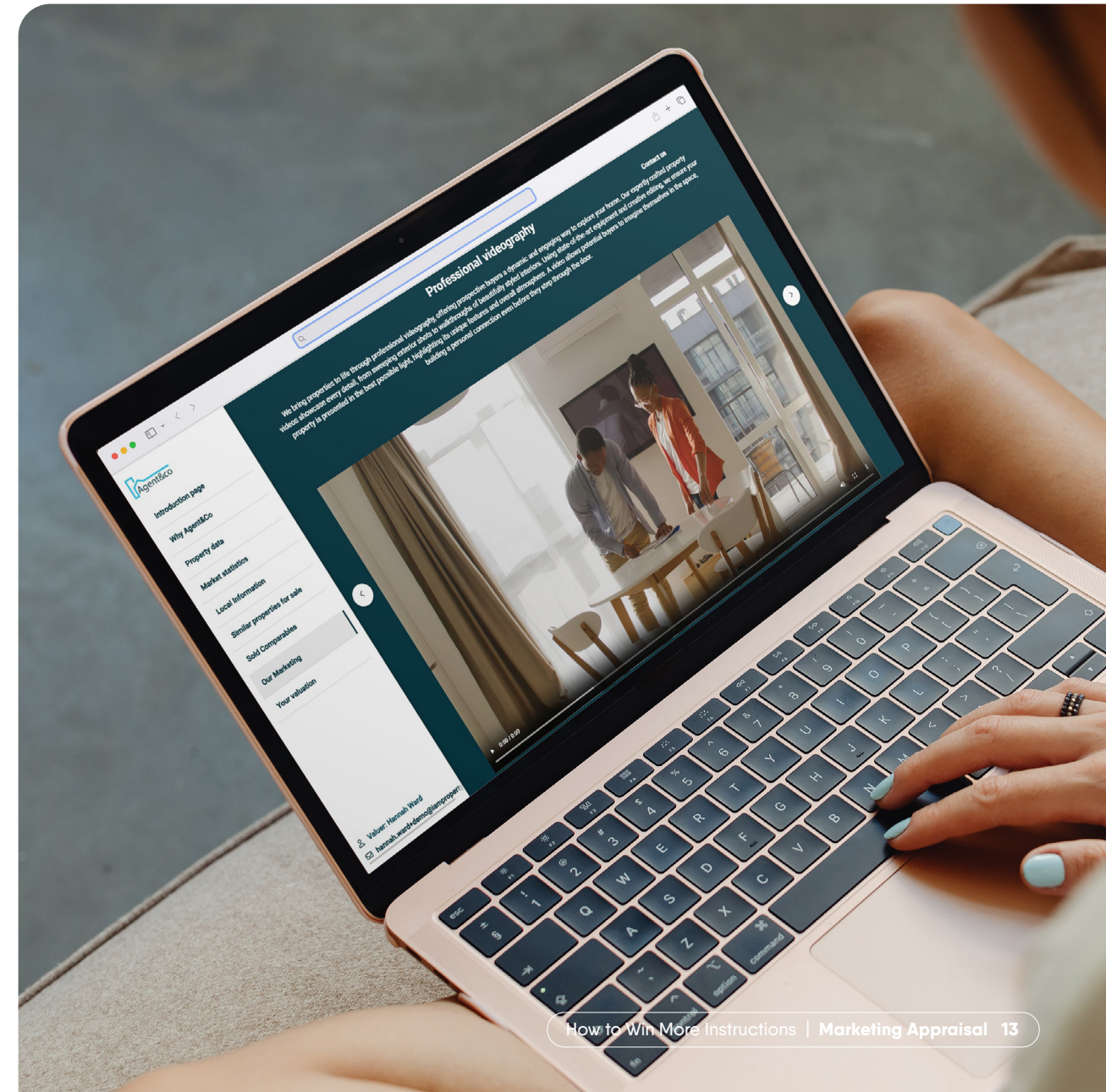
Be ready to explain how you'll stand out, especially online. Talk about professional photography, listing quality, social reach and the full marketing journey.

## Interactive, branded presentations and proposals

Using the Market Appraisal module you're not flipping through a paper brochure or a PDF on a laptop – you're showing a custom-built, interactive presentation that uses real-time data, mapped visuals and even integrated video to make your pitch memorable. It's the difference between saying you're professional and showing it.

### Toolkit tip

Use your branded, interactive appraisal presentation to bring this to life visually and clearly.





## Highlight what makes you different

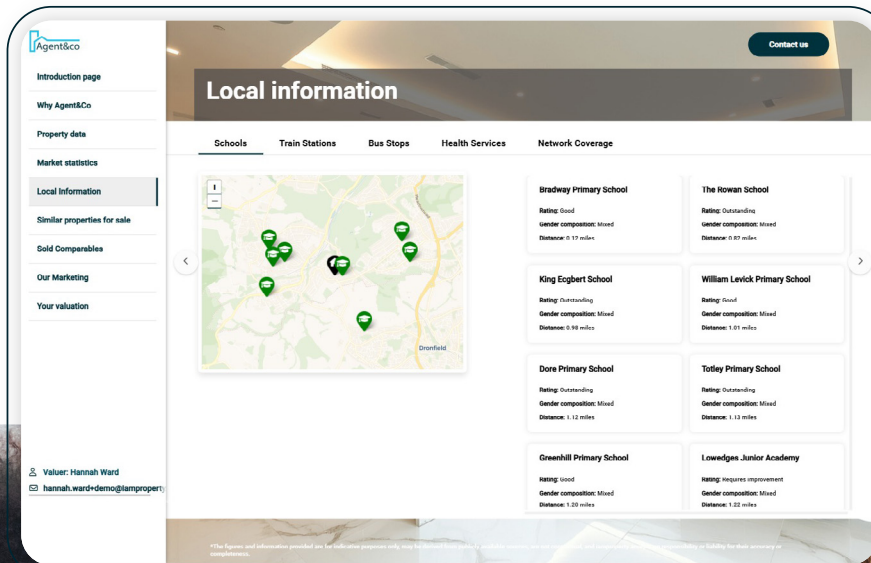
Auction. Premium Conveyancing. Compliance support. These aren't just extras, they're part of a faster, more supported sales journey. Position them as ways to help vendors reach their goals sooner, with less stress.

## The tools that do the talking

Use the data visuals from your Market Appraisal tool to walk vendors through:

- + How their property compares
- + What similar homes are achieving (not just listed for)
- + Their local information and how that impacts their property
- + How your services match their requirements

This turns what could be a vague pricing chat into something transparent and trusted.



## Handle objections with confidence

Whether it's about fees, timing or valuation, don't shy away. Be clear, honest and back up your answers with data and examples.



### Toolkit tip

Use service recommendation tools to personalise your offer based on the conversation.



## Leave a lasting impression

Closing your appraisal appointment isn't just about ending on a positive note, it's about reinforcing the trust and confidence you've built throughout. Before you leave, summarise the key points clearly, reassure the vendor of your commitment, and confirm the next steps. This helps eliminate doubt and sets clear expectations, positioning you as the trusted expert ready to guide them forward.

Remember, winning the instruction isn't just about being impressive; it's about being memorable and trusted. Leave them feeling confident not only in your valuation but in your ability to support them every step of the way. With the right preparation, a clear pitch, and the power of interactive, tailored proposals at your fingertips, you'll turn more appraisals into confirmed instructions.



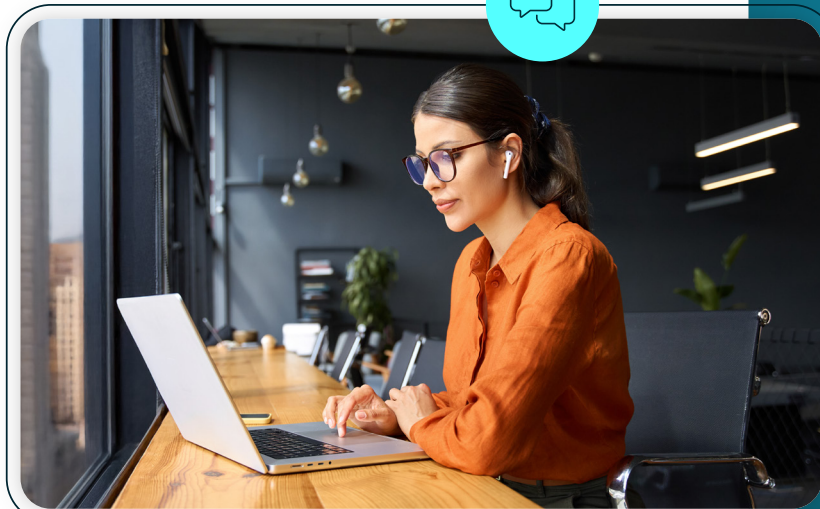
# After the appointment: Follow-up that wins instructions

**The appraisal appointment is only part of the process. Your follow-up is where trust deepens, and where many agents lose ground by going quiet. The follow-up isn't just a one-off email.**

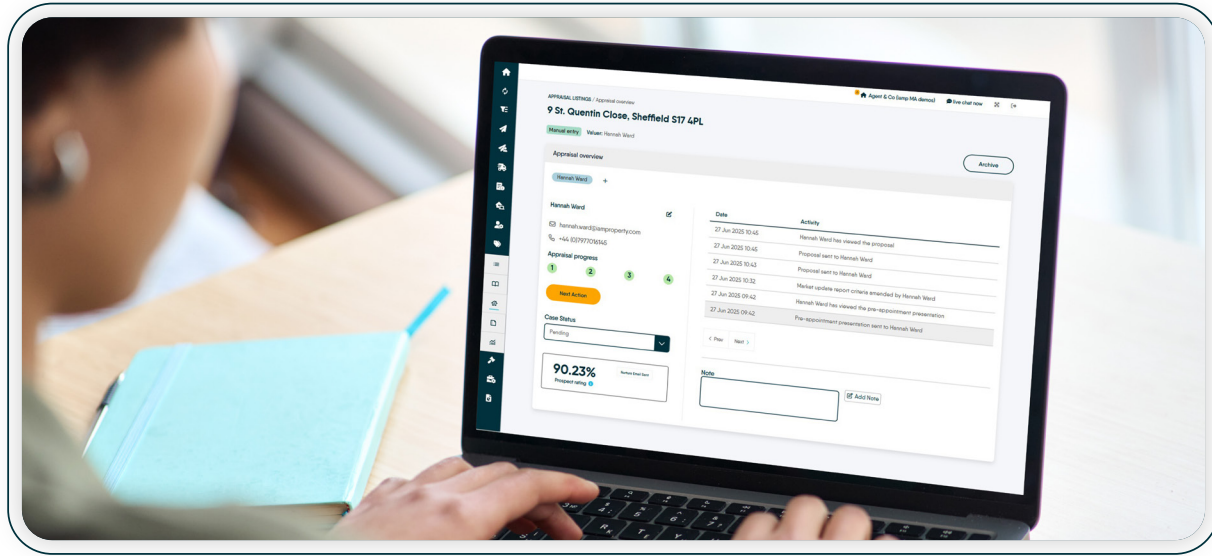
With our Market Appraisal proposals and post-appointment automation turned on you can send a fully branded proposal, tailored to that vendor's needs, followed by timed nudges.

## Follow up fast

Send a thank you message and proposal within 24 hours. Reiterate key points you discussed. Reassure them of your attention and care.

A screenshot of a web application interface for 'Agent & Co (amp MA demo)'. The page is titled '9 St. Quentin Close, Sheffield S17 4PL' and shows a progress bar with four steps: 1 Pre-appointment, 2 Insights, 3 Presentation creation (active), and 4 Nurtured journey. The main section is 'Prepare to send proposal' with a sub-header 'Complete these pages and send out the proposal to your prospect.' It includes fields for 'Email template' (Main comms), 'To' (Hannah Ward), a checkbox for 'Copy valuer/office', and 'Email subject line' (Main comms). Below is a rich text editor for 'Email content' with a paragraph of text: 'Hi, Thanks again for taking the time to meet with us. It was great to learn more about your property and your plans moving forward. <<APPRAISALPRESENTATION.LINK>> If you have any questions or would like to chat through the next steps, feel free to get in touch - we're here to help. Looking forward to working with you!'. There is a checkbox for 'Send an SMS as well as email' and an 'SMS content' field with the text: 'Thanks for meeting with Agent & Co! Here's your proposal and what we discussed: <<APPRAISALPRESENTATION.LINK>>'. A 'Send proposal' button is at the bottom.





## Follow the signals – tracking engagement to act at the right moment

Timing your follow-up matters, and being able to act at the right moment makes all the difference. The iamproperty Market Appraisal module gives you real-time insights on when your vendor views your interactive proposal. This lets you follow up exactly when they're engaged and

most receptive, increasing your chances of securing the instruction.

Rather than guessing when to make contact, you'll know precisely when your prospect is thinking about you – enabling timely, targeted conversations that feel natural, not intrusive. It's a smarter way to follow up, designed to help you convert more appraisals into confirmed instructions.

## Keep the relationship warm

If they're not ready to list yet, don't disappear. Regular updates, local insights and check-ins keep you front of mind for when they are. Many vendors are hesitant at first. With your follow-up journey doing the heavy lifting, you stay on their radar without becoming 'that agent who pesters'.

Think long-term. Today's "not yet" is tomorrow's instruction.



### Toolkit tip

Send automated follow-up journeys based on each appraisal to save time and stay consistent.

APPRAISAL LISTINGS / APPRAISAL OVERVIEW

9 St. Quentin Close, Sheffield S17 4PL

Hannah Ward

1 Pre-appointment 2 Insights 3 Presentation creation 4 Nurtured journey

**Market update reports** Save

Market Update Reports for this vendor is based on the criteria shown below. This was originally the criteria used to search for comparable properties, and used in this presentation, but it can be updated here at any time.

☐ Mix Hannah Ward: Opt out of Market Update emails

**Property details**

Postcode:

Radius:

Property Type:

Bedrooms:

Min price:

Max price:

**Email updates**

Email frequency:

Duration:

☒ The vendor will receive their first email on 18th July 2025 and then every 3 weeks thereafter, continuing for 3 months. ×

**Email template**

Nurture Email Template ▼

**Email subject line**

Your Market Update

**Email content**

17 words tiny

☒ Send an SMS as well as email

**SMS content**

Please enter 160 characters or less. / 160

**Date**

**Activity**

Save

## The impact of effective follow-up in UK estate agency

### Speed and consistency make a real difference

Vendors often invite more than one agent to appraise their property, but many instructions are won simply by being the first to follow up. Consistency then builds trust.

### 80% of instructions go to the first agent who follows up

This widely reported industry rule of thumb is reinforced by behavioural trends seen across major portals and CRM providers. Following up fast shows professionalism, interest, and efficiency.

[Property Road: Estate Agent Statistics UK](#)

### Agents who follow up consistently see up to 200% higher conversion rates

Structured workflows and timely nudges (not just one call and a brochure) can dramatically improve win rates.

[Property Road: Tips & Stats](#)

### Six follow-up touchpoints is the sweet spot

While many agents stop after 1-2 attempts, research suggests the majority of engagement (especially for hesitant vendors) comes after the fourth contact.

[Social: Real Estate Lead Conversion Statistics](#)



“We win more instructions when we stay consistent. Just one check-in a week with helpful info keeps us front of mind – and it doesn’t feel salesy when it’s valuable.”

**Brand Manager,  
Yorkshire**

If you're first to follow up, and you keep following up (with useful, relevant content), you're significantly more likely to win the instruction. Our Marketing Toolkit can automate much of that, so you don't lose touch or momentum.



# The iamproperty difference™

By working with iamproperty, you're not just turning up with a smile and a brochure - you're turning up with an ecosystem of tools, data and support behind you. Tools that help you stand out at each stage make a real difference.



## Marketing toolkit - Data

With property data for all UK residential properties and competitor analysis make smarter, faster decisions.



## Marketing Toolkit - Market Appraisal Module

From pre-appointment emails and live presentations to post-app nurture - you're covered.



## CRM

Maximise your day-to-day. Streamline your Appraisal and Compliance processes, eliminate admin, and simplify data entry.



## Digital Onboarding

Reduce hassle, boost peace of mind.



## Legal Preparation & Premium Conveyancing

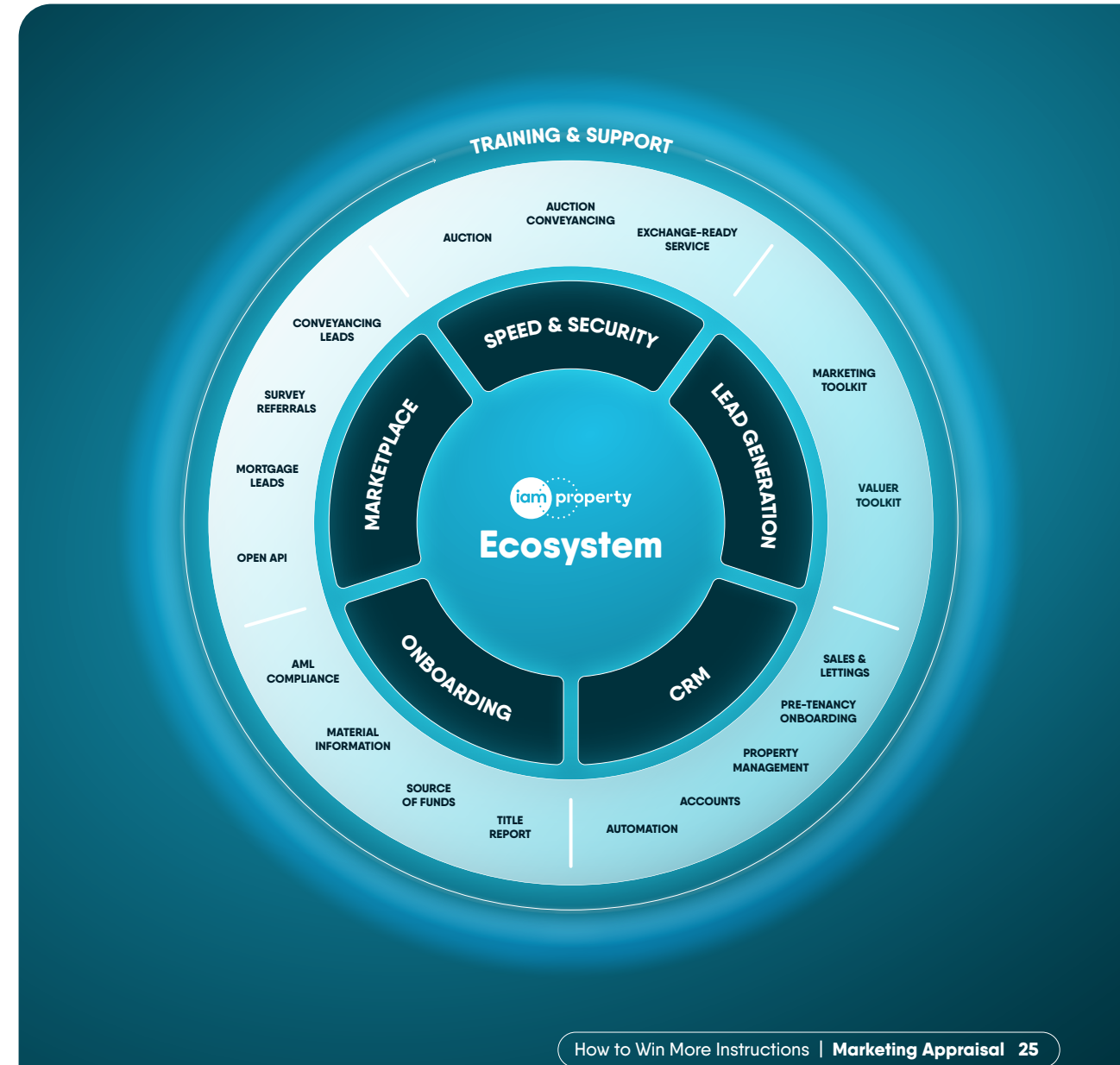
Reduces delays, improves sales outcomes.



## Modern Method of Auction

Helps you win the vendor who needs speed and security of sale.

When you have the tools to do more, you can win more - without needing to work harder.



# Summary

**In today's competitive property market, the market appraisal is more than just a step in the process - it's your make-or-break moment.**

With vendors doing more research, asking tougher questions and expecting a seamless experience, standing out takes more than charm and local knowledge. It takes preparation, personalisation and the right tools behind you.

We've covered the three key stages that set top-performing agents apart:

1

## Before the appointment

Preparation is everything. From branded pre-appointment emails with integrated surveys to local market insights and property-specific data. The more you personalise your approach, the more trust you build before you even walk through the door.

2

## In the room

Vendors want confidence, clarity and proof that you can deliver. A data-backed pitch, brought to life with interactive proposals and local performance benchmarks, helps you show - not just tell - why you're the right choice.

3

## After the appointment

The follow-up is where most instructions are won or lost. Timely, consistent, value-led communication keeps your agency top of mind. With structured journeys and helpful updates, your brand sticks - without chasing.

## Why it matters

- + Instructions are increasingly going to the agent who follows up first - and best.
- + Vendors expect more digital fluency, more insight, and more support than ever.
- + Having the right ecosystem of solutions behind you means you don't need to work harder, just smarter.

## The iamproperty difference™

Our ecosystem helps you manage every touchpoint of the journey, with tools that save time, impress vendors and drive results. From onboarding, legal prep and speedy sales methods to standout presentations and automated nurture - everything's built to help you win more instructions, more often.

**Ready to sharpen your appraisals and win more instructions?**

**Book a demo of our Market Appraisal module or explore the full ecosystem.**







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