

**Verbal report**

Property Address:

Job reference:

Client:

Date of inspection:

Date of verbal report:

Time of report:                    to

Name of person spoken to:

<b><u>Opening comments/ customer care</u></b>	<b><u>Tick</u></b>	<b><u>Comment</u></b>
Confirm who you're talking to		
Check it's a good time to talk		
Give an estimate of the time required for the conversation		
Explain the purpose of the call		
Confirm details will be confirmed in a written report		
Give an estimate of when the report will be sent		
Explain that the client should not act on the verbal report but that it is hoped it will make the report more easily understood		
Explain that the written report takes precedence		
Explain that comments are restricted to the terms and conditions of the service		
Initial comment positive in nature		
Explain how the conversation will be structured		
Leave a contact number and offer to discuss matters further once the client has received the report		
<b><u>Report (be friendly, confident and authoritative)</u></b>		
Explain the need for any further reports and put this in to context with regard to services		
Avoid answering the question "Should I buy it"		

Avoid direct responses to questioning on the cost of repairs		
Ensure appropriate responses to questioning on condition ratings if report not yet finalised		
Ensure appropriate responses to questioning on recommendations for contractors		
Carefully consider responses to questioning on proposed alterations		
<p><b>Prepare a checklist of points to be covered</b>, eg.  Chimneys, roof, walls, windows and doors,  floors, structural movement, dampness, the  services, alterations or extensions,  environmental factors, pavings, boundaries etc:</p> <p><u>List Below:</u></p>		

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Record any additional points discussed or relevant issues

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## Notes:

### Before you pick up the phone

1. Run through your notes, give yourself some time for reflective thought on your overall view of the property.
2. Make a list of the key points you want to refer to, so that you can tick these off as you discuss matters with the client.
3. Consider whether you are in a position to provide a verbal report at this stage. For instance you may not yet have made all your enquiries of the agent, or the location, your thoughts on value may not yet have crystallised. In most instances you should be aware that you are probably going to need time to finalise all your enquiries and you may have to resist pressure from the client to call them a.s.a.p. Remember that what you first say will probably stick quite firmly in the clients mind, and could take considerable effort to dislodge, if subsequent information meant you had to back track. Particular care needs to be taken when meeting clients at the property. There is a big advantage in being able to explain things face to face, but you're also exposed to being caught on the hop when you're thoughts aren't fully formed, so possibly one to resist unless you have significant experience under your belt.
4. Check the instructions to ensure that no additional services beyond the standard terms have been agreed. This should have been done before your inspection, but double check.

### Your opening shots

1. Check your contact numbers, confirm that who you are talking to is your client. Numbers for vendors and clients can get confused, and there have been instances where verbal reports have accidentally been given to the vendor! (not good, a schoolboy error, I really should have known better!)
2. Introduce yourself, be friendly and check that now is a good time to talk.
3. Give a rough estimate of how long you anticipate the conversation taking.
4. Explain at the outset that the purpose of the call is give an initial heads up following your inspection, and will be limited to the main issues and concerns. Explain that the details will be confirmed in a written report. Give an estimate of when they can reasonably expect to receive the report.
5. Explain that you are required to highlight that they should not act on your verbal report, and that the written report takes precedence. It is however the intention that an initial chat may help to make the report more easily understood. Explain that you are required to confine your comments to the terms and conditions of the service that you are undertaking (i.e. Condition Report, Homebuyers Report, Building Survey).
6. Be confident and speak with authority.

### Your comments

1. If you can, open with something positive. Your client may well be nervous and anxious about what you're about to deliver. Inevitably most of what we focus on tends to be negative, but this will probably be a big decision for your client and they've seen something in the property that makes them want to buy it. Don't "Gild the Lilly" though, if it's one of those occasions where you have serious concerns about the wisdom of continuing to purchase, you don't want to distract attention from the key points you're about to make. So a fine line to tread, but in the vast majority of cases, you'll be able to make a positive comment to start with.
2. Briefly explain how you are going to structure what you'll say, and that it is a summary of the main issues/concerns, to try and avoid the client jumping in and taking you off at a tangent, i.e. the main structural elements, chimneys, roof, walls, windows and doors, floors, structural movement, dampness, the services and then other peripheral issues if necessary, previous alterations or extensions, environmental factors, pavings, boundaries etc.. Don't feel the need to describe all the materials and the constructional form these are matters for the report.
3. Give an initial indication of whether further reports will be advised, and with regards to services explain the context, that as surveyors we aren't able to undertake tests, and that unless recent certificates are available further reports are always recommended. You may of course be able to make additional comments on the basis of your inspection, but it's a good opportunity to put this in context so that when they see the written report the message isn't skewed by these elements.
4. Your client will nearly always want to know your view on value, and often will ask whether they should be negotiating on the sale price for certain items that may have jumped out to them from issues you've raised. If your valuation hasn't been finalised you need to explain this and don't be drawn into further discussions. Explain that the report will give a market value that reflects the apparent condition from a visual inspection at the time of inspection, but that this could change once any further investigations recommended in the report have been commissioned or estimates obtained and that certain issues may only come to light once the property is vacated. Explain that we don't get involved in negotiations.
5. The "would you buy it" or "should I buy it" question. You will get asked this countless times and it has to always be "I'm afraid I can't answer that", the appeal or interpretation of concerns or defects is inevitably subjective so it's one you've always got to politely duck.
6. Don't be drawn in to discussions about the likely costs of works for repairs unless this has been agreed as an additional service; explain that we advise obtaining quotes for all works prior to a commitment to purchase. The reason I often give is that these can vary wildly according to availability of contractors in the area and existing contract commitments they may have.
7. Don't be drawn in to discussions about alterations or extensions that are proposed by the client unless additional terms have been agreed. Politely explain that such advice is beyond the terms of reference and where further advice may be obtained i.e. a local Building Surveyor or Architect, the local authority, the Planning Portal web site etc.
8. Avoid discussing condition ratings at this point unless your report has been finalised.

9. Avoid recommending contractors for works, although you may make reference to approved federations i.e. Property Care Association, Wood Protection Association, Gas Safe, NICEIC, ECA, OFTEC etc.
10. Finish by explaining that once they have read the report, if they have further concerns or queries that they are welcome to give you a ring to discuss these further and leave a contact number.

### **Notes**

1. Make a record of your conversation. The checklist at the outset is a good way of keeping yourself on track, but make sure you record any additional items discussed and attach these to your site notes for subsequent filing.