



Script Ideas for Intake Video Calls



- ☎ Include your DPM if at all possible. Don't forget to smile and be friendly, warm and welcoming!
- ☎ DISCUSS General information
- ☎ Discuss **ONLY THOSE TASKS THAT YOU HAVE BEEN HIRED TO DO- See Program Confirmation**

Beginning of intake/first video call

- This is _____ with IOR Global Services / I know you're probably speaking to a LOT of different people right now about your upcoming move to _____. Just to briefly explain how IOR plays a role during your relocation, IOR partners with **RMC NAME** and we have local consultants all over the world who support employees directly with their Destination Services. I will assist you directly with your Destination Services and be your local expert in _____.
- My understanding from **AUTHORIZER @ RMC (CLIENT)** and **DPM @ IOR** is that you have been authorized for LIST TASKS HIRED TO DO Destination Services. These tasks are spread over a course of weeks/months, and will be prioritized based on your arrival date and immediate needs. Any questions around the services authorized?
- Although I have some of the information about you (and your family's) move, I would like to confirm some additional details to ensure we are meeting your needs in your new town.
- "Have you ever lived in the US before/or first international move?"
- "Is your visa finalized and/or when will you arrive in the _____area?"
- Temp housing Authorized (y/n)
 - If yes -> Confirm Temp housing (location/dates only confirmed after travel is confirmed)
 - If no -> Estimated Arrival/final move to location (will family be arriving on same day?)
- "Will you be using a rental car upon arrival?"



Discuss ONLY THOSE TASKS THAT YOU HAVE BEEN HIRED TO DO- See Program Confirmation

- **Area Tour/Community Orientation** “IOR wants to ensure we are customizing the services to you and your family’s specific needs.”
 - “Are there any medical concerns we should be aware of up front?”
 - “It is important to introduce you (and spouse/children) into your new community, are there any interests/hobbies or special considerations you’d like for us to keep in mind?”
- **Settling In Support**
 - Discuss what takes place 2 or so business days after their arrival. SSN/Banking; **pre arrival checklist** will help them prepare documents (email it to them after the meeting)
 - If the EE is agreeable to online banking, tell them you will be emailing them an introduction to Stanford Credit Union, Eagle Bank or HSBC in case they want to sign up for banking before arrival.
 - Inform the EE that getting the Driver’s License or State I.D. doesn’t take place until end of program (after they have an SSN/ residency at their permanent address). Will driving lessons be needed?
- **Rental Assistance/School Support**
 - If there are children of school age:
 - Explain that Rental Home Finding and School Search often go “hand-in-hand” due to school districts/catchment areas for public schools. (i.e. the rental home address determines the school district/catchment area).
 - Address and note any school questions. Offer to send information about the school choices and ratings if they are unsure of how to proceed.
 - School districts if any research has been done?
 - Familiarity with the new location? Desired communities if any research has been done?
 - Counsel them on rental home market in a positive manner- such as: tight market, qualifying for rental, houses hard to find etc.
 - Confirm or ask for budget—is it realistic? Include utilities?
 - Confirm if needed: Spouse? children?
- **Confirm Housing Parameters:**
 - Type of property (bedrooms/bath/ amenities/ washer-dryer/ garage)
 - House, town house, apartment
 - Ask about desired commute to office (car/public transit)
 - Discuss plans for furniture rental/purchase
 - Pets?
 - What are the EE’s deal breakers or must haves?





- **Confirm: DSC will do research on your behalf (w/ support of realtor or not) and:**
 - Send you links to properties
 - Set up appointments for property viewings (# accompanied/unaccompanied).
 - **If EE wants a Single-Family Home that is being represented by a real estate agent/realtor, explain the Tenant Representation Agreement:**
 - Using a real estate agent during the rental search will provide you with the most comprehensive rental options as well as streamline the process.
 - There have been recent changes to the guidelines governing how real estate agents operate, effective as of August 17th. These changes may impact how your real estate agent is compensated.
 - You may now be asked to sign a Tenant Representation Agreement before your real estate agent is able to show you any rental properties.
 - It is an agreement which means that you are agreeing to work with the real estate agent which is stated in the Agreement.
 - The terms will be stated in the Agreement and will list a period for which the Agreement is effective, the area it covers and the compensation due to the Tenant's (your) real estate agent.
 - Should you contact other agents on your own you may be asked to sign a Tenant Representation Agreement. **Please do not sign anything without first checking with me. Each agreement may mean you have a financial liability to owe a commission to more than one agent.**
 - The real estate agent will be owed the compensation outlined in the Agreement. This commission may be paid to your real estate agent by the landlord. However, if the landlord does not agree to pay this commission, you will be responsible for payment to the real estate agent who assisted you.
- **If the EE is interested in an apartment at a managed building, the form may NOT be required as this may be a different process.**
 - Confirm procedures: Once you identify a property, DSC will assist with:
 - Application process
 - Internal non-legal lease summary review
 - Property Condition Report
 - Utilities
- "Are there any questions/concerns for me at this time that we haven't covered?"
- "(Client Authorizer)" and "(IOR DPM)" will be in copy on all e-mails between us as we are working together as a team, so if you have any questions or concerns, please don't hesitate to reach out to any of us during this stressful time. Safe travels!"

Recap After Destination Services Intake Call

EMAIL TEMPLATE-SENT FROM A Pro (modified by you to fit your EE tasks required)



Hello _____,

It was a pleasure to speak with you and discuss your Destination Services. Please keep me updated on visa status. I have you arriving for the week of the _____.

I have recapped below:

Work Location	
Status of Visa	
Final Arrival Date	
Length of Assignment	
Temporary/Corporate Housing	
Anticipated Rental Search Dates	
Style/Type of Rental	
Preferred Size (Bed/bath/sq ft)	
Monthly Rental Budget	
Desired Lease Term/Start Date	
Community Preferred	
Max. Commute Time	
Adults/ Children Accompanying	
Pets (number, type, breed, weight)	
Washer/Dryer in Unit	

Rental housing search:

- I wanted to recap the subject of the Tenant Representation Agreement that you may be required to sign to view properties with a real estate agent:
 - Using a real estate agent during the rental search will provide you with the most comprehensive rental options as well as streamline the process.
 - There have been recent changes to the guidelines governing how real estate agents operate, effective as of August 17th. These changes may impact how your real estate agent is compensated.
 - You may now be asked to sign The Tenant Representation Agreement before your real estate agent is able to show you any rental properties.
 - It is an agreement which means that you are agreeing to work with the real estate agent which is stated in the Agreement.
 - The terms will be stated in the Agreement and will list a period for which the Agreement is effective, the area it covers and the compensation due to the Tenant's (your) real estate agent.
- 
- 
- Should you contact other agents on your own you may be asked to sign a Tenant Representation Agreement. Please do not sign anything without first checking with me. Each agreement may mean you have a financial liability to owe a commission to more than one agent.
 - The real estate agent will be owed the compensation outlined in the Agreement. This commission may be paid to your real estate agent by the landlord. However, if the landlord does not agree to pay this commission, you will be responsible for payment to the real estate agent who assisted you
 - If you are interested in an apartment at a managed building, the form may NOT be required as this may be a different process.
 - You are welcome to send me listings you want to view. Based on your criteria and budget, I will schedule appointments and send an agenda to you in advance of the showings. To ensure you don't miss a great opportunity, you might be viewing some of the showings independently.
 - When you find a rental property you like, you will start the rental application process (usually online) and pay the application fee. The approval process can take 1-4 days. I am available to assist you if you have any questions.

- Once your application is approved, the Landlord or Property Management Company will send you the lease to review and sign. Please request a PDF lease document. BEFORE you sign the lease, IOR will review the lease within 4 business hours of receiving it. **Some companies require their approval before you are to sign the lease.
- Once IOR has reviewed the lease, I will email you the Lease Summary and review with you.
- You will sign the lease and the landlord or property management company will ask for the security deposit and first month's rent. The lease is not fully secured until this money is paid.
- Before you move in, I will complete the Property Move-In Condition report and take photos to document a baseline condition and ensure that appliances are working properly. This report will protect you from being charged at move-out for damage present before move in and/or note any repairs that need to be made. The Landlord/leasing agent should be present.
- Please email me the final signed lease to save in our protected electronic files.
- I can provide you with rental property application assistance, lease review, and Property Move-In support, even if you find a property on your own.

Prepare to have:

1. Letter of employment with salary, housing allowance if applicable, and bonus verification. Sometimes a few recent pay stubs may be requested.
2. Money available for the background check fee (~\$40-60/per adult), application fee, security deposit, and first month's rent. Amounts and requirements will vary. Cash and often credit cards are typically not accepted.
3. A quick decision on a property you like, as it may be gone if you delay. If a property is suitable, we recommend you start the application process immediately.

If applying for SSN in the U.S., please see: [SSN Procedure and Identity Theft Protection](#).

Please let me know if you have any questions – I'm looking forward to helping you get settled in _____.

