



Destination Services Consultant 101

Always...

- Send intro email (template)
- Use correct subject line with assignee name and client, CC authorizer and DPM
- Send summary email of Intake Call within one business day after the call with Pre-Arrival Checklist and other sample docs that apply (update status report)
- Send agenda with everyone in copy
- Send follow up email after docs first FTF meetings to obtain feedback, especially after showing properties (template)
- Follow up WhatsApp calls and texts with summary email, copy authorizer and DPM
- Update Status Report throughout communication and for each task with hours
- Ask for lease draft to complete the non-legal lease summary (email, CC authorizer and DPM)
- Ask assignee to “share” signed lease
- Use Out of Office for emails when on vacation or unavailable for a period of time
- Send Closing Email (template)

NOTE: it is strongly recommended to assign a trusted real estate agent to assist with sourcing rental properties

Schedule...

- Schedule follow up after visa appointment to confirm arrival dates (update status report)
- If time permits, schedule second call pre-arrival one week before to confirm documents needed and timeline for tasks
- Schedule bank appointment the first business day or two after arrival
- Schedule day/time for Social Security and meet assignee at SSA office if possible. Make sure before date to remind assignee of all forms needed
- Schedule follow up to confirm receipt of Social Security card
- Schedule home search and be clear if you cannot meet an appointment to explain WHY and follow up after the appointment. Always put in an email to the assignee, CC authorizer and DPM
- Schedule Property Inventory. If you cannot attend, explain WHY and send Walk Thru Tips and follow up (email, CC authorizer and DPM)
- Once receipt of fully executed lease and other proof of residency required plus SSN card, ask permission to schedule DL appointment. Accompany assignee. If time does not permit in program or you are not available, send an email and explain WHY you cannot accompany, make sure assignee has all documentation, and follow up after appointment to ensure the assignee passed