Client Call Framework

What To Say When The Phone Rings During A Showing, Meeting, Or Closing

The Professional Rule

A ringing phone is not automatically an interruption. It is a moment where people see your standards. The right response depends on who is with you, who is calling, and whether the issue is urgent.

Why This Handout Exists

This handout ties directly to the INVISIQ lesson, **If You Don't Answer Your Phone, Someone Else Will.** The lesson teaches that professionalism is not proven by slogans. It is demonstrated through habits, timing, expectation management, and how you treat people when competing priorities appear.

The mistake many agents make is treating every phone call the same. A call during a casual showing is not the same as a call during a closing. A call from an active client under contract is not the same as a brand-new lead. A true professional knows the difference.

Use This As A Framework - Not Legal Advice

Real estate duties vary by state, brokerage, contract status, and client relationship. Use this framework to improve professionalism and expectation management, while following your brokerage policies and local rules.

The Five-Step Decision Filter

• **1. Identify the person in front of you.** Are you with a prospect, active client, buyer, seller, investor, or closing party?

• **2. Identify the caller.** Is the caller an active client, another client under contract, a vendor, lender, title company, cooperating agent, or new lead?

• **3. Classify urgency.** Is this time-sensitive, transaction-sensitive, safety-related, or routine?

• **4. Set a clear expectation.** If you cannot talk, say exactly when you will call back.

• **5. Follow through.** Your callback promise is part of your professional reputation.

Core Standard

Do not make the person in front of you feel ignored. Do not make an active client feel abandoned. Use clear, calm language and explain your standard of service.

Scenario Framework: Showing Appointment

A showing is client-facing, but it usually allows more flexibility than a closing. The key is to excuse yourself briefly, classify the call, and return attention to the person with you.

Situation	What To Say To The Person With You	What To Say To The Caller	After The Call
Active client under contract calls while you are with a prospect	*"Would you excuse me for about thirty seconds? This is an active client under contract, and I always answer when an active client may need me."*	*"I am with another client at a showing. Is this urgent, or can I call you back in about twenty minutes?"*	*"Thank you for your patience. When you are under contract, you will receive that same level of responsiveness."*
New lead calls while you are with an active client	*Do not make your active client compete for your attention. If needed: "I am going to silence this and return it when we finish."*	*Let it go to voicemail, or send a quick text later: "I am with a client and will call you at [time]."*	*No long explanation needed. Return focus to your active client.*
Lender, title, inspector, or cooperating agent calls during a showing	*"This may affect an active transaction. Give me thirty seconds to see whether it is urgent."*	*"I am at a showing. Is this time-sensitive for the transaction, or can I call you shortly?"*	*If urgent, explain briefly. If not, return to the showing and call back at the promised time.*
Personal or non-urgent call during a showing	*Do not answer. Silence the phone.*	*No response during the appointment unless there is a true emergency.*	*Stay present. Professional attention is part of the service.*

Showing Appointment Principle

At a showing, your job is to stay present while still protecting active transaction responsibilities. A brief, explained interruption can demonstrate professionalism. A careless interruption damages trust.

Quick Showing Script

"I apologize for the interruption. That was connected to an active transaction. When clients are under contract, time-sensitive issues sometimes need immediate acknowledgment. If we work together, you will receive that same standard of care."

Scenario Framework: Closing Appointment

A closing is different. The client in front of you is completing a major financial transaction. Your phone should be silent or on vibrate. Only time-sensitive transaction issues should interrupt the room.

Situation	What To Say To The Person With You	What To Say To The Caller	After The Call
Active client at the closing table; new lead calls	*Do not answer. Your client is closing. They are the priority.*	*Let it go to voicemail. Return the call after closing: "I was at a closing and can speak now."*	*No apology needed to the room because you did not interrupt the closing.*
Another active client under contract calls during closing	*"I apologize. This may be a time-sensitive contract issue for another client. I need sixty seconds to confirm whether it requires action."*	*"I am at a closing table. Tell me in one sentence whether this is urgent. If not, I will call you at [time]."*	*"Thank you. I only step out at closing for issues that may affect an active transaction."*
Title company, lender, or attorney calls during closing	*If related to the closing, answer or step aside as directed. If unrelated: "I will return this as soon as closing is complete."*	*"I am in a closing. Is this related to the closing happening now, or can it wait until [time]?"*	*Keep the interruption short and transaction-focused.*
Personal or non-urgent call during closing	*Do not answer. Do not explain unless asked.*	*No response until closing is complete.*	*Your behavior should reinforce that the closing client has your full attention.*

Closing Appointment Principle

At a closing, the bar for interruption is much higher. The default is silence, presence, and focus. Only a true time-sensitive transaction issue deserves a brief interruption.

Before Every Appointment

Set your phone to vibrate before the meeting starts.	Tell active clients your availability when you know you will be unavailable.
Use voicemail that sounds professional and current.	Return calls exactly when promised.
Create a quick text template for callback expectations.	Do not over-explain. Calm confidence beats nervous rambling.
Know your brokerage policy on communications and client duties.	Document important client communications when appropriate.

Professional Reminder

The goal is not to answer every call at all costs. The goal is to demonstrate judgment. Professionals manage attention, urgency, and expectations.

One-Page Practice Guide

Use this simple ladder when your phone rings during an appointment. It will keep you from reacting emotionally or looking unprepared.

Priority Level	How To Think About It
Highest Priority	**The person in front of you during a closing or active transaction moment.** They deserve focus unless another transaction has a genuine urgent issue.
High Priority	**An active client under contract with a time-sensitive issue.** Acknowledge quickly, classify urgency, and set a callback window.
Medium Priority	**Vendors, lenders, title, inspectors, cooperating agents.** Answer only if the call may affect an active transaction or current appointment.
Lower Immediate Priority	**New leads and routine calls.** They matter, but they do not outrank active client responsibilities. Return promptly and professionally.

Three Scripts To Memorize

To excuse yourself briefly: *"Would you excuse me for about thirty seconds? This may involve an active client under contract."*

To classify the call: *"I am with a client right now. Is this urgent, or can I call you back at [time]?"*

To teach the standard afterward: *"Thank you for your patience. When clients are in an active transaction, I take that responsibility seriously. If we work together, you will receive the same level of care."*

Key Takeaway

Professionalism is not answering every call blindly. Professionalism is knowing when to answer, when to wait, what to say, and how to make every person involved feel respected.

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