

## Part 2: Customers and Clients of PTA-Consultants

Providing a basic consultation is an opportunity to reach more property owners. In the first level of consultation, you meet a prospect, a referral source, or a future lead. The second and third levels of consultation are customer-related (paid services), while the fourth is client-based services with a formal engagement.

For purposes of this training, a Property Tax Assessment Consultant's customers and clients are defined as the following:

### *Customer*

- a customer seeks information.
- a customer is a "Do it yourself" (DIY) property owner.
- You make no calls or communications on behalf of a customer.

### *Client*

- a client engages.
- a client is looking for representation.
- You perform all appeals due to diligent activities on behalf of a client.

A customer or client can be a **homeowner, an investor, an estate trustee, or a property manager**.

This part of the course shows how you, as a trained Property Tax Assessment Consultant, can provide appeal services to a homeowner as a customer or client, offering pricing tips at each of the four service stages. The first step is getting to know the prospect's intentions. Sometimes, they already know they want to appeal and are ready to enter an engagement. In this case, you still want to verify if there is a reasonable or legitimate argument for an appeal before you engage.