

Moving Families Initiative® Written Game Plan™

Game Plan to be Prepared by Customer's Moving Families Initiative® Preferred Real Estate Agent®

Moving Families Initiative® Written Game Plan™

Frequently Asked Questions (FAQ)

1. What is The Moving Families Initiative®?

The Moving Families Initiative® (MFI) is an international program focused on serving, protecting, and meeting the needs of parents moving or relocating with children, ages 19 and younger, including the teachers and coaches who work with their children.

2. How is the Moving Families Initiative® and the World Class Coaches® Servant Business Model™ connected?

World Class Coaches® (WCC) is an international personal, professional and executive coaching company which practices and teaches basic fundamentals as part of its coaching delivery processes. World Class Coaches® serves as the facilitator for the Moving Families Initiative®. In the World Class Coaches® Servant Business Model™, business relationships are built on three things; consumer needs, goals, and timing.

3. Who are the Moving Families Initiative's® Customers?

U.S. Census data indicates that more than 10 million children between the ages of newborn and 19 years old move or relocate throughout the United States annually. The Moving Families Initiative® serves this large demographic.

The Initiative's services are customized to fit the specific needs of these children and their parent(s) based on the following age groups of the children: Newborn –Four, Five – 14, and 15 – 19 years old.

Many of our Initiative parents have several things in common. Among the top commonalities are: 1) Their chosen fields or professions require them to move frequently and repeatedly.

2) They have children ages 19 years old or younger when they move or relocate their families. 3) Often, a single parent must move in advance of the rest of the family.

Our commitment to serve and meet the needs of Initiative parents' entire families, with a specific focus on their children, extends to the children's aunts and uncles, grandparents, great grandparents and extended families. Each of these family members is considered a Moving Families Initiative® customer, and we will refer to them as 'customers' going forward throughout the Moving Families Initiative® Written Game Plan™ [hereafter MFI Written Game Plan™].

4. What are the goals of The Moving Families Initiative®?

The Initiative's Goals are built around three key words: Serve – Protect – Empower. The Initiative seeks to serve the families' needs in the following ways:

- Assist children in dealing with the physical and emotional challenges of moving at no cost to their parents or to the teachers or coaches who work with their children.
- Provide protection to the Initiative's customer's entire family during periods of transition and change in their lives with a specific focus on protection for their children.
- Encourage and assist children to become more active in extracurricular activities of their choice.
- Ensure that no Initiative customer moves or relocates his/her family without developing and executing a free Moving Families Initiative® Written Game Plan™ to assist in achieving the customer's and the Initiative's goals.

5. What is the role of the Moving Families Initiative® Preferred Real Estate Agent™ in developing and executing the MFI Written Game Plan™?

Written game plans are not new in certain sectors of society. In the sports world, a coach would never allow a professional athlete, or his team, go into a game without a written game plan.

One of our objectives with the Moving Families Initiative®, is for no Initiative customer to move or relocate his or her family without a MFI Written Game Plan™ prepared by an MFI Preferred Real Estate Agent™ who serves as the Initiative Customer's Trusted Advisor.

The game plan is designed to assist Initiative customers in identifying and meeting all their real estate needs and in achieving their goals when they move or relocate their families via a "One-Stop Shop" process. Our aim is for Initiative customers to meet all their needs and achieve all their goals with one click, or one phone call, to the Moving Families Initiative® Connectivity Platform™.

With this "One-Stop Shop" process, our objective is for the MFI Preferred Real Estate Agent™ to become the Initiative Customer's "Coach", much like the coach to a professional athlete and the rest of his/her team. The MFI Preferred Real Estate Agent™ will assist the Initiative customer in developing and executing the MFI Written Game Plan™. Meeting all the Initiative customer's needs with a specific focus on protection for the parent's children is the role of the MFI Preferred Real Estate Agent.

6. What is the basis for the MFI Written Game Plan™?

In the World Class Coaches® Servant Business Model™, business relationships are built on consumer needs, goals, and timing.

Initiative customers have some specific requirements based on their needs, goals, and timing. The basis for the MFI Written Game Plan™ is built on the Trusted Advisor understanding and developing

a written game plan to assist Initiative's customers in meeting their needs and achieving their goals within the needed timeframe.

The MFI Written Game Plan™ is built on the premise of asking oneself the following question: If you're working with a customer as a Trusted Advisor and you don't know "What, When, Where, Why, Who, and How," about them, how can you best help them?

In the World Class Coaches® Servant Business Model, we refer to this process as the 5W's and H-Factor Technique. Constant and consistent assessment, with all the focus squarely on understanding the needs, goals, and timing of the customer during periods of transition and change, serves as the basis for the MFI Written Game Plan™. The 5W's and H-Factor Technique serves as the procedure to assist Trusted Advisors in assisting customers in successfully preparing and executing the MFI Written Game Plan™.

The Initiative's services are selected to fit the specific needs, goals and timing of the customer. There is a special emphasis on families, especially those with children in the following age groups: Newborn – Four, Five – 14, and 15 – 19 years old.

7. What are some of the questions and topics that MFI Preferred Real Estate Agents™ will be discussing with Initiative families?

Residential Transition Checklist

The following is a partial list of the Moving Families Initiative® customer's Residential Transition Checklist of "Yes and No" questions to be completed by Initiative's customers when moving or relocating. HSF Affiliates Home ConnectionsSM will choose several of these questions to review with the parent(s) prior to placing the referral opportunity with a Referral contact. All questions should be reviewed by the MFI Preferred Real Estate Agent™ as part of the qualifying process.

The initial website inquiry form consists of only a few brief fields:

- First Name:
- Last Name:
- Name of Spouse/Significant Other (Optional):
- Email Address:
- Phone:
- Best time to contact:
- Are you working with a real estate agent?
 - IF YES:
 - Name of Agent:
 - Brokerage Name/DBA:
- Comments:

Home ConnectionsSM will review the following questions (#1-11) which focus on the moving and service needs of the customer and will provide this foundational information to the brokerage when placing the referral:

1. Do you own the home you are leaving? Yes; No
 - a. If Yes: Will you be selling the property you are leaving? Yes; No
2. Will you be purchasing a property in your new location? Yes; No
 - a. If Yes: Within what time frame would you like to purchase a new home? 0-6 months; 6-12 months; 12-24 months
 - b. If Yes: Do you need to sell the home you are leaving before you purchase your new home? Yes; No
 - c. If Yes: Will you need a home mortgage loan to assist you with the purchase of your new home?
 - d. If No: Do you need assistance finding temporary housing, a rental property or leasing? Yes; No
3. Whether purchasing or renting, will you need the services of a preferred, licensed agent to assist you with your insurance needs? Yes; No
4. Will any family member(s) move to your new destination/home before the rest of your family? Yes; No
5. Will any family member(s) remain in your current location/residence after your family moves to your new location? Yes; No
6. Do you have children between the ages of newborn and 19-years old who will move with you to your new location? Yes; No
 - a. If Yes: Please indicate how many children you have in the following age groups
 - Newborn – Four (4)
 - Five (5) --14
 - 15 --19
7. Would you like assistance finding the right school(s) for your children in your new location? Yes; No
8. Prior to your move, did any of your children participate in any school supported extracurricular activities (music, clubs, sports, etc.)? Yes; No
9. Are any of your children planning to participate in any school supported extracurricular activities after you move into your new home? Yes; No
10. Prior to your move, did any of your children participate in any non-school supported extracurricular activities (such as AYSO Soccer, golf or others)? Yes; No
11. Are any of your children planning to participate in any non-school supported extracurricular activities after you move into your new home? Yes; No

The Moving Families Initiative® Preferred Real Estate Agent™ may use or adapt the following set of “Yes and No” questions (#12-24) to further probe for information that will aid in meeting the family’s needs.

Note: Some of these questions may uncover needs that can be fulfilled by providers or services available to families on the Moving Families Initiative® Connectivity Platform, and will help you to prepare the MFI Written Game Plan™.

12. Prior to this move, have you previously moved or relocated with one or more of your children between the ages of Newborn – 19 who are still presently living with you at home?
13. Will any of your children need any type of special accommodations in their new school(s)?
14. Have you decided how your children will be traveling from home to school and back each day?
15. Will you have any licensed teen student drivers in your household once you move into your new residence?
16. Are any of your children planning on becoming a licensed teen student driver within 12-36 months of moving into your new home?
17. Will any of your children be graduating from high school within 12-36 months from the time you moved into your new residence?
18. Are any of your children planning on starting college within the next two – four years from the time you move into your new home?
19. Are any of your children planning on graduating from college within the next two – four years from the time you move into your new residence?
20. Prior to your move, did you (mom/parent) participate in any volunteer, school, or community extracurricular activities?
21. Are you (mom/parent) planning on participating in any volunteer, school, or community extracurricular activities after you move into your new residence?
22. Prior to your move, did you (dad/parent) participate in any volunteer, school, or community extracurricular activities?
23. Are you (dad/parent) planning on participating in any volunteer, school, or community extracurricular activities after you move into your new residence?
24. Comments:

8. What will the Preferred Real Estate Agent® do with this information?

Any information gathered from the Residential Transition Checklist during initial interaction with the Initiative customer will be provided to the Moving Families Initiative® Preferred Real Estate Agent® who will use it along with the information they gather during their own consultation with the Initiative customer, to customize the MFI Written Game Plan™.

- a) The Moving Families Initiative® Preferred Real Estate Agent™ coaches the Initiative's parent through the process of taking steps to achieve each element of the game plan.
- b) For example, if one of the children participates in soccer; one of the steps in the game plan will be to connect Initiative's parent with the local soccer organization when the moving family arrives in their new home. The purpose is to immediately get the child signed up to play soccer in their new community and immediately begin the process of developing new friends on common ground.

9. What are the needs of the Initiative parents/customers in terms of homeownership and renting?

Initiative customers as Renters and Homebuyers/Homeowners

World Class Coaches® business relationships are based on three things: Consumer needs, goals, and timing. This is certainly the case with the Initiative's customers when it comes to renting, leasing, or purchasing or selling.

Many Initiative's customers own homes and prefer home ownership; however, the nature of their needs to move or relocate may affect the timing in which they purchase or sell.

For example, college coaches, or college professors may change universities and when they do, they often will need to relocate immediately to begin work at their new school. The spouse may remain behind at their old location with their children preparing the family to move at a later date. The coach or professor may need temporary housing in the new city until their spouse arrives and before they will purchase a home in their new location. The timing in which they may consider purchasing or selling a home could range from 30 days - 24 months. Often, Initiative customers do purchase, but it's all driven by their needs, goals and timing.

Customers' Needs and Challenges

While we cannot fulfill all of the needs of families dealing with the challenges of moving, it is important to keep their circumstances in perspective. Here is what WCC has learned from Moving Families Initiative® consumer groups about the needs and challenges Initiative families experience during periods of transition and change in their lives when they move or relocate.

Among the personal priorities expressed by the Initiative's parents are:

- Support and reducing stress for their children
- Sustaining the marriage, relationship and family
- Maintaining their career paths
- Retaining old relationships

- Building new relationships
- Helping children retain and make new friendships

The importance of the Initiative is that it addresses many of these key priorities and reinforces the Initiative customer's ability to successfully move the family. Initiative customers have told us that during this period, they have a number of specific needs. They have a particular need for guidance related to many aspects of the moving process.

At the location they are departing, they need assistance in:

- Pricing/selling their home
- Terminating leases
- Disconnecting utilities
- Negotiating insurance issues
- Defining moving company plans and schedules
- Defining school departures
- Collecting medical records from doctors
- Defining departures from jobs/careers

From the new location perspective, they require guidance on:

- Finding/ purchasing a new home
- Mortgage negotiations
- Relocation options
- Insurance issues
- Temporary living and rental assistance
- Connecting utilities
- School information

10. Greatest challenges that kids face when moving

A sense of loss and separation from people (relatives, neighbors, friends), places and things and the frustration and anger that comes with not having the emotional maturity to adjust to this loss - for young children, the normal process of separation can be interfered with, causing them to return to a more dependent relationship with their parents.

Susceptibility to a wide range of emotions: depression, loneliness, anger, changes in appetite, social withdrawal, irritability, sleep disturbances, fear, all from the stress associated with loss and interruption.

Interruptions / disruptions in schedules, routines, friendships, and not having the maturity to deal with this and what they miss.

Insensitive parents who may not understand children's sense of powerlessness and the absence of a sense of safety. These parents need resources to help them and these children need parents to normalize things and make sense of their feelings.

A misunderstanding that the chaos and frustration that their parents exhibit is their fault.

Confusion stress and anger if they have not been successful making new friends.

The "new kid" syndrome which can bring on bullying or being bullied.

Falling grades and adjustment to changes in curriculum. There are often negative effects on learning.

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In summary, one of our goals with the Moving Families Initiative® is for no Initiative's customer to move or relocate their family without an MFI Written Game Plan™ prepared by an MFI Preferred Real Estate Agent™ who serves as the customer's Trusted Advisor.

The game plan is designed to help Initiative customers in meeting their needs and in achieving their goals when they move or relocate their families via a "One-Stop Shop" process with one click of their computer mouse or one phone call to the Moving Families Initiative® Connectivity Platform™.

With this "One-Stop Shop" process, our aim is for the MFI Preferred Real Estate Agent™ to assist the Initiative customer in developing and executing the MFI Written Game Plan™ as their Trusted Advisor in meeting all their needs. The better we achieve this goal, the better we serve, protect and empower the Initiative customer's entire family.

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