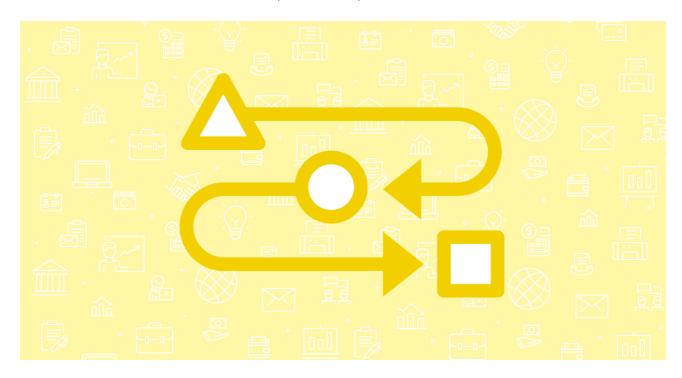
Onboarding Checklist: Real Estate Client (Buyer)

Use this real estate client information onboarding checklist to make sure your new client's needs can be met, understood, and obtained.



GATHER CONTACT INFORMATION/FIRST STEPS

GATHER CONTACT INFORMATION/FIRST STEPS
Name
Name:
Address:
Email:
Phone:
Address
Best contact information
Create welcome packet
Send out welcome packet and necessary documents
Ask for a pre-approval letter (if needed)
Recieve pre-approval letter (if needed)
GENERAL BUYER QUESTIONS TO ASK BUYER
Are you selling a property as part of this process?
Do you currently rent or own?
Are there any additional buyers?
When would you like to move?

Area interested in?	
Style of home?	
Price range?	
Number of bedrooms?	
Number of bathrooms?	
Square feet?	
Wish list items?	
Absolute nos?	
NEXT STEPS	
Research MLS	
Research private listings	
Create an email with potential homes (make sure homes meet criteria and	d wish list items)
Send an email with potential homes	
Ask for feedback	
Set up showings	
Attend open houses	
Regroup after each showing	
Search MLS for additional listings	Make and Share Free Checklists checkli.com