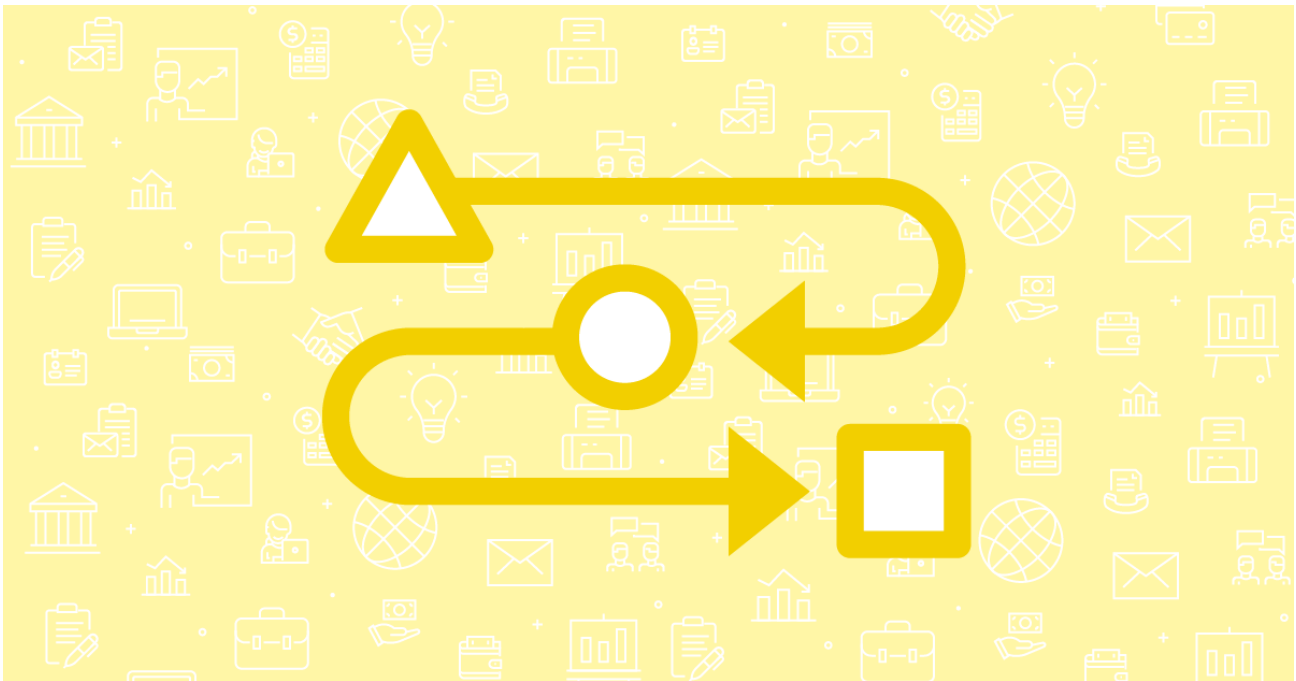


# Onboarding Checklist: Real Estate Client (Buyer)

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

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 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