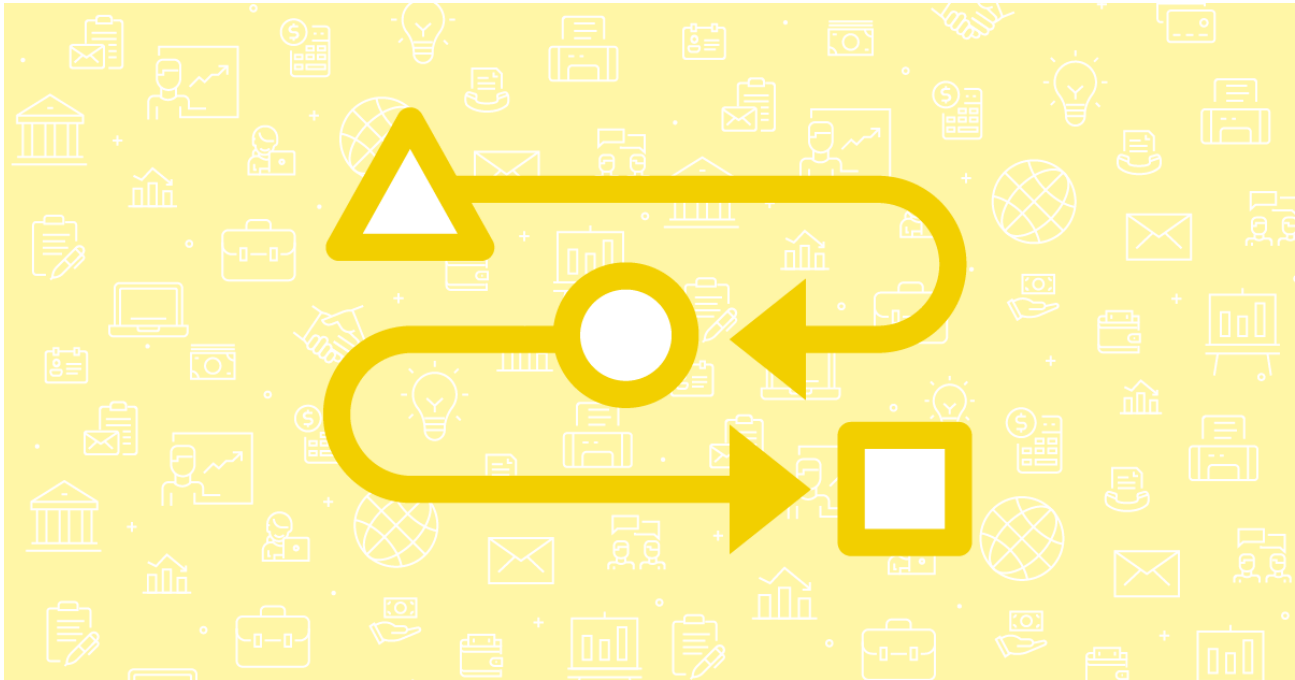


Onboarding Checklist: Real Estate Client (Buyer)

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

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