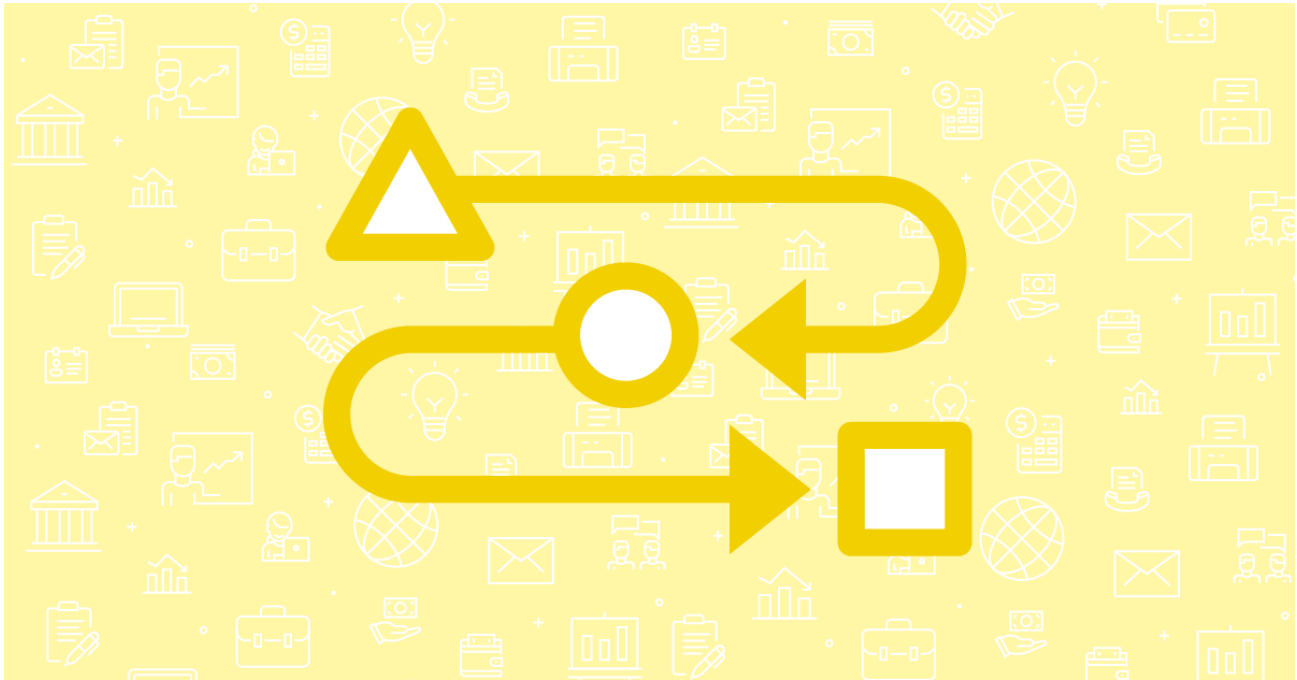


Onboarding Checklist: Real Estate Client (Buyer)

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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