

Committed Buyer Checklist

For	Company
Client	Date acquired
Date called	Appointment Date:
Open house	Address
Work phone ()	Home phone ()

CLIENT SOURCE:
 Open House.....a
 Floorcall.....b
 Jelly Bean Jar.....c
 Cold Call.....d
 Farm.....e
 Mailout.....f
 Community.....g

Let me review with you how I work. I don't work with every potential buyer, but the clients I do engage with, MUST be committed to producing results.

PHASE ONE - BUYER INTERVIEW

YES NO **WE HAVE AGREED:**

- 1. To have all decision makers present in person.
- 2. To spend at least 45 minutes in interview.
- 3. To come to an agreement on what you're looking for.
 (1) _____
 (2) _____
 (3) _____
- 4. That I am your exclusive agent and I represent you.
- 5. (Buyers agreement attached)
- 6. That you will be **pre-approved** by _____ for \$ _____
- 7. That you are prepared to buy now.
- 8. Date/time of next appointment.

- 9. That we will be in communication.
- 10. Buyer is prepared to make a decision on property and to make an offer.

PHASE TWO - SHOWING PROPERTY

Again, I don't work the way most agents do. I only want to show you properties that are meaningful and fit your needs.

- 1. Pre-write offer and have on clipboard before showing property.
- 2. Show 3 properties.
- 3. Bring back to office for debriefing.
- 4. Write offer.(Go to 3A)
- 5. Re-interview to redefine needs and identify where communication broke down.(Go to 3B)

PHASE 3A- SHOWING PROPERTY

- 1. Pre-write offer and have on clipboard.
- 2. Present offer.
- 3. Countered.
- 4. Accepted.
- 5. Set financing appointment and give completed file to escrow specialist.

PHASE 3B-SHOWING PROPERTY

- 1. Re-establish needs _____
- 2. Identify what got in the way _____
- 3. Show 3 properties.
 (1) _____
 (2) _____
 (3) _____
- 4. Bring back to office for debriefing.
- 5. Write offer.
 (Go to 4A)
- 6. Make appointment with manager (date/time) _____(Go to 4B)

PHASE FOUR4A - MANAGEMENT SUPPORT

- 1. Pre-write offer and have on clipboard.
- 2. Present offer.
- 3. Countered.
- 4. Accepted.
- 5. Set financing appointment and give completed file to escrow specialist.

PHASE 4B-MANAGEMENT SUPPORT

- 1. Re-establish relationship with manager present.
- 2. Identify what got in the way with managers assistance.
- 3. Show 3 properties.
 (1) _____
 (2) _____
 (3) _____
- 4. Bring back to office for debriefing.
- 5. Write offer.(Go to 5A)
- 6. Discontinue working with client.(Go to 5B)

PHASE 5A

- 1. Present offer.
- 2. Countered.
- 3. Accepted.
- 4. Set financing appointment and give completed file to escrow specialist.

PHASE 5B

- 1. Help client understand that he/she is not a buyer now. Establish when they are.
- 2. Put on follow-ups and mailing list.



QUANTUM MANAGEMENT SYSTEMS

©1999 QUANTUM MANAGEMENT SYSTEMS AND DOUGLAS M. YEAMAN
 All Rights Reserved
 BYRCHKLST QHT.p65

© Quantum Management Systems and Douglas M. Yeaman 2000,2001,2002,200
 All rights reserved. May not be reproduced without permission