

Committed Buyer Checklist

Agent Name

Client

Date acquired

Date called

Appointment Date:

Comment:

Work phone ()

Home phone ()

CLIENT SOURCE:

Open House.....a
Floorcall.....b
Jelly Bean Jar.....c
Sign Call.....d
Farm.....e
Mailout.....f
Internet.....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 FOUR 4A - 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
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