New Client Questionnaire

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Company: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date for Appointment #1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**1**. How long have you been in Real Estate?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2**. Where does most of your business come from?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you track it? **Yes or No** What systems do you track it in?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**3**. What % of transactions are Buyers \_\_\_\_\_Listings \_\_\_\_Rentals\_\_\_\_\_\_Investors\_\_\_\_\_\_Builders\_\_\_\_\_

**4.** Do you geographically farm? **Yes or No** Where?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How many homes? \_\_\_\_\_\_\_ Is your farm updated? \_\_\_\_\_\_\_\_Do you need a fresh one?\_\_\_\_\_\_\_\_\_

How many deals have you closed in your farm in the past 12 months? \_\_\_\_\_\_\_\_\_\_\_\_\_\_

What is your goal in the next 12 months?\_\_\_\_\_\_\_\_\_\_\_\_

**5**. What CRM are you using for your Past Clients and Sphere Of Influence? \_\_\_\_\_\_\_\_ How many people in your SOI and past clients (guess)? \_\_\_\_\_\_\_\_\_Deals produced from SOI in 12 months? \_\_\_\_\_\_\_\_\_\_\_

**6**. Are you on Facebook? \_\_\_\_\_\_Instagram\_\_\_\_\_\_\_LinkedIn\_\_\_\_\_\_\_Twitter\_\_\_\_\_\_\_\_Other\_\_\_\_\_\_\_\_

How many deals generated from Social Media in the past 6 months?\_\_\_\_\_\_\_\_\_\_\_\_

Challenges with Social Media:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**7**. **I am going to ask you questions about your business generating activities and how many deals you generate per year from each**:

Snail Mail: Do you send out a marketing piece monthly to your Farm/SOI/ past clients? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Any appointments generated?\_\_\_\_\_\_\_\_\_\_\_ Deals:\_\_\_\_\_\_\_\_\_\_\_\_\_

Emails: Do you email your sphere monthly? **Yes or No** Any appointments generated?\_\_\_\_\_\_\_\_ Deals:\_\_\_\_\_\_\_\_\_

Call: How often do you prospect over the phone each week?\_\_\_\_\_ Any appointments generated?\_\_\_\_ Deals:\_\_\_\_

Door knock: Are you door knocking? Any appointments generated?\_\_\_\_\_\_\_\_\_\_\_ Deals:\_\_\_\_\_\_\_\_\_\_

Open house: How many Open Houses do you do monthly? \_\_\_\_\_\_\_ Any appointments generated?\_\_\_\_\_\_\_\_\_ Deals:\_\_\_\_\_\_\_\_\_\_\_\_\_\_How many open house signs do you have: #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Online activity: How many leads do you get monthly from being online? \_\_\_\_\_\_ Through which site?\_\_\_\_\_\_\_\_\_\_

Referral Biz: How many leads do you get monthly from your referrals? \_\_\_\_\_\_\_\_\_\_ What’s your goal?\_\_\_\_\_\_\_\_\_\_

Technology: What tech products are you signed up with?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Inventory Marketing: Do you micro farm around your listings? **Yes or No** Buyers: **Yes or no**

Any appointments generated?\_\_\_\_\_\_\_\_\_\_\_\_\_ Deals:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**8**. What is your goal # for transactions sold this year? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What is the # of transactions you closed last year? \_\_\_\_\_\_\_\_\_\_\_\_ **The # difference is :\_\_\_\_\_\_\_\_\_\_\_**

**9**. Do you have a coach or mentor?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Do you have an assistant?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you have a TC?\_\_\_\_\_ Do you have a listing coordinator?\_\_\_\_\_\_ Do you have a buyer’s agent?\_\_\_\_\_\_

What’s your goal with your team?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What challenges or changes do you have in your business?\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**10**. What is important to you in your title/escrow service? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\*\*\*Do you have any questions for me?\*\*\* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_