



Real Estate Agent Buyer Inquiry Support Checklist 2026

Initial Inquiry Reception & Logging

Procedures for capturing lead details, source tracking, and timestamping the incoming inquiry via CRM or email.

Inquiry Date

Inquiry Time

Lead Name

Contact Information (Email/Phone)

Lead Source

- ☐ Website Contact Form
- ☐ Zillow/Real Estate Portal
- ☐ Social Media Advertisement
- ☐ Referral
- ☐ Walk-in/Phone Call

Initial Inquiry Notes

Write something...

Screenshot of Original Inquiry/Email

 Upload File

Lead Qualification & Discovery

Standardized questions to determine buyer budget, preferred location, property type, timeline, and financing readiness.

Buyer Name

Write something...

Maximum Budget Range

Enter a number...

Preferred Property Type

- ☐ Single Family Home
- ☐ Condo/Apartment
- ☐ Townhouse
- ☐ Multi-family
- ☐ Land/Lot

Must-Have Features

- ☐ Number of Bedrooms
- ☐ Number of Bathrooms
- ☐ Garage/Parking
- ☐ Swimming Pool
- ☐ Backyard/Garden
- ☐ Finished Basement

Specific Area or Neighborhood Requirements

Write something...

Desired Move-in Date

Enter date...

Client Profile & Preference Documentation

Steps to update the buyer's profile with specific 'must-have' vs. 'nice-to-have' features and lifestyle requirements.

Primary Buyer Name

Write something...

Maximum Budget Limit

Enter a number...

Preferred Property Types

- ☐ Single Family Home
- ☐ Condo/Apartment
- ☐ Townhouse
- ☐ Multi-family
- ☐ Land/Acreage

Essential Features

- ☐ Swimming Pool
- ☐ Home Office
- ☐ Garage
- ☐ Gated Community
- ☐ Finished Basement

Specific Lifestyle Requirements

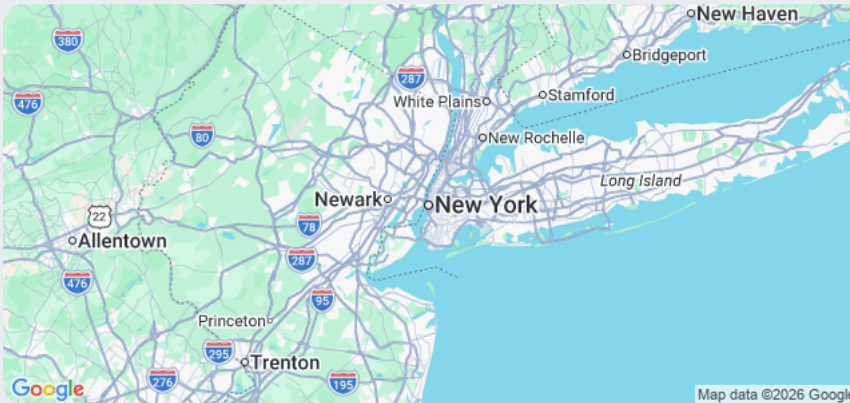
Write something...

Target Move-in Date

Enter date...

Preferred Neighborhoods/Zip Codes

 [Set My Current Location](#)



Pre-Approval Letter

 [Upload File](#)

Automated & Manual Follow-up Sequence

Protocol for sending immediate acknowledgment, scheduled follow-up intervals, and personalized property suggestions.

Initial Response Method

- ☐ Email
- ☐ SMS/Text
- ☐ Phone Call
- ☐ WhatsApp

First Follow-up Scheduled Date

Enter date...

Follow-up Tasks Completed

- ☐ Introduction Email Sent
- ☐ Market Report Delivered
- ☐ Property Alerts Enabled
- ☐ Phone Call Completed

Follow-up Summary & Notes

Write something...

Days Since Last Contact

Enter a number...

Property Match & Listing Distribution

Workflow for searching the MLS, vetting current listings against buyer criteria, and sending curated property alerts.

Matching Property Criteria

- ☐ Price Range
- ☐ Property Type (Single Family, Condo, etc.)
- ☐ Minimum Bedrooms
- ☐ Minimum Bathrooms
- ☐ Specific Neighborhoods

Matching Listing ID/MLS Number

Write something...

Date Listing Sent to Buyer

Enter date...

Delivery Method

- ☐ Email
- ☐ SMS/Text Message
- ☐ In-Person Presentation
- ☐ Client Portal Update

Personalized Property Notes

Write something...

Property Feature Sheet / PDF

 Upload File

Viewing & Showing Coordination

Logistics for scheduling property tours, coordinating with listing agents, and preparing buyer property packets.

Scheduled Showing Date

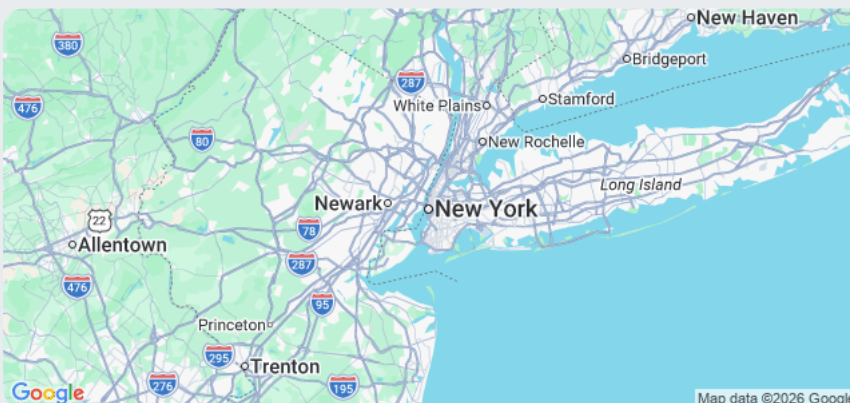
Enter date...

Scheduled Showing Time

Enter time...

Property Address for Showing

 Set My Current Location



Attendees Present

- ☐ Buyer
- ☐ Co-Buyer/Spouse
- ☐ Real Estate Agent
- ☐ Mortgage Broker

Showing Type

- ☐ In-Person Tour
- ☐ Virtual Video Tour
- ☐ Drive-by Inspection

Post-Showing Buyer Feedback

Write something...

Property Disclosure Documents

 Upload File

Feedback Loop & Objection Handling

Process for documenting buyer feedback after showings and addressing concerns regarding price, location, or condition.

Date of Property Viewing

Enter date...

Primary Objection Type

- ☐ Price/Budget
- ☐ Location/Neighborhood
- ☐ Property Condition
- ☐ Layout/Floor Plan
- ☐ School District

Detailed Client Feedback Notes

Write something...

Features Requiring Modification

- ☐ Kitchen/Appliances
- ☐ Outdoor Space
- ☐ Bedroom Count
- ☐ Square Footage

Next Action Plan

Write something...

Agent Verification

Nurture & Long-term Engagement

Strategies for keeping 'cold' leads engaged through market updates, neighborhood reports, and seasonal newsletters.

Lead Nurture Frequency

- ☐ Daily
- ☐ Weekly
- ☐ Bi-Weekly
- ☐ Monthly

Content Delivery Channels

- ☐ Email Newsletter
- ☐ SMS/Text Updates
- ☐ Phone Call
- ☐ Direct Mail/Postcards
- ☐ Social Media Retargeting

Next Follow-up Topic

Write something...

Next Scheduled Engagement Date

Enter date...

Client Interest Notes

Write something...

CRM Update & Lead Status Transition

Final steps for moving the lead through the sales funnel (e.g., from 'New Inquiry' to 'Active Buyer' or 'Closed').

Updated Lead Status

- ☐ New Inquiry
- ☐ Contacted/Attempted
- ☐ Qualified/Active Buyer
- ☐ Nurturing/Long-term
- ☐ Not Interested/Closed

Last Contact Date

Enter date...

Interaction Summary

Write something...

Next Steps Required

- ☐ Schedule Showing
- ☐ Send Pre-approval Check
- ☐ Send New Listings
- ☐ Follow up in 30 days

Updated Pre-Approval Letter

 Upload File

< Previous

> Next

✔ Finish

🔧 Generate Sample Report