

# Checklist: The First Conversation with a New Lead



## Make a strong introduction

The first and last few minutes of a phone conversation are the most memorable to the consumer. Have a smooth yet strong introduction that includes an energetic greeting, your name, and your brokerage.



## Exude warmth

Ultimately, the buyer is looking to connect on a personal level with the agent they're trusting to walk them through this process. Focus on service and connection.



## Schedule an appointment

Ask for an appointment within the first two minutes of the conversation. The earlier an appointment is secured, the higher the likelihood of conversion. Explain your role as a buyer's agent and the value you offer.



## Discuss location

Ask discovery and rapport-building questions about the building or neighborhood and what compelled the prospect to inquire about it. Identify their needs and wants to ideally book additional showings.



## Discover their motivation

Ask questions that lead you to the “why” behind the buyer’s intended purchase — a growing family, expiring lease, new job, desire for outdoor space, etc. Get an idea of their timeline, too.



## Show your expertise

Educate your buyer throughout the call. Point out intricacies that may not be obvious to them (co-op vs. condo, maintenance fees, debt-to-income ratio, etc.). Keep things informative, but brief.



## Avoid uncomfortable questions

Asking if the buyer is pre-approved or working with another agent can convey that they’re potentially wasting your time. Approach these topics from a service perspective: “Have you thought about financing?” “Have you gone out to see properties before or will this be the first time?”



## Outline next steps

Repeat the desired appointment window. Verbalize any additional information you’ll be sending and how you’ll confirm the appointment (text, e-mail or call). If possible, secure a time to meet just before the showing to walk in together as a unified front.



## Repeat your information

Before ending the call, give your closing sentiments and repeat your name and brokerage.