



The Ultimate Guide to the Real Estate Professional Questionnaire



VYKON.US





Success in real estate isn't just about closing deals—it's about building a strong, scalable business that thrives in any market. This Real Estate Professional Questionnaire is designed to help you assess key aspects of your business, from lead generation and client management to marketing strategies and productivity systems.

By taking a closer look at how you attract clients, nurture relationships, and streamline transactions, you'll gain valuable insights into what's working and where there's room for improvement. Use this guide to identify opportunities for growth, refine your processes, and create a business strategy that sets you apart from the competition.

Whether you're a seasoned agent or looking to take your business to the next level, this structured approach will help you sharpen your skills, optimize your workflow, and achieve long-term success in real estate.

Let's dive in and build a stronger, more profitable business—one smart strategy at a time.

V Y K O N . U S



Modern Real Estate Professional Questionnaire
Building a High-Performance Real Estate Business

Client & Database Management

1. Do you use a CRM to manage your contacts?

☐ Yes

☐ No

☐ If yes, which CRM do you use?

2. How many contacts are currently in your database?

◦ ☐ (Approximate number)

3. How do you stay in touch with past clients and leads? (Check all that apply)

☐ Email Drip Campaigns

☐ Social Media Engagement

☐ Text Messaging

☐ Phone Calls

☐ Personalized Mailers

☐ Other: _____

4. How often do you reach out to your sphere of influence?

☐ Weekly

☐ Monthly

☐ Quarterly

☐ Annually

☐ Other: _____

Marketing & Lead Generation

5. What are your primary lead generation sources? (Check all that apply)

- ☐ Online Ads (Google, Facebook, Instagram, etc.)
- ☐ Referral Network
- ☐ Social Media Content (Organic)
- ☐ Open Houses
- ☐ Networking Events
- ☐ Email Campaigns
- ☐ Other: _____

6. Do you use video marketing in your strategy?

- ☐ Yes, regularly
- ☐ Occasionally
- ☐ No, but I'd like to start
- ☐ No, not interested

7. Which social media platforms do you actively use for your business? (Check all that apply)

- ☐ Facebook
- ☐ Instagram
- ☐ LinkedIn
- ☐ YouTube
- ☐ TikTok
- ☐ Other: _____

8. How do you nurture online leads? (Check all that apply)

- ☐ Automated Email/Text Sequences
- ☐ Retargeting Ads
- ☐ Live Follow-Up Calls
- ☐ Social Media Engagement
- ☐ CRM Task Reminders
- ☐ Other: _____

Client Experience & Transactions

9. Do you have a system for guiding buyers and sellers through the process?

☐ Yes

☐ No

☐ If yes, briefly describe: _____

10. How do you ensure a smooth transaction process? (Check all that apply)

☐ Transaction Coordinator

☐ Digital Signing Software (DocuSign, etc.)

☐ Clear Client Onboarding Process

☐ Regular Status Updates

☐ Closing Gifts & Follow-Ups

☐ Other: _____

Business & Personal Growth

12. Do you have a written business plan for this year?

☐ Yes

☐ No

If yes, when was the last time you reviewed it? _____

13. What are your top 3 business goals for the next 12 months?

14. What are your top 3 personal growth goals?

Referral & Partnership Strategy

15. Do you have a system for generating referrals?

- ☐ Yes
- ☐ No
- ☐ If yes, briefly describe: _____

16. Do you have a preferred lender or strategic partner?

- ☐ Yes
- ☐ No
- ☐ If yes, do you collaborate on marketing?
 - ☐ Yes
 - ☐ No

17. Do you host events or community engagement initiatives to grow your network?

- ☐ Yes
- ☐ No
- ☐ If yes, what types of events? _____

Time Management & Productivity

18. Do you use a time-blocking system to manage your day?

☐ Yes

☐ No

☐ If yes, what tasks do you block time for? _____

19. Do you leverage automation and AI tools for efficiency? (Check all that apply)

☐ Chatbots/AI Assistants

☐ Automated Email Marketing

☐ CRM Automations

☐ AI-Powered Market Reports

☐ None, but I'd like to start

Final Thoughts

20. What is your biggest challenge in growing your real estate business?

21. What is one thing you'd like to improve in your business this year?

Ready to Elevate Your Business?