

# ■ Bird Dog Self-Assessment & Onboarding Form

## ■ Personal Information

Full Name: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
City/State: \_\_\_\_\_ Preferred Contact: \_\_\_\_\_

## ■ Section 1 – Skill Discovery

Skill	1	2	3	4	5
Talking to sellers on the phone					
Meeting people at events / meetups					
Writing emails or DMs					
Posting and replying on social media					
Speaking on camera (video, reels, ads)					

Where do you feel strongest? \_\_\_\_\_

Where would you like to improve? \_\_\_\_\_

## ■ Section 2 – Marketing & Tech Skills

Area	Experience Level	Notes / Tools
Social Media		
Lead Magnets / Funnels / CRM		
Online Advertising		
Driving for Dollars Apps		
Data Research / Skip Tracing		

Do you have a marketing budget? Yes ■ No ■ If yes, how much? \$\_\_\_\_\_

## ■ Section 3 – Lead Types You Plan to Find

■ Distressed / Vacant ■ Foreclosures ■ Probate ■ FSBO ■ Landlords ■ Wrap Buyers  
■ Multifamily ■ Private Lenders ■ Other: \_\_\_\_\_

## ■ Section 4 – Knowledge & Readiness

Have you studied any real estate training? Yes ■ No ■

Do you understand terms like ARV, equity, or assignment? Yes ■ No ■

Do you have investors to send leads to? Yes ☐ No ☐ Need Help? ☐  
Do you understand payment is after closing? Yes ☐ No ☐

## ■ Section 5 – Personal Goals & Motivation

Why do you want to start bird-dogging? \_\_\_\_\_  
Hours per week available: \_\_\_\_\_  
Monthly income goal: \_\_\_\_\_  
Do you plan to grow into wholesaling or partnering? Yes ☐ No ☐

## ■ Section 6 – Commitment

I commit to ethical lead sourcing, accuracy, and transparency.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_