

■ 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: _____