

# Buyer's Tracking Form

Date \_\_\_\_\_

## Type of Lead

☐ Duty Call ☐ Email ☐ Open House ☐ Referral ☐ Other \_\_\_\_\_

Name \_\_\_\_\_  
(his/hers) \_\_\_\_\_ Phone \_\_\_\_\_

Email \_\_\_\_\_  
Address \_\_\_\_\_ Phone \_\_\_\_\_

## Time Frame/Must Haves

☐ Now ☐ 1-3 mo ☐ 3-6 mo ☐ 6-12 mo ☐ Year + Other \_\_\_\_\_

Do you have a home to sell first? ☐ Yes ☐ No Is it listed? ☐ Yes ☐ No

Address \_\_\_\_\_

Have you been pre-approved? ☐ Yes ☐ No Lender \_\_\_\_\_

Monthly note are you comfortable with? \_\_\_\_\_ Area you are looking in \_\_\_\_\_

Looking in a certain school district? \_\_\_\_\_

How many sq ft? \_\_\_\_\_ How many bedrooms? \_\_\_\_\_ Baths? \_\_\_\_\_

Lot size? \_\_\_\_\_ Large backyard? \_\_\_\_\_ Pool? \_\_\_\_\_

What age home? \_\_\_\_\_ New construction? \_\_\_\_\_

Move-in ready? \_\_\_\_\_ Will do some minor updating? \_\_\_\_\_

## Client Follow-up

Buyer's first interview/meeting Date: \_\_\_\_\_ Time: \_\_\_\_\_

Follow up details. Goal is to contact at least 6 times in 2 weeks.

Text=T Email=E Call=C

|    | Date | T/E/C | Details |
|----|------|-------|---------|
| 1) |      |       |         |
| 2) |      |       |         |
| 3) |      |       |         |
| 4) |      |       |         |
| 5) |      |       |         |
| 6) |      |       |         |