



W.H.A.L.E. Eligibility Checklist -- Get this information in your CRM!

Full Name:	Company:
Phone:	Email:
Website URL:	City & State:
Productivity Rank: A B C	Relationship Level: 1 2 3 4 5

Notes on what you already know:

LinkedIn URL:

Facebook Business URL:

IF THEY HAVE A WEBSITE --

1. What kind of mortgage information are they offering on their website?

2. How is their Home Search page set up on their website?

3. How is their Home Values page set up on their website?

4. Who built their website?



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5. How many listings do they have?

None | 1-2 | 3-5 | 6-8 | 9-12 | 13-15 | 16+

Notes:

6. What kind of marketing are they doing online?

Email | Blog | Social | PPC | SEO | Video | Other

Notes:

7. What kind of marketing are they doing offline?

Mailers | Magazines | TV | Radio | Other

Notes:

8. Additional Notes:
