

## 1 Book the instruction

Thank them for the call, sign post the agenda of the call, let them know the call may last 10-15 minutes to enable us to deliver a full service and remember to use your personality to gather the information below.

Full name (Vendor 1)		Full name (Vendor 2)	
How would you prefer me to address you?		Telephone	
Telephone		Mobile	
Mobile		Work	
Work		Email	
Email		Postcode	
Property address (to be sold)		Postcode	
Is the property your personal dwelling?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
Correspondence address (if different from above)		Postcode	
Does anyone else have a legal interest in the property?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
Will they be there?		Yes <input type="checkbox"/> No <input type="checkbox"/>	
A lot of our business is through recommendations, I am curious, of all the agents why us? <small>(If no referrals, confirm marketing source)</small>			

### Seller's 'why'

Why you are thinking of selling?

When did you last buy or sell a property?

Where are you looking to move to and how is your property search going so far?

Register as applicant? Yes ☐ No ☐

When did you last have the property valued? (if recently by who?)

On the day of the appointment do you have any other appointments we need to work around, such as school pick ups, work meetings etc.

Rapport notes for pre-call: Have you found out the seller's profession or a key rapport builder for your PMC i.e. New baby on the way/diary etc.

### Property information

Just before we confirm a day, imagine you are at the front of the

Notes

Tenure Freehold

Ground rent £

Have you made any improvements?

What attracted you to buy the property?

It sounds like you have a price in mind

Probe further if more information is

Type Terrace E  
Bungalow F

Style (e.g. Victorian)

Age of property

Outside space (e.g. Back garden, pond)

Parking Driveway Allocate  
Other

### GDPR Consent

Are you happy that we keep you updated?  
Just to let you know, haart are part of a team that may help you with your move. We never share your details within our family?  
Are you happy that we keep you informed?

Now I have gathered all this information but can I ask what are you looking for from the move?

### Appointment confirmation

Thank you for all the information. Let's go ahead and book the appointment.

Appointment date & time:

Booked by (Print name and location)

# 1 Book the Instruction

HRT

Thank them for the call, sign post the agenda of the call, let them know the call may last 10 -15 minutes to enable us to deliver a full service and remember to use your personality to gather the information below.

Full name (Vendor 1)	Full name (Vendor 2)
How would you prefer me to address you?	
Telephone	Telephone
Mobile	Mobile
Work	Work
Inform them we will be e-mailing them before and after the appointment, so please confirm best email address	
Email	Email
Property address (to be sold)	
	Postcode
Is the property your personal dwelling? Yes <input type="checkbox"/> No <input type="checkbox"/>	
Correspondence address (if different from above)	
	Postcode
Does anyone else have a legal interest in the property? Yes <input type="checkbox"/> No <input type="checkbox"/> Will they be there? Yes <input type="checkbox"/> No <input type="checkbox"/>	
A lot of our business is through recommendations, I am curious, of all the agents why us? <small>(If no referrer, confirm marketing source)</small>	

## Seller's 'why'

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Rapport notes for pre-call: Have you found out the seller's profession or a key rapport builder for your PMC i.e. New baby on the way/divorce etc.



## Property information

Just before we confirm a day and time, I just need to get some information from you regarding the property so I can provide a full service. Can you imagine you are at the front door of the property and then start describing it to me.

Notes

Tenure ☐ Freehold ☐ Leasehold ☐ (If leasehold)  
Years remaining on lease \_\_\_\_\_ years  
Ground rent £ \_\_\_\_\_ Service charge £ \_\_\_\_\_ Do you own a share of the freehold? Yes ☐ No ☐

Have you made any improvements you think may have added value?

What attracted you to buy the property/what are its best features? Tell a story of a customer we have helped sell a similar property (build rapport)

It sounds like you have a price in mind? £ \_\_\_\_\_

Probe further if more information is needed

Type ☐ Terrace ☐ End-of-terrace ☐ Mid-terrace ☐ Semi-detached ☐ Detached ☐  
☐ Bungalow ☐ Flat ☐ Cottage ☐ Other \_\_\_\_\_

Style (e.g. Victorian) \_\_\_\_\_ Bedrooms 1 2 3 4 5 6 Bathrooms 1 2 3 4 5 6

Age of property \_\_\_\_\_ Reception rooms 1 2 3 4 5 6 Conservatory Yes ☐ No ☐

Outside space (e.g. Back garden, pond, etc)

Parking ☐ Driveway ☐ Allocated ☐ Permit ☐ Single garage ☐ Double garage ☐ None ☐

Other \_\_\_\_\_ Spaces 1 2 3 4 5 6 Do you have any pets ☐

## GDPR Consent

Are you happy that we keep you updated about properties that come to the market? Yes ☐ No ☐

Just to let you know, haart are part of a family of companies that offer a wide range of property related services that may help you with your move. We never share data with outside organisations, however are you happy for us to share your details within our family? Yes ☐ No ☐

Are you happy that we keep you informed of market and relevant news from our family? Yes ☐ No ☐

Now I have gathered all this information I know why you want to move and where you want to go and some information on your property but can I ask what are you looking for from me as your agent to allow me to deliver a full service for you.

## Appointment confirmation

Thank you for all the information. Let's get you booked in the diary.

Appointment date & time: \_\_\_\_\_ Property marketing consultant: \_\_\_\_\_

Booked by (Print name and location) \_\_\_\_\_ Date \_\_\_\_\_

As part of our full service I would like to do a cost of moving meeting with you with (use your mortgage brokers name) this is to discuss all of the cost related to your property and the potential onward purchase, would you be opposed to me booking this now for after your appointment.

Appointment date

Appointment time

Brokers name

### Set to win the instruction

If you are happy with everything discussed during your appointment, are you happy to put your property on the market with us? Y ☐ N ☐

### Introduce FLINK™ & confirm pre-appointment email

Could I ask, do you use social media? Facebook ☐ Instagram ☐ Twitter ☐

Great, during our appointment we will tell you about our unique social media marketing tool FLINK™ that markets your home across all main social media platforms. I'll send you a short introductory video so you can see how we can use it to get the best price for your home.

### What would be the best email to send that to?

Great thank you, I'll also send you confirmation of the appointment time, the details of properties we have sold in your area and a link to our google reviews. We would also like to drop an information pack to you, which contains an introduction to our team, the service we offer and an agenda for the meeting.

Could we drop this to you this evening? Yes ☐ No ☐ Agreed information pack delivery time:

Would you be happy to view the information before we come round? Yes ☐ No ☐

Fantastic. Everything is booked in for you, do you have any questions for us at the moment?

## 2 Prepare to make the pre-instruction call

### Prepare market research

Demand report generated	Yes <input type="checkbox"/>	Number of applicants:	Best price guide report generated	Yes <input type="checkbox"/>
Legal costs prepared	Yes <input type="checkbox"/>	FS Diary	Sold examples	Yes <input type="checkbox"/>

### Hand deliver the information pack

Pack delivered Yes ☐

### Pre-instruction call

Good morning / afternoon. It was great to meet you yesterday, I'm sorry that I couldn't stay any longer but as promised I wanted to give you a call now so that I can answer any questions you might have before we meet on... and also just to see if you have had a chance to go through the pack I dropped off, specifically the homework?

Introduce the vendor to you, try to engage in a collaborative conversation

### Pre-qualification and understanding the seller's 'why'

Re-play/clarify why they have chosen now to sell and where they are moving to: (build rapport) (motivations)  
(Confirm similar properties we have sold)

Let me talk about some of the things that I have done since you spoke to xxx

(try to list at least 3 things that you have done prior to the call)

(If already on market)

I can see you are already on the market, how are you finding the experience? (Confirm how our service is an improvement)



(If have other agents invited and it's applicable)

I can see you have already invited .... to value your property, was there a reason why you haven't appointed them?

Could I ask, what has been your previous experience selling or buying?

(If applicable)

Was there anything you didn't like about the experience? (Empathise & build rapport)

What service are you expecting from the agent you choose? Confirm how we can meet these requirements (build rapport)

Thank you very much for your time this morning/afternoon, I'm looking forward to meeting you on .....  
Do you have any other questions at the moment?

Customer notes

Can I just ask, is your property photograph  
ready? – Yes ☐ No ☐

Would it be wrong to assume that If you are happy with everything we discuss at the  
appointment are you ready to come to the market? – Yes ☐ No ☐

### 3 The instruction appointment

#### Prepare market research

☐ Set the agenda

##### Re-confirm the Seller's 'why' & Expectations

What's the most important thing to the seller? What are they expecting from their agent?

#### Property tour

Tell me why you were attracted to this home? (or reconfirm if information already obtained)

What is the best part of your house that you would wish to highlight to potential buyers? (or reconfirm if information already obtained)

#### Property details

##### Room details

Entrance to Porch/Hall	<input checked="" type="checkbox"/>	Windows & Doors	Sash	Bay	Bow	Bifold	French
Heating	Gas radiator	Electric radiator	Log burner	Open fire	Character features	Yes	No
Lifestyle commentary							
Cloakroom/WC	<input checked="" type="checkbox"/>						
Reception Room 1	<input checked="" type="checkbox"/>	Windows & Doors	Sash	Bay	Bow	Bifold	French
Heating	Gas radiator	Electric radiator	Log burner	Open fire	Character features	Yes	No
Lifestyle commentary							

Reception Room 2	<input type="checkbox"/>	Windows & Doors	Sash	Bay	Bow	Bifold	French
Heating	Gas radiator	Electric radiator	Log burner	Open fire	Character features	Yes	No
Lifestyle commentary							
Kitchen	<input checked="" type="checkbox"/>	Windows & Doors	Sash	Bay	Bow	Bifold	French
Heating	Gas radiator	Electric radiator	Log burner	Open fire	Character features	Yes	No
Oven type	Range	Elect					
Lifestyle commentary							
Utility Room	<input type="checkbox"/>						
First Floor Landing	<input type="checkbox"/>						
Heating	Gas radiator	Electric radiator	Log burner	Open fire	Character features	Yes	No
Lifestyle commentary							
Bedroom 1	<input checked="" type="checkbox"/>	Windows & Doors	Sash	Bay	Bow	Bifold	French
Heating	Gas radiator	Electric radiator	Log burner	Open fire	Character features	Yes	No
Lifestyle commentary							
En Suite	<input checked="" type="checkbox"/>						
Heating	Gas radiator	Electric radiator	Log burner	Open fire	Character features	Yes	No
Bath	Freestanding	Roll Top					
Lifestyle commentary							
Bedroom 2	<input checked="" type="checkbox"/>	Windows & Doors	Sash	Bay	Bow	Bifold	French
Heating	Gas radiator	Electric radiator	Log burner	Open fire	Character features	Yes	No
Lifestyle commentary							



Reception Room 2	<input checked="" type="checkbox"/>	Windows & Doors	Sash	Bay	Bow	Bifold	French
Heating	Gas radiator	Electric radiator	Log burner	Open fire	Character features Yes No		
Lifestyle commentary							
Kitchen	<input checked="" type="checkbox"/>	Windows & Doors	Sash	Bay	Bow	Bifold	French
Heating	Gas radiator	Electric radiator	Log burner	Open fire	Character features Yes No		
Oven type	Range	Electric	Double	Kitchen style	Gallery	Country	Modern Family Island
Lifestyle commentary							
Utility Room	<input checked="" type="checkbox"/>						
First Floor Landing	<input checked="" type="checkbox"/>	Windows & Doors	Sash	Bay	Bow	Bifold	French
Heating	Gas radiator	Electric radiator	Log burner	Open fire	Character features Yes No		
Lifestyle commentary							
Bedroom 1	<input checked="" type="checkbox"/>	Windows & Doors	Sash	Bay	Bow	Bifold	French
Heating	Gas radiator	Electric radiator	Log burner	Open fire	Character features Yes No		
Lifestyle commentary							
En Suite	<input checked="" type="checkbox"/>	Windows & Doors	Sash	Bay	Bow	Bifold	French
Heating	Gas radiator	Electric radiator	Log burner	Open fire	Character features Yes No		
Bath	Freestanding	Roll Top	Claw foot	Shower	Combined	Walk-in	Rainfall
Lifestyle commentary							
Bedroom 2	<input checked="" type="checkbox"/>	Windows & Doors	Sash	Bay	Bow	Bifold	French
Heating	Gas radiator	Electric radiator	Log burner	Open fire	Character features Yes No		
Lifestyle commentary							

Bedroom 3 ☐ x ☐ Windows & Doors Sash ☐ Bay ☐ Bow ☐ Bifold ☐ French ☐

Heating Gas radiator ☐ Electric radiator ☐ Log burner ☐ Open fire ☐ Character features Yes ☐ No ☐

Lifestyle commentary

Bedroom 4 ☐ x ☐ Windows & Doors Sash ☐ Bay ☐ Bow ☐ Bifold ☐ French ☐

Heating Gas radiator ☐ Electric radiator ☐ Log burner ☐ Open fire ☐ Character features Yes ☐ No ☐

Lifestyle commentary

Bedroom 5 ☐ x ☐ Windows & Doors Sash ☐ Bay ☐ Bow ☐ Bifold ☐ French ☐

Heating Gas radiator ☐ Electric radiator ☐ Log burner ☐ Open fire ☐ Character features Yes ☐ No ☐

Lifestyle commentary

Bathroom ☐ x ☐ Windows & Doors Sash ☐ Bay ☐ Bow ☐ Bifold ☐ French ☐

Heating Gas radiator ☐ Electric radiator ☐ Log burner ☐ Open fire ☐ Character features Yes ☐ No ☐

Bath Freestanding ☐ Roll Top ☐ Claw foot ☐ Shower ☐ Combined ☐ Walk-in ☐ Rainfall ☐

Lifestyle commentary

Second Floor ☐ x ☐ Windows & Doors Sash ☐ Bay ☐ Bow ☐ Bifold ☐ French ☐

Heating Gas radiator ☐ Electric radiator ☐ Log burner ☐ Open fire ☐ Character features Yes ☐ No ☐

Lifestyle commentary

Landing ☐ x ☐ Windows & Doors Sash ☐ Bay ☐ Bow ☐ Bifold ☐ French ☐

Heating Gas radiator ☐ Electric radiator ☐ Log burner ☐ Open fire ☐ Character features Yes ☐ No ☐

Lifestyle commentary

Bedroom ☐ x ☐ Windows & Doors Sash ☐ Bay ☐ Bow ☐ Bifold ☐ French ☐

Heating Gas radiator ☐ Electric radiator ☐ Log burner ☐ Open fire ☐ Character features Yes ☐ No ☐

Lifestyle commentary

En Suite ☐ x ☐ Windows & Doors Sash ☐ Bay ☐ Bow ☐ Bifold ☐ French ☐

Heating Gas radiator ☐ Electric radiator ☐ Log burner ☐ Open fire ☐ Character features Yes ☐ No ☐

Bath Freestanding ☐ Roll Top ☐ Claw foot ☐ Shower ☐ Combined ☐ Walk-in ☐ Rainfall ☐

Lifestyle commentary

Bathroom ☐

Heating Gas radiator ☐

Bath Freestanding ☐ Roll ☐

Lifestyle commentary

Attic Room (if there's conser

## Outside

Front garden

Rear garden

Garage/Parking facilities

## Property write-up

Attention header

rosie long description (page 2/4)



Bifold ☐ French ☐ ☐ x Windows & Doors Sash ☐ Bay ☐ Bow ☐ Bifold ☐ French ☐  
er features Yes ☐ No ☐ Heating Gas radiator ☐ Electric radiator ☐ Log burner ☐ Open fire ☐ Character features Yes ☐ No ☐  
Bath Freestanding ☐ Roll Top ☐ Claw foot ☐ Shower ☐ Combined ☐ Walk-in ☐ Rainfall ☐  
Lifestyle commentary

Attic Room (if there's consent for this) ☐ x ☐

Outside

Front garden

Rear garden

Garage/Parking facilities

Property write-up

Attention header

rosie long description (page 2/4 of Internet)

Directions

Blank lined area for directions.

Highlights

Two columns of bullet points for highlights.

Additional notes

Large blank lined area for additional notes.

Marketing

Recommended asking price

Complete "My commitment" document with marketing strategy

Financial and legal services

Who is your current mortgage with?

What rate?

How much is outstanding?

What arrangements have you made to finance your next purchase?

Cost of moving appointment? Yes ☐ No ☐

Date

Time

What arrangements have you made to instruct a solicitor?

4 Instruction

Set to sell checklist

- ☐ Open house
- ☐ Concept of an early
- ☐ Offers
- ☐ Other agents app
- ☐ Frequency and ty
- ☐ Preparing for vi

Keys

Viewing arrangem

EPC Availa

☐ Instructi

☐ Descript

☐ Tell 10

Notes

5

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## 4 Instruction

### Set to sell checklist

Open house	Yes <input type="checkbox"/>	Date	Time
Concept of an early/quick sale			
Offers			
Other agents approaching			
Frequency and type of contact (re-cap my commitment)			
Preparing for viewings/photography			

#### Keys

#### Viewing arrangements

EPC	Available	Ordered <input type="checkbox"/>	Board <input type="checkbox"/>	Photos & Floorplan: <input type="checkbox"/>
Instruction confirmation email/letter		<input type="checkbox"/>	Book cost of moving appointment	
Description & Highlights		<input type="checkbox"/>	Book Open House	
Tell 10		<input type="checkbox"/>	Set contact strategy & add to rosie call back diary	

#### Notes

## 5 Instruction pending

24 hour follow up call <input type="checkbox"/>	Hand deliver my commitment (if applicable) <input type="checkbox"/>	Add to bubble list <input type="checkbox"/>	Potential instruction date:
Staying in touch strategy:			
By who?			
How - Email/SMS/Phone			
Personalise and send post-appointment email <input type="checkbox"/>			Add to rosie Call Back Diary