

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.

HRT

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? (If no referral, confirm marketing source)	

Seller's 'why'

Why you are thinking of selling?

Property information

Just before we confirm a day to view, imagine you are at the front door

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