

Script – Real Estate Agent - qualification questions

On average, it is required to reach out to the lead to make a first call within 10 minutes after the lead has received in the Real Estate Agent's CRM. If there is no answer, which is often the case as people tend not to answer unrecognized phone numbers, an SMS message should be sent after 2 hours. If there is still no response, another call should be attempted after 3 hours, and if there is no answer at that time, it is necessary to leave a message. If there is still no response to the message, an email should be sent after a few hours. And update the CRM on every action.

Now, if a Real Estate Agent successfully connects with the lead, the Agent then needs to spend time on an initial lead qualification conversation to determine whether the lead is interested in buying, renting, or selling a house, apartment, etc.

It's important to take into account that an unqualified lead may engage with the AIChat bot on the Real Estate Agent's website, or the contact information of the lead may be received via the Agent's CRM system, as shown in image (1) below. Additionally, leads may come in through other CRM systems that the Agent is using, so it's necessary to consider how to engage the AIChat bot in these scenarios. This might involve sending an email with the AIChat bot embedded in an IFrame or using SMS (T.B.D.), among other methods.

Image (1)

Receive New Leads: **OFF** [Turn Leads On] [New Leads](#) | [Clients](#) | [Client Search](#) | [Schedule](#) |

Client Info		Client Updates / Co
Lead Source	Steve Epstein's / Own Lead	Update / Set Reminder
Client	[ID:197139] Steve-Test Lead Epstein	Action Pending
Email	epsteinsteve@outlook.com	Discard Options
Phone (Cell)	(647) 885-2095	Scheduling Options
Phone (Home)	-	
Phone (Work)	-	
Address	-	
City	-	
Birthday	-	
Living Situation	-	
Looking For	-	
Location	Bradford	
Budget	\$850,000.00	
Timeframe	3-6 Months	
Mortgage Status	-	
Update Client Details		Additional Information

1. If Lead wants to Buy a property:

1.1 How soon are you hoping to purchase a property? If in 6 months or more > ask, "Would you like a free monthly newsletter that will keep you in touch with what's happening in the real estate market? > Next, ask, "When do you think would be a good time to follow up with you? > Next, say, "Between now & then, if you ever have any questions about a particular property or the market, please don't hesitate to call me." > End the call

1. 2 If the Lead wants to purchase in 6 months or less, ask, "Are you currently working with a Real Estate agent?" > **If YES**, ask, "Are you 100% committed to that Agent? In other words, did you sign the BRA/Buyer representation agreement, Form 300, and & Working with Realtor, Form 810 with the Agent?"> **If YES**, wish all the best and end the call. **If NO**, ask, "Are you renting right now, or do you own a house?"> If a lead (who wants to buy property) currently Owns the house/apartment (Lead also probably wants to sell), ask, "Would you like a free home evaluation? So that we can determine what your home would sell for in today's market? You will also know how much equity you have in your home. I can also give you tips on what to do and what not to do, how to make your home show its best and therefore NET you the most money. This is a free service with no

obligation. How does that sound?" If the answer is similar to "SOUNDS GOOD,"> ask, "When the Agent [Name of the Agent] can come by to see your home?"> One more question: Can I ask who's on your home title? As they are on the title, they have some questions about the sales process" "Would they be available at the time as well?"> "Great, I'll now show you the [Name of Agent] Calendar to schedule a meeting with the Real Estate Agent at a time/date that works best for you. > I need your email address (ask to provide the email address and send the Zoom invite) > Show Calendly (maybe explain to the Lead what to do in Calendly to schedule a meeting) > Great, The appointment is scheduled and [Name of the Agent] is looking forward to seeing you on <APPOINTMENT DATE>".

If a lead (who wants to buy property) currently Renting, ask "Are you a first-time homebuyer?"> **If YES or No answer**, tell "Sellers have three options in this market to list their properties. Are you finding that many homes are listed below the market value, at market value, or above market value, and you, as a Buyer, will not know which way they have listed." "It would be very valuable if I could help you to schedule a short Virtual meeting with [Name of Agent] to help you understand which way properties are listed. > "[Name of Agent] watches the market daily and knows the pricing strategies of all the homes. [Name of Agent] can help Buyers find the home they want and get it at the price they want to pay. The online meeting is to get you started on the right path, looking for the right property and not wasting time on the wrong one. The market is too fast to waste time."> After the answer, if agreed to the meeting, say, "Excellent, when can we schedule an online Virtual meeting? This way, I can gather your criteria, share my screen to show you current property listings and provide you with a comprehensive understanding of the marketplace. I'll also present you with some potential options. Does this sound helpful? "Great, I'll now show you the [Name of Agent] Calendar to schedule a meeting with the Real Estate Agent at a time/date that works best for you. > I need your email address (ask to provide the email address and send the Zoom invite) > Show Calendly > Great, The appointment is scheduled, and [Name of the Agent] is looking forward to seeing you on <APPOINTMENT DATE>".

1.3 Some additional questions that the AI chatbot can ask to help the Agent better prepare for the Virtual/Zoom meeting: What price range are you looking at? How many bedrooms, bathrooms, square footage, stories, or other specific features

interest you? Will you be making a cash purchase or obtaining a mortgage? Have you been pre-approved by a lender? Have you had the opportunity to speak with a mortgage broker? > **If NO**, ask, "If you'd like, I can connect you with one of our mortgage advisors."

2. If Lead wants to Rent a property:

2.1 How soon are you hoping to rent a property? If in 6 months or more > ask, "Would you like a free monthly newsletter that will keep you in touch with what's happening in the real estate market? > Next, ask, "When do you think would be a good time to follow up with you? > Next, say, "Between now & then, if you ever have any questions about a particular property or the market, please don't hesitate to call me."> End the call

2. 2 If the Lead wants to rent in 6 months or less, ask, "Are you currently working with a Real Estate agent?"> **If YES**, ask, "Are you 100% committed to that Agent? In other words, did you sign the Tenant Representation Agreement, Form 346 & Working with Realtor, Form 810 with the Agent?"> **If YES**, wish all the best and end the call. **If NO**, continue as per 2.3

2.3 The Chat Bot can explain this to the Lead: "The Agent's job as the tenant's representative is to entice/convince the listing agent (and thereby the Landlord) to accept the tenant's offer. While the Agent needs to know how to present its client's case in the most organized way, the Agent can't do so if their prospective client is unqualified to rent."> Bot can tell the Lead that I can help you save time and help to understand what is required to rent a property for you. > "would you be interested if I'll ask you few questions on behalf of [Name of Agent] > **If NO** or no response > tell "Thank you for letting me know, end chat"> **If YES**, politely tell "I am trying now to understand your Affordability – Can you able to show Landlord enough income/paystubs to show them that you be able to afford rent. Generally, Your rent should be no more than 30% of your monthly pre-tax income. > **If NO** or the Lead relying on social welfare/disability (ODSP) income, in which case it will be challenging to assist the Lead> Advise the Lead to consider a lower price range > and tell "Unfortunately, it will be tough to the [Agent Name] to find a place for you. Your best bet is to try and contact landlords or the listing agent directly on sites such as www.realtor.ca, Kijiji, or Viewit.ca"> wish good luck with the search > end the call.

If YES> tell "Now I am trying to understand your Financial Documents – Explain: "Agent must submit the Rental Application to the Listing Agent/Landlord before any offer application. The Rental Application contains the following documents that must be completed before showings: Form 410, employment letter, credit report, reference letter/s from previous landlords (better to have), and ID/e.g. driving license > Ask "Do you know your credit score? **If YES**, can you write it down to me, please?"> If the score is below 660 > say, "Unfortunately, it will be tough for the [Agent Name] to find a place for you. Your best bet is to try and contact landlords or the listing agent directly on sites such as www.realtor.ca, Kijiji, or Viewit.ca"> wish good luck with the search > end the call. If the score is 660 or higher > say, "That's great! Landlords will see you as a trustworthy tenant.> Tell, "Would you like me to send you the form 410 and explain that Credit Scores and Reports Update at least every 30 days, and I can send you how to obtain your credit report from Equifax or TransUnion?"> **If YES**, ask for the email address/name > Send the email with the pdf file of form 410 and the link for obtaining the Equifax credit score report. > Next, propose to schedule a meeting with the Agent> tell "This way, [Agent name] can gather your criteria, share the screen with you to show you current rental listings, and provide you with a comprehensive understanding of the marketplace. The Agent also presents you with some potential options. Does this sound helpful? > **If YES**, "Great, I'll now show you the [Name of Agent] Calendar to schedule a meeting with the Real Estate Agent at a time/date that works best for you. > I need your email address (ask to provide the email address and send the Zoom invite) > Show Calendly > Great, the appointment is scheduled, and [Name of the Agent] is looking forward to seeing you on <APPOINTMENT DATE>".

2.4 Additional information that the bot needs to know for the rentals to answer the questions, and some additional questions that the AI chat bot can ask to help the Agent to better prepare for the Virtual/Zoom meeting:

2.4.1 Number of occupants - situations may arise where a lead intends to move in with more people than is conventionally acceptable by most landlords. In such cases, advise the Lead that most landlords are looking for a number of occupants corresponding to the home's amount of space. One-bed apartment can accommodate up to 2 Adults, two beds up to 3, 3 beds up to 4, etc.

2.4.2 Poor or Lack of Credit - Landlords look for credit scores of 660 or higher. It will be challenging for you to help a Lead with a credit score of 660 or lower. When reviewing the Credit report, pay attention to Credit Limit, Balance, Past Due and Late Payments.

2.4.3 Newcomers and International students - these types of Leads/clients may not be able to produce a credit report or employment verification. Instead of a good credit report, to try to obtain the desirable rental property, they may be able to provide more rent upfront (for international students, six months upfront is the suggested amount). Include supplementary financial information that may assist in securing a lease (investment account statements, high balance saving accounts, high limit student loans, proof of income grants, etc.)

2.4.4 Pets - While in most cases, prohibiting pets through a no-pet clause is unenforceable (aside from condominiums where pets are not permitted), it is still essential for you to be transparent to your client about Landlord's preferences. It is ultimately up to the client to disclose any pets. If your client is adamant about being upfront regarding pets moving into the property, call the listing agent and ensure the landlords are open to pets. If the Lead is unqualified to rent, we must provide them with a basic level of customer service. When the Agent can't service the Lead, tell them, "Unfortunately, it will be challenging for me to find a place. Your best bet is to try and contact landlords or the listing agent directly on sites such as www.realtor.ca, Kijiji, or Viewit.ca".

3. If the Lead wants to Sell a property:

3.1 How soon are you hoping to Sell a property? If in 6 months or more > ask, "Would you like a free monthly newsletter that will keep you in touch with what's happening in the real estate market? > Next, ask, "When do you think would be a good time to follow up with you? > End the call

3.2 If the Lead wants to sell in 6 months or less, ask, "Are you currently working with a Real Estate agent?"> **If YES**, ask, "Are you 100% committed to that Agent? In other words, did you sign the Listing Agreement, Form 200 & Working with Realtor, Form 810?"> **If YES**, wish all the best and end the call.

If NO, ask, "Would you like a free home evaluation? So that we can determine what your home would sell for in today's market? You will also know how much

equity you have in your home. I can also give you tips on what to do and what not to do, how to make your home show its best and therefore NET you the most money. This is a free service with no obligation. How does that sound?" If the answer is similar to "SOUNDS GOOD,"> ask, "When the Agent [Name of the Agent] can come by to see your home?"> One more question: Can I ask who's on your home title? As they are on the title, they have some questions about the sales process" "Would they be available at the time as well?"> "Great, I'll now show you the [Name of Agent] Calendar to schedule a meeting with the Real Estate Agent at a time/date that works best for you. > I need your email address (ask to provide the email address and send the Zoom invite) > Show Calendly (maybe explain to the Lead what to do to schedule a meeting) > Great, The appointment is scheduled, and [Name of the Agent] is looking forward to seeing you on <APPOINTMENT DATE>".

3.3 Additional questions that the AI chat bot can ask to help the Agent better prepare for the meeting:

Understand Lead Situation: > "Can you tell me about your property and what motivated you to consider selling?"> "Are there any specific timelines or deadlines you have for selling the property?"

Assess Their Needs: > "What are your top priorities or goals in selling this property?"> "Have you considered where to move after selling this property?"

Gather Property Information: > "Can you describe the property to me? How many bedrooms, bathrooms, and other important features does it have?"> "Have any recent renovations or upgrades to the property?"

Discuss Pricing: > "What price range are you hoping to achieve for your property?"> "Do you have a recent appraisal or estimate of your property's value?"

Highlight Agent experience, marketing strategies, and how you can help the client/lead achieve their goals.