

FSBO Prospecting Checklist



Today's Date: _____

Referred by: _____

Source Type: _____

Contact Type: _____

Owner Name: _____

Address: _____

___ Add to Email Marketing Automation System

___ Sign up for Weekly Newsletter

___ Add to CRM

___ Add to Dialer

___ Add to Back End Of Website

___ Organic email – include: _____

Appt. Date: _____

Appt. Time: _____

Appt Type: ___ Appt. ___ Pop By ___ drop package before mtg

Meeting: ___ In Person ___ On Phone

Listing Agreement: ___ Admin fee ___ 4% Clause ___ Cancel Clause

Listing Agreement Only ___ Email ___ Hard copy

Listing Agreement/Marketing ___ Email ___ Hard Copy

Full Marketing Package ___ Email ___ Hard Copy

POP by Package Only ___ hard copy