

# SANDLER LEAD INTAKE FORM

*prospect does 70% of the talking*

Call Date: \_\_\_\_\_

Contact: \_\_\_\_\_

1st Appointment Date: \_\_\_\_\_ Time: \_\_\_\_\_

Client Name \_\_\_\_\_ Partner's Name (or other decision influencer) \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_

**\*\*\*\*\*Look up address on Zillow or Realtor\*\*\*\*\***

Do you have 15 minutes to discuss your project so we can determine if it makes sense for you to invite me to your home?

How did you find out about us?

Type 1: What seems to be wrong with your home? (What don't you like?)

**EPICBS - Embarrassed – Privacy – Isolation – Cramped – Broken Promise – Safety**

Type 2: Do you have any specific concerns about the project?

**neighbors, city, allergies, timing, pre-existing conditions, noise, pets, special needs children, safety, temporary living conditions, communication, other**

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## Personal Information:

Note: Personality traits auditory, visual, kinesthetic, etc

Phones

Emails

Text/email preference

What is the age of your home?

How long have you lived there?

How long have you been planning this project?

How long do you plan to stay in your home?

Have you spoken with a realtor? (move instead of remodel?)

OPTIONAL - Confirm Home value before asking Likely Investment (it will always be low!)

Who would we be working with on layout, colors, finishes, etc *(this is designed to get everyone involved and attending the first meeting)*

Note: Discuss your process with the prospect now:

## INSERT CLOSING PALO HERE