

Action to Take

Use this spreadsheet to organize all your steps with a buyer to ensure nothing is missed in the process, your client receives the best care and you look professional.

The spreadsheet and the steps below are meant as an example. They are by no means the full comprehensive list of the steps which should be taken with a buyer. My goal with this is to show you HOW things can be systematized and WHY doing so can ensure more of a white glove level of service for your clients and set you forward on the path of earning multiple referrals.

Feel free to use the spreadsheet (make a copy) for each new client, or if you prefer you can print this and use it. Whatever makes you more comfortable to actually use it.

 **New Buyer Process // This Is A TEMPLATE // *Make A Copy!***