

# Initial Conversation Form

Name

Date Received

Phone Number

Email Address

Lead Type

A       B       C

Agent

Yes       No

Location

Where are they looking?

Price

What is their price range?

Motivation

What is their timeline to transact?

Mortgage

Paying in cash? Preapproved?

Appointment

What date and time is scheduled?

Next Steps

What are your action items?

Other Notes

Anything else?