

Seller Qualification Form

90-Day Seller Appointment Implementation Kit

Version 1.1 | Last Updated October 2, 2026

Purpose: Separate resource capture from qualification and appointment readiness.

Requires: Seller Offer Selection Worksheet Offer; Seller Resource Templates Delivery promise; Software Functions and System Setup Documented service area; Seller Campaign Compliance Checklist Brokerage rules

When to use: During funnel setup and when lead quality changes

Estimated time: 45–75 minutes

[Open the Resource Hub](#)

Customize before using

Replace the fields used in your selected template. Use [AGENT NAME], [BROKERAGE], [CITY], [COUNTY] or [NEIGHBORHOOD], [SELLER OFFER], verified [LOCAL MARKET DATA], [BOOKING LINK], [PHONE] and [EMAIL] consistently. Complete any additional bracketed delivery, privacy, property or review fields that apply. Delete instructions and unused alternatives before sending.

The qualification rule

A qualified seller opportunity is a reachable owner or authorized seller with a property in your documented service area and scope, stated selling consideration within six months OR an explicit request for a selling consultation, and willingness to discuss the property. Verify unknowns instead of scoring them as qualified. This is the kit's operating definition, not an industry standard.

Ask about existing representation before solicitation progresses. Follow the brokerage-approved process for someone already represented; do not treat a representation question as permission to interfere with an agreement.

Low-friction capture

Order	Question	Required	Why it exists
1	First name	Yes	Personal delivery
2	Email	Yes	Deliver resource and reply route
3	Property address	Only for property-specific report	Produce the requested analysis
4	Separate optional channel opt-ins	No	Record a permitted contact choice

Deliver the generic resource immediately. Do not gate it behind further questions or booking.

After the resource request

Question 1: Where is the property? [CITY / AREA]; full address optional for a generic resource and required for property-specific review.

Question 2: Are you the owner or authorized to discuss selling it? Owner / Authorized seller / Neither / Prefer to discuss. Do not ask for identity documents in the marketing form.

Question 3: When might you consider selling? 0–3 months / 3–6 months / More than 6 months / Just researching / Not sure.

Question 4: Would you like to discuss a selling plan for this property? Yes / Not yet.

Question 5, optional: What would make this conversation useful? [OPEN TEXT]. Do not request sensitive medical, family, immigration, or financial details.

Before appointment booking

- Property address and type: required to prepare and confirm service fit.
- Owner/authorization, timeline or explicit consultation request: required for the qualification definition.
- Preferred contact route: email required; phone optional unless a telephone appointment is chosen.
- Already working with a listing agent? Yes / No / Not sure. Route through the brokerage-approved handling policy.
- Optional condition question: What should I know about the property's condition before we talk? Keep it brief; detailed disclosures belong in the transaction process.
- Appointment expectations acknowledgement: This is a conversation about your property, timing, and possible selling plan. It does not require a decision to list.

Higher-qualification variant

Use the same capture form. Before showing the calendar, require area/address, owner or authorization, timeline, and consultation interest. Add property type and a short objective field. Do not add occupancy, condition, motivation, and documentation questions all at once unless you need them to deliver the chosen consultation. Test the added friction as one change through Seller Ad Testing Tracker.

Routing rules

Ready qualified: qualifies and indicates 0–3 months or explicitly asks to talk now → calendar and human task.

Qualified but later: qualifies at 3–6 months and does not want an immediate conversation → useful nurture and a dated human follow-up.

Researching or unknown: deliver resource; ask one clarification if allowed; no qualified timestamp until confirmed.

Out of scope: acknowledge the request and use the brokerage's referral or service process; no campaign qualification count.

Unreachable or invalid: correct details if possible; retain exclusion reason for spam/test records; do not relabel weak leads to improve the rate.

Already represented: pause solicitation pending the brokerage's direction.

Manual clarification messages

Missing area: Thanks for requesting the guide, [FIRST NAME]. Which city or area is the property in? I want to make sure the information is relevant.

Missing timeline: Are you considering a sale in the next few months, later this year, or mainly gathering information right now?

Consultation request: Happy to talk through it. Could you confirm the property address and whether you're the owner or authorized to discuss a sale?

CRM fields

Record opportunity ID, original source and ad ID, first capture timestamp, qualification status and timestamp, property scope, contact permissions, first booking timestamp, first held timestamp, signed listing timestamp, next task, and suppression. Store property and personal details securely in the CRM; the included spreadsheets use IDs for tracking.

You are done when

Every question has a purpose, the qualification rule is documented, and test sellers enter the right branches.