



The Defining Difference  
BY CINDY ERTMAN

# “Getting to Know You” Realtor Intake Form



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## “Getting to Know You” Realtor Intake Form

Establishing trusted and loyal relationships with your Realtor partners requires you to know their strengths and their value proposition to help them secure their relationship with the buyer. Prospective homebuyers are frequently not loyal to their real estate agents and often shop around with different agents when searching for their dream home. So, when your Realtor partner refers you a new buyer, use the below intake form to get to know the Realtor’s value proposition so you can cross-sell them and keep their buyer in their court. Doing this builds confidence in the buyer and also reminds the agent that you are a supportive and loyal partner.

### Intake Form - Questions to Ask Your Realtor Referral Partner

Whether you are meeting with the Realtor in person or on the phone, let them know that the purpose of these questions is for you to learn what their greatest strengths are and why someone should pick them as their Realtor so you can cross-sell them to clients that they refer to you in the future.

Agent Name: \_\_\_\_\_ Company: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Email address: \_\_\_\_\_

Mailing address: \_\_\_\_\_

How long in the RE business? \_\_\_\_\_

What market do you service? \_\_\_\_\_

Who is your ideal client? \_\_\_\_\_

What are your core strengths as a Realtor? Why should a buyer or seller pick YOU as their agent?

\_\_\_\_\_  
\_\_\_\_\_

What are your company’s greatest strengths? \_\_\_\_\_

\_\_\_\_\_

Do you prefer to work with buyers / sellers or both? \_\_\_\_\_

What are 3 goals that you’d like to achieve during the next year?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_