

## First Consultation – Self Assessment of Brokers / Agents

**Name of the Company:**

**Authorized person:**

**Qualification:**

**Registration / License Number:**

**Address:**

**Contacts:**

**Emails:**

**Website:**

**Transaction types:**

**Speciality:**

### GOALS

**Business goal:**

Short Term (1-2 years)

Long Term (5-10 years)

**Financial goal:**

Short Term (1-2 years)

Long Term (5-10 years)

**Personal goal:**

Short Term (1-2 years)

Long Term (5-10 years)

# Present Business Model

## TEAM STRENGTH & WEAKNESS

Personal Strength:

Personal Weakness:

Team Strength:

Team Weakness:

## CUSTOMERS / CLIENTS

Source of Buyers:

Source of Sellers:

| Sources   | Customers / Clients (Buyers & Sellers)     |  |  |   |
|---|--|--|--|---|
|   | B 2 B                                      |  | B 2 C                                  |   |
|   | Builders /<br>Developers<br>(only Sellers) | Other Brokers<br>/ agents<br>(buyers &<br>sellers) | Retail investors<br>(buyers & sellers) | End-users /<br>Owners (buyers &<br>sellers) |
| Walk-in   |  |  |  |   |
| References <ul style="list-style-type: none"><li>• Peers</li><li>• Clients</li><li>• Friends /<br/>Relatives</li><li>• Acquaintances</li><li>• Others</li></ul> |  |  |  |   |
| Print Media <ul style="list-style-type: none"><li>• TOI</li><li>• Middy</li></ul>   |  |  |  |   |

|  |  |  |  |  |
|--|--|--|--|--|
| <ul style="list-style-type: none"> <li>• Gujarat Samachar</li> <li>•</li> <li>•</li> </ul>   |  |  |  |  |
| <b>Internet</b> <ul style="list-style-type: none"> <li>• Portals</li> <li>• Emails</li> <li>• Website SEO</li> <li>• Social media</li> <li>• Blog</li> <li>• Others</li> </ul> |  |  |  |  |
| <b>Telecommunications</b> <ul style="list-style-type: none"> <li>• SMS</li> <li>• Calls</li> <li>• Others</li> </ul>   |  |  |  |  |
| <b>Exhibition / Event</b>  |  |  |  |  |
| <b>Seminar / Workshop</b>  |  |  |  |  |
| <b>Others</b>  |  |  |  |  |
|  |  |  |  |  |

**What is difference between prospect, customer & client?**

Prospects: Potential customer; to be customer.

Customer: Person/ Organisation who bought product /services form you recently.

Client: Customer who bought your product / services second or more times.

Maturing Client: Client is who buys product / services from you repeatedly.

What you want from them > > Three results from these above persons / org are

> Revenue

> Information

> Better system or model for producing Revenue & Information

**Questions to be asked:**

**Business Model:**

- Do you have a 'Business flowchart'?
- Am I earning sufficient? How much increase is possible in my revenue?

**Marketing & Sales:**

- Who is my customer?
- Where is my customer?
- Why she/he would buy from me?
- How she/he would buy from me?

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