WORKING TEMPLATES FOR REAL ESTATE AGENTS AND AGENCIES

The first buyer conversation

Choose the questions that fit the conversation. This is not a questionnaire to read aloud.

> You are considering property overseas. What would you like the purchase to do for you?

- How would you use the property during the year?
- What is your total budget, including associated costs?
- How much is available for the initial payment?
- What have you considered already, and why did you not choose it?
- What do you need to know before taking the next step?

> I will write up your requirements and questions. Before introducing the local team, we will agree what information can be shared and who will contact you.

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A brief without unnecessary personal data

Complete privately. Do not publish buyer information or add passports, banking records or private correspondence to these templates.

Purpose of purchase	_____
Destination and reason for choosing it	_____
Total budget and currency	_____
Funds available for the initial payment	_____
Acceptable payment schedule	_____
Decision deadline and required completion date	_____
Essential requirements	_____
Preferences the buyer can vary	_____
Owner use and rental plan, if relevant	_____
Properties considered and reasons for rejecting them	_____
Prior contact with IBG or the seller, if known	_____
Unresolved questions	_____
Agreed next step	_____
Preferred language, contact channel and time	_____

> Record unknowns as “not confirmed”. An empty field or a missing invoice does not mean a cost is zero.

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Property comparison sheet

Complete for specific properties. Before comparing prices or floor areas, check what each figure includes.

Criterion	Property 1	Property 2	Property 3
Location and distances relevant to the buyer			
Quoted price and currency			
What the price includes			
Additional charges			
Initial payment and subsequent schedule			
Completion status and confirmed dates			
Floor area and measurement basis			
Ownership and use conditions			
Management, costs and restrictions			
Questions before the next decision			

> Record unknowns as “not confirmed”. An empty field or a missing invoice does not mean a cost is zero.

Record a source and date for each material condition. The CSV includes a separate column for this information.

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Plan the trip and the viewings

Before the trip

- Update the brief and agree the purpose of the trip.
- Confirm dates, meeting point, working language and host contact.
- Check property availability and viewing arrangements.
- Allow time for travel between locations and for discussion.
- Clarify which travel and viewing costs the buyer will pay.

During and after viewings

- After each viewing, record what fits and what prevents a decision.
- Separate confirmed terms from questions for the seller.
- If priorities change, update the brief before further viewings.
- Do not decide to pay solely because the trip is ending.

> Record unknowns as “not confirmed”. An empty field or a missing invoice does not mean a cost is zero.

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Your first introduction to IBG Property

You can register before you have a buyer. Before making a real introduction, prepare the brief and agree how the relationship will work.

1. Create a free partner account and review the workflow.
2. Ask whether the buyer has contacted IBG before. Agree attribution, responsibilities, the fee calculation basis and payment conditions.
3. Explain the local team's role and obtain the buyer's permission to share the necessary contact details.
4. Use the agreed working channel to pass on the enquiry. The initial brief does not need passports or banking documents.
5. Confirm that the enquiry has been accepted, who is responsible and what happens next.

> This toolkit does not set contractual terms or establish a right to a referral fee. A reservation, a completed purchase and a paid referral fee are separate stages.

Create a free partner account

First-introduction guide · Referral fee checklist