



Client Discovery Questionnaire

The Art of Directing: How Top Agents Build Trust & Close with Integrity | By Khadija El Otmani

Use this questionnaire during or immediately after your first interaction with a new client. The goal is to capture not just what they want, but why they want it and how they make decisions.

Client Details

Client Name

Date of First Contact

Source / Referral

Contact Method

Understanding the Motivation

What prompted the enquiry now?

Is there a deadline or event driving this?

Previous agent experience? What went wrong?

What does "the right property" look like?

Decision-Making Profile

Who is involved in the decision?

- ☐ Client decides alone
- ☐ Partner / spouse involved
- ☐ Family members consulted
- ☐ Business partner or advisor involved
- ☐ Legal / financial advisor will review

Decision style:

- ☐ Fast and decisive — commits once they see the right option
- ☐ Analytical — needs data, comparisons, and time to process
- ☐ Emotional — driven by feeling, lifestyle vision, first impressions
- ☐ Cautious — needs reassurance, multiple viewings, validation

Market Awareness

How informed is this client?

- ☐ Very informed — follows market data, knows pricing and areas
- ☐ Somewhat informed — basic research, knows a few areas
- ☐ Misinformed — unrealistic expectations from social media or friends
- ☐ Not informed — first-time buyer, needs full education

Misconceptions to address?



Communication Preferences

Preferred channel:

- ☐ WhatsApp
- ☐ Phone calls
- ☐ Email
- ☐ In-person meetings

Update frequency:

- ☐ Daily updates
- ☐ Weekly summary
- ☐ Only when relevant
- ☐ Client will reach out when needed

Agent Assessment & Strategy

Client temperature (hot / warm / cold)

Key objection anticipated

Best approach for this client

Properties to prepare

Follow-up date and action

Tip: *The first 15 minutes set the tone. Ask more than you talk. The client who feels heard is the client who trusts you to lead.*