

WORKSHEET 08 / 08

Professional client handoff

Help a client explain the situation without having to start from scratch.

- ☐ Confirm the client's permission to share their contact details.
- ☐ Identify the household location, decision-maker, and preferred contact method.
- ☐ Summarize the move or property deadline and any access constraints.
- ☐ Note retained belongings and unresolved family decisions.
- ☐ Agree on who needs updates and introduce the client to the sale team.

YOUR NOTES & NEXT STEPS

Client contact / situation / timing / next conversation