

Buyer Priorities Alignment Worksheet

Hear from every decision maker before you schedule showings.

A free agent resource from Bart Gurley + Larry Smith

Give each person a voice

Ask each decision maker to answer independently before comparing responses. Avoid allowing one person's answers to substitute for everyone's priorities.

Story

What prompted this move? What is working in your current home? What would you most like to change? Notes: _____

Vision

What would a successful move look like a year from now? Which daily routines should improve? Notes: _____

Needs

For each person record: location/commute; home features; timing; lender-reviewed budget/payment comfort; non-negotiables. Notes: _____

Where do priorities conflict?

Priority: _____ | Person A: _____ | Person B: _____ | Tradeoff to discuss: _____. Repeat for the most important differences.

Before showings

Agree on shared priorities, acceptable tradeoffs and the next step. Include each decision maker in agreed communications. Do not infer neighborhood suitability from protected characteristics; use the client's stated needs and objective information.

Want help applying this in your business?

Explore practical coaching, marketing support and the Maverick community.

<https://www.maverickrealtynetwork.com/help>

Related episode: <https://youtu.be/ZOAKICPIG0A>

Educational resource. Adapt to client needs, current lender figures, local rules and brokerage policies. No promised results. Prepared October 8, 2026.