

First-Call Conversation Guide

Follow through on the request. Open a useful conversation.

A free agent resource from Bart Gurley + Larry Smith

Prepare before you call

Know what the person requested, when it was sent and whether you have an appropriate reason and permission to contact them. Have the information ready to resend.

A practical opening

"Hi [name], it's [agent]. You requested [information]. I wanted to make sure it reached you. Did you get it?" This is a practice example, not a verbatim transcript.

If the information did not arrive

Confirm the preferred delivery method, correct the contact detail if needed and deliver what you promised. Do not turn a delivery problem into pressure for an appointment.

A natural next question

"By the way, what were you hoping to learn from that?" Listen first. Then ask one relevant question about their timing, location or situation.

Agree on the next step

"Would it help if I sent [specific information]?" Confirm what you will do, how it will arrive and whether follow-up is wanted.

After-call checklist

Requested information delivered: ____ | Main question: ____ | Preferred channel: ____ | Agreed action: ____ | Follow-up date: _____. Respect opt-outs and brokerage/contact rules.

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/CA6a9BRexH0>

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