

Seller Discovery Call Guide

A simple, conversational framework for understanding the seller and finding the right next step

HOW TO USE THIS GUIDE

- Use the wording naturally—do not read it like a robot.
- You do not need every question on every call. Follow the conversation.
- Listen for the seller's exact words and use them when you summarize.

Mindset

- Be curious, not pushy.
- Align with the seller's goals.
- Treat every lead like it is the only one you have.
- Your goal is to understand the situation and design a win-win solution.

1. Open the Conversation

SAY

Hey, this is {{Your Name}}. I was reaching out about the property you have in {{Property City}}. Are you still looking to sell it, or has that already been taken care of?

THEN SAY

I wasn't sure if you were still exploring options or if it had already been listed or sold. Do you mind if I ask a couple of quick questions to see if we might be a fit?

2. Confirm the Decision Makers

ASK

Just so I don't leave anyone out, are you the only person on the title, or is someone else involved too?

FOLLOW UP

If we found an option that made sense, would that be a decision you could make on your own, or would someone else want to weigh in?

IF SOMEONE ELSE IS INVOLVED

Are they available now, or should we set a quick time for all of us to connect together?

CONFIRM

Perfect. That helps me include everyone who needs to review anything so nothing gets held up later.

3. Understand Occupancy and Timeline

ASK

Is the property vacant, rented, or are you living in it right now?

If the owner lives there

ASK

If everything went smoothly and worked in your favor, how soon would you ideally want the property sold and the funds in your account?

ASK

Do you already have your next place lined up, or is that still up in the air?

IF THEY ASK WHY IT MATTERS

Sometimes we can help with that part of the transition too. It just depends on the situation.

If the owner does not live there

ASK

Is anyone living there now, or is it sitting empty?

IF TENANT-OCCUPIED

Are the tenants on a lease or month-to-month? Are they current on rent? What is the monthly rent right now?

ASK ABOUT TIMING

If everything went perfectly, how quickly would you want to close and be fully out of it?

4. Understand the Motivation

START OPEN-ENDED

Tell me a little more about what is prompting you to think about selling the property right now. How long have you been thinking about it?

GO DEEPER

What happens if the property does not sell soon? How would that affect you personally? What would it mean for you to finally be done with it?

USE THEIR WORDS

When you said “{{their words}},” what did you mean by that exactly?

ASK ABOUT PRIOR OFFERS

Have you had any offers that actually made sense, or has everything felt a little off?

BUILD RAPPORT

I understand. I’ve worked with sellers in similar situations. Some just want to be done and move on; others want to make sure they are not leaving money on the table.

Coach’s note: Stay curious here. Ask one question at a time, then pause and listen.

5. Review the Property Condition

ASK

How would you describe the overall condition of the property? If I were walking through it, what updates or repairs would stand out?

ASK ABOUT MAJOR ITEMS

Has any recent work been done on the roof, HVAC, plumbing, or electrical?

EXPLORE THE LISTING OPTION

If you fixed it up and listed it yourself, what work would it need to really compete in the neighborhood?

ASK ABOUT COST

Do you have an idea of what those repairs might cost in today's market?

ACKNOWLEDGE

A lot of sellers are surprised by how quickly roof, flooring, HVAC, and paint costs add up.

6. Discuss Price and Fit

ASK

What price are you hoping to get for the property?

UNDERSTAND THE NUMBER

What made you land on that number?

CONNECT PRICE TO THE GOAL

If you got that price, what would it allow you to do next?

TEST FLEXIBILITY

If that number did not work out, would you still want to sell, or would you hold onto the property for now?

UNDERSTAND THE DECISION PROCESS

If the numbers made sense, would you want to review everything first, or would you prefer to move forward while we are on the call and keep things simple?

7. Summarize What You Heard

RECAP

Let me make sure I understand. You're dealing with {{insert key issues}}, and ideally you'd like to get this handled fairly soon without putting more time or money into it. Is that right?

CONFIRM WHAT THEY WANT

And you would prefer someone who could take care of everything for you?

SET EXPECTATIONS

Traditional buyers can sometimes drag things out with inspections and requests for repairs. Have you run into that before?

REFLECT THE GOAL

It sounds like you're ready to be done with it—you just do not want to take a loss.

8. Set the Follow-Up Call

SAY

I'm going to take about 20–30 minutes to speak with my partners and see what the property may qualify for. Then I'll call you back.

SET THE EXPECTATION

That follow-up usually takes about five minutes. I'll explain what it looks like to work with me and what the property qualifies for.

ASK FOR A CLEAR DECISION

All I ask is that you make a confident yes-or-no decision. No is perfectly okay.

CHECK FOR QUESTIONS

With that said, do you have any other questions for me?

SCHEDULE IT

Great. Will you be available at _____ or _____ for me to call you back? Perfect—I'll talk with you soon.

Quick Call Notes

Seller's main reason for selling: _____

Ideal timeline: _____

Occupancy / tenant details: _____

Decision makers: _____

Property condition / major repairs: _____

Price expectation: _____

Best words or phrases to use in the recap: _____

Follow-up time: _____