24/7/365 AI Voice Agent: Client Onboarding & Data Audit

First-meeting questionnaire

Realty Lock AI

Fillable version: click a box to type, tick the checkboxes, then save the file and send it back.

Meeting objective

Collect the technical setup, lead sources, calendar, voice and script preferences, texting consent details and brand assets needed to build, test and deploy the client's AI voice agent system.

Texting goes live only after the client's own carrier approval, which can take days or weeks.

> **Before we start**
>
> Do not write passwords, API keys or logins on this form. We collect those through a secure channel after the meeting. Mark anything unknown as 'Need to find out' and note who will find out and by when.

Item	Details
Client business name	
Meeting date	
Meeting held by	
Attendees	

Client Profile & Business Mechanics

Question	Client answer
Primary contact name	
Primary contact role	
Business entity or brand name	

Primary business model	☐ Retail brokerage or team: listings and buyer leads ☐ Solo agent: listings or wholesale ☐ Real estate investor or wholesaler: off-market acquisition ☐ Hybrid: agent and investor
Target markets (cities, counties, zip codes)	
Average deal size or target wholesale fee	
Number of acquisition reps or agents who will take transfers and appointments	
Who is the typical seller or buyer	

Lead Sources & Outbound Data Uploads

Question	Client answer
Which lead types will be uploaded by CSV or automated feed	☐ Expired listings and FSBOs ☐ Pre-foreclosure or tax delinquent ☐ Code violations or fire listings ☐ Absentee owners or high equity ☐ Probate or inherited properties ☐ Cold CRM database reactivation ☐ Website forms or ad campaigns ☐ Referrals
Data provider(s) used	
Which CSV columns can be provided	☐ Owner first and last name ☐ Property street, city, state, zip ☐ Mailing address if different ☐ Up to 3 phone numbers per record ☐ Property details such as beds, baths, square feet, estimated equity
Is Property Address included in every upload? (calls and scripts refer to it)	☐ Yes ☐ No
How the data was obtained	
Do you have permission to contact these people	

Estimated weekly or monthly outreach volume	
Current speed to lead (how fast new inbound leads are called back today)	

System Integrations & Technical Environment

Question	Client answer
Current CRM name	
Current CRM plan	
Where calls, transcripts, recordings and tags should be logged	☐ In the client's new Realty Lock AI account ☐ In your current CRM ☐ In a Google Spreadsheet
Calendar platform	
Booking link	
Acquisition rep availability windows (days and times)	
Minimum buffer between bookings	
Calendar time zone	
Local area codes needed for outbound caller ID	
Does the client already own phone numbers or a phone provider account that must be kept	☐ Yes ☐ No, provide new numbers
Call-forwarding number for live transfers (agent mobile or office)	

Conversation Logic & Script Parameters

Voice Personality & Persona

Question	Client answer
Bot persona name	
Gender preference	

Accent preference	
Speaking tone	☐ Casual and empathetic ☐ Direct and professional ☐ Energetic
Background office noise	☐ Yes ☐ No
Languages needed	☐ English ☐ Spanish ☐ Korean ☐ Arabic ☐ Other:
The market's most common non-English language	
Confirm the call always identifies itself as AI at the start (this is not optional)	☐ Confirmed

Outbound Script & Qualification Guardrails

Question	Client answer
Greeting opening line	
Core value proposition or hook	
Condition (confirm or edit): What major updates or repairs does the home need right now?	
Timeline (confirm or edit): How soon are you looking to close if we agree on terms?	
Motivation (confirm or edit): Are you moving closer to family, downsizing, or just looking to liquidate?	
Price (confirm or edit): Do you have a ballpark figure in mind you would need to walk away with?	
Hard disqualifiers or dead ends (what answers should end the call politely)	
Topics to handle with extra care (the AI slows down and softens its language on foreclosure, delinquent taxes and probate; ask whether to add others)	
Words or claims the AI must never say	

Should voicemail leave a message or hang up	☐ Leave a message ☐ Hang up
Voicemail wording	

Inbound Callback & Speed-to-Lead Handling

Question	Client answer
Inbound greeting (pre-filled example: 'Thanks for calling back! This is (Bot Name) with (Company Name). I reached out earlier regarding (Property Address). Did I catch you at a good time?')	
Property knowledge base: listing features and asking price for retail leads	
Property knowledge base: buying criteria and cash offer range for investor leads	
After-hours logic between 9 PM and 7 AM	☐ Book an appointment for the next morning ☐ Take details and text urgent alerts to the owner
Client FAQ and common answers to load	
Common objections and the answers to give	

Live Transfer & Escalation Rules

Question	Client answer
Live transfer trigger criteria	☐ Seller demands a price within target buying range ☐ Seller expresses extreme urgency, needs to sell within 14 days ☐ Seller asks a complex legal or probate question ☐ Other:
Business hours for live transfers (after hours the AI books an appointment instead)	
Primary live transfer phone number	
Secondary or backup live transfer number	
SMS alert mobile number for hot lead notifications	
Email for hot lead alerts	

What the AI should say if nobody answers the transfer	

Compliance & Opt-Out Management

Question	Client answer
Do you sync your own internal Do Not Call list?	☐ Yes ☐ No
Where is that list kept?	
Do you scrub against the national and state Do Not Call registries?	☐ Yes ☐ No ☐ Need to find out
Who does the scrubbing?	
Opt-out keywords that must stop all calls and texts (for example 'Remove me', 'Stop calling', 'Wrong number', 'Do not contact me', 'Sue you')	
Automatic Do Not Call tag name in the CRM (our standard is 'dnc')	
Allowed calling hours per local and state rules (default 8:00 AM to 8:00 PM local time)	
States you call into	
Do you record calls?	☐ Yes ☐ No
Do your states require all-party consent for recording?	☐ Yes ☐ No ☐ Need to find out (if yes the AI says so at the start of the call)
State and brokerage license number	
Brokerage compliance rules the AI must follow	

Texting Registration & Consent

Each client needs their own carrier registration (brand and campaign) and their own consent form, carriers decide approval, and texting goes live only after the client's own carrier approval, which can take days or weeks.

Question	Client answer
Legal business name exactly as registered	
Entity type	☐ LLC ☐ Corporation ☐ Sole proprietor ☐ Other:
EIN (write only 'Have it' or 'Need to find out' here, send it securely)	
Business address	
Business website	
Business phone	
Business email	
Authorized representative name	
Authorized representative title	
Authorized representative email	
Authorized representative mobile	
Will you text from a new number we provide or an existing number?	☐ New number ☐ Existing number
Caller ID display name for outbound calls (what the business name should show as)	
How do people agree to receive texts today? (our standard is an optional, unticked consent checkbox on a call-request form, texts go only to people who ticked a box)	
Where will the consent form live?	
Do you have a website with a Privacy Policy and Terms pages that name the business and the consent method?	☐ Yes ☐ No, we will provide the pages
Expected texts per month per contact (our standard is up to 8)	
Kinds of texts (appointment confirmations and reminders; follow-ups to people who requested a call)	

Who answers HELP?	
Confirm you understand: no texts go to anyone who has not opted in, even after registration is approved, and STOP always ends texts	☐ Confirmed

Optional: asking for consent on a call

Question	Client answer
Would you like the AI to ask callers for permission to text them during a call?	☐ Yes ☐ No ☐ Not sure
If yes, note that verbal consent must be registered as an opt-in method in your carrier registration, and the AI is set up to record the consent as an opt-in tag	☐ Understood
Preferred wording for the consent question the AI asks (pre-filled example: 'Before we finish, may Realty Lock AI text you a confirmation and reminder for your appointment?')	
When should the AI ask this?	☐ After booking an appointment ☐ Another point:

Appointment Booking & Reminders

Question	Client answer
Booking calendar name	
Who owns the calendar?	
Appointment types	
Appointment length	
Who is booked?	☐ One rep ☐ Round robin
Notice required before booking	
How should the booked person be notified?	☐ Confirmation email ☐ Confirmation text, only for people who opted in ☐ Reminder text 1 hour before, only for people who opted in ☐ Reminder email

Sender name wanted in the confirmation and reminder	
Confirmation wording preferences	
Reminder wording preferences	
Who on your side should be notified of each new booking? (name, phone, email)	
What should happen when someone no-shows or cancels?	
What should happen when a lead says they are not interested? (our standard: tag them and stop all further calls and texts)	

Branding, Domain & Website

Question	Client answer
Logo files	
Brand colors	
Brand fonts	
Company tagline	
Short company description	
Photos of the owner or team, if wanted	
Website domain	
Who controls the domain DNS?	
Email sending domain (it needs to be verified before emails go out)	
From-name for emails	
From-address for emails	
Social profile links	
Existing landing page link	

Existing call-request form link	
Do you have an intro video or will we use Realty Lock AI's?	☐ Own video ☐ Use Realty Lock AI's
Testimonials you have written permission to use	
Things you do NOT want mentioned	

Access & Handoff

Question	Client answer
People who need a login (names, roles, emails)	
Permission level for each	
Who approves changes?	
Best contact for urgent issues	
Best contact for the carrier registration	
Is a Google account needed for calendar and spreadsheet sync?	☐ Yes ☐ No
What do you use today to receive hot lead alerts?	
Note: credentials are exchanged securely and never written on this form	

Goals, Go-Live & Sign-off

Question	Client answer
Top goal 1 for the first 90 days	
Top goal 2 for the first 90 days	
Top goal 3 for the first 90 days	
Numbers that define success: dials per week	
Numbers that define success: appointments per month	

Numbers that define success: cost per appointment	
Target start date for calls	
The client approves a test call and a test text before launch	☐ Agreed

Open items

Item	Owner	Due date

Sign-off

Sign-off	Details
Client name	
Client signature	
Date	
Realty Lock AI representative	
Representative signature	
Date	