

# Property enquiry to site visit.

Use this checklist with the project owner, marketing team and enquiry-response team. Agree what is known, who approves it and what must happen next.

## 01 / Project facts

- ☐ Identify the project, location, property category and the actual team responsible for public information.
- ☐ Check client-approved specifications, availability, pricing terms and the date each detail was last confirmed.
- ☐ Separate completed work, current construction and illustrative renders. Label each accurately.
- ☐ Assign an authorised reviewer for project particulars, applicable disclosures and publication permissions.

## 02 / The project story

- ☐ Describe the intended buyer or occupier and the practical need the project addresses.
- ☐ Explain the location and design details with verified information, not unsupported investment promises.
- ☐ Use a consistent project identity across the brochure, website, enquiry messages and sales presentations.
- ☐ Make the next step explicit: view details, share requirements or discuss a possible site visit.

# Make the next step useful.

A marketing enquiry should give the person and the receiving team enough context for a relevant conversation. Do not add unnecessary friction or collect sensitive records.

## 03 / Buyer fit

- ☐ Choose the minimum useful requirements: location preference, property category, budget range and timing.
- ☐ Explain why each required field is needed and keep optional questions genuinely optional.
- ☐ Do not ask for identity documents, financial account information or sensitive records in a marketing enquiry form.
- ☐ Record the prospect's preferred response channel and permission for the communication you intend to send.
- ☐ Define how the team handles enquiries that are outside the project's location, scope or availability.

## 04 / Enquiry handoff

- ☐ Assign one responsible contact or team to every accepted enquiry.
- ☐ Keep a source, creation time, current status and next agreed action for each enquiry where available.
- ☐ Test the form on mobile, including invalid inputs, duplicate submissions and unavailable delivery services.
- ☐ Confirm receipt only after the configured destination actually accepts the enquiry.
- ☐ Keep the agency's campaign work separate from the client team's response and sales responsibilities.

# Record what actually happened.

Review the client team's recorded handoffs and outcomes alongside the delivered marketing work. Keep uncertainty and attribution limits visible.

## 05 / Site visit and follow-up

- ☐ Confirm the property, meeting point, time, contact person and practical visit instructions with the client team.
- ☐ Distinguish requested, scheduled, attended, rescheduled and cancelled visits.
- ☐ Record the visitor's relevant questions and the next mutually agreed action.
- ☐ Use actual recorded visit and proposal outcomes. A click or map direction request is not an attended visit.

## 06 / Trust and evidence

- ☐ Use only authorised project imagery, accurate credits and verified professional or certification details.
- ☐ Ask for genuine feedback neutrally. Do not invent reviews, testimonial quotes or client identities.
- ☐ Assign a reviewer and an operational owner for complaints and corrections.
- ☐ Before publishing results, document the starting position, period, source, contribution and limitations.

# Turn the review into a working brief.

Choose a few concrete improvements. Give each an owner, a required input and a review date. This sheet is for planning, not a promise of results.

Project / business

Primary audience

Authorised information reviewer

Enquiry-response owner

| Priority gap | Next action / input | Owner / date |
|--------------|---------------------|--------------|
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This is a proposed operating framework. Confirm project details, permissions and relevant publication requirements with the appropriate reviewer. No enquiry, booking, conversion or investment-return outcome is guaranteed.