



Your agent picks up the conversation instead of starting it.

Everything the prospect shared in the concierge, in one page: what they want, what they chose, when they want to tour, and the questions to prepare before the first callback.

RECEIVED	SOURCE	BRIEF COMPLETENESS
Saturday, 9:12 PM · after hours	Property website concierge	7 of 7 handoff fields answered

PROSPECT SNAPSHOT

MOVE-IN TIMING	Within 60 days
FLOOR PLANS	One bedroom · up to \$2,800 monthly
MATCH PREFERENCE	Include close alternatives
TOP PRIORITIES	Natural light · private outdoor space
TOUR FORMAT	In-person tour
REQUESTED TIME	Saturday, August 15 at 1:00 PM · pending confirmation
QUESTIONS	Monthly cost and required fees · parking

TOUR SHORTLIST

Sage · One bedroom 760 sq ft · available Sep 25 · private outdoor space	\$2,760/mo Special on select terms
Aster · One bedroom 705 sq ft · available Sep 1 · natural light	\$2,480/mo Special on select terms

SUGGESTED NEXT ACTIONS

01	Confirm live availability, monthly cost, and current specials for Sage and Aster.
02	Confirm the in-person tour for Saturday, August 15 at 1:00 PM, or offer the closest available alternative.
03	Prepare to discuss monthly cost, required fees, and parking before the tour.
04	Keep the next strongest apartment ready as a backup if availability changes.

WHY THIS BRIEF EXISTS

TODAY	A portal lead arrives with a name, a phone number, and a floor plan guess.
WITH THE CONCIERGE	The first call starts at the shortlist, with the tour time and questions already on the table.