RE MEDIA SYSTEMS

FIELD GUIDE 04

Realtor Client Starter Kit

A practical conversation, briefing and follow-through kit. Learn what the agent needs, confirm the scope and make the next step easy.

A practical system. A useful next step.

Use the steps, keep the checklist and adapt the plan to the property, your equipment and the agreed brief.

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01 / START WITH THE JOB

Ask before proposing

Use this conversation when an agent has asked about your services or agreed to discuss a job.

- ☐ What is the property, where is it and when does it need to go live?
- ☐ Which media are needed: photography, floor plan, video, aerial or another defined deliverable?
- ☐ Who will use the media, where will it appear and are there other intended users?
- ☐ What must the coverage show? Ask about important features, restrictions and difficult spaces.
- ☐ Is the home prepared? Who handles access, occupants, pets and permission to photograph?
- ☐ What delivery timing and file requirements have been agreed or requested?
- ☐ Who approves the work, who receives delivery and who handles the booking or invoice?
- ☐ What would make this assignment easy for the agent, and what caused friction on previous jobs?

Turn the answers into a short brief

Repeat back the agreed deliverables, property conditions, access, timing and next action. If an important answer is missing, resolve it before confirming a quote or appointment.

A public email address or a collected contact is not the same as a newsletter subscription. Record permission and follow the rules that apply to your communication.

02 / CONFIRM THE SCOPE

A reply after an agent asks

Adapt the wording to the actual conversation. Replace bracketed fields with verified details before sending.

Subject: Photography for [property / job]

Hi [first name], Thanks for asking about media for [property / job]. Based on your brief, the proposed work is [included deliverables and coverage], with [agreed delivery timing].

The proposed fee is [your quote, with applicable tax treatment stated]. It covers [scope / intended use]. [Any requested addition] would need a separate confirmation before we add it.

The next step is [specific booking or briefing action]. Please confirm [access / readiness / outstanding question], and I can confirm the appointment details.

[Your name] [Your business and contact details]

Before you send

Check the property, recipient, scope, quote, timing and link. Use only services, terms and outcomes you actually offer. Keep a copy of what was agreed.

This is a communication template, not a supplied contract or licensing agreement. Use your own reviewed booking terms and usage arrangements.

03 / PREPARE THE APPOINTMENT

Make the shoot easier to run

Send the preparation information that fits the property and the services booked.

- ☐ Confirm the address, appointment time, access contact and parking or entry instructions.
- ☐ Confirm who prepares the property and which rooms or features are essential.
- ☐ Ask the responsible person to manage occupants and pets, private items, keys and restricted areas.
- ☐ State any weather or access dependency relevant to the services actually booked.
- ☐ List the agreed media and keep floor plans, video, aerial and twilight work on their own time budgets.
- ☐ Confirm the delivery contact, agreed timing and any verified platform requirements.

Subject: Ready for [appointment / property]?

Hi [first name], the appointment is [date / time] for [agreed scope]. Please confirm [access arrangement] and let me know about [outstanding item]. Here is the preparation information we discussed: [your approved checklist / link].

If anything changes with readiness or access, please contact [business contact] so we can agree on the next step. Thank you, [your name].

04 / DELIVER AND FOLLOW THROUGH

Close the loop clearly

A useful handoff confirms what is ready and what the client should do next.

Subject: Media ready for [property / job]

Hi [first name], the agreed [deliverables] for [property] are ready here: [verified delivery link]. Use [download / access instructions] and contact [business contact] if you have trouble opening the files.

The delivery includes [actual completed scope]. [State any agreed outstanding item or revision accurately.] Thank you, [your name].

One agreed follow-up

Hi [first name], I am following up on the [quote / delivery] we discussed for [property]. Is [specific outstanding item] resolved, or would [one practical next action] help? [Your name and business contact].

Keep the follow-up useful

Send it within the permission and context of the conversation. Record the outcome, honour requests to stop and avoid adding someone to a marketing list without the appropriate consent.

Ask for feedback after completion

What made the booking, shoot or delivery easy? What would you change next time? Use the answer to improve your process rather than promising a result you have not demonstrated.

05 / KEEP A CLIENT RECORD

Remember the useful details

Keep a concise business record and only the information you need for the work.

Agent / business and preferred business contact

Permission / request: date, context and agreed follow-up

Property, deliverables, intended use and timing

Next action, responsible person and agreed date

After delivery: feedback and one improvement

CRTC: consent, identification and unsubscribe guidance

https://crtc.gc.ca/eng/com500/faq500.htm/

Prepared October 2026. Templates require your verified details before use. Do not send a proposal, promise, price or follow-up that differs from what you actually agreed or offer.