

PARTNER INTELLIGENCE · INTAKE FORM

PARTNER INTELLIGENCE BRIEF

Fill this out and send it to our team. We'll research the business and send back a designed PDF brief.

HOW TO USE THIS FORM

Fill this out digitally or by hand, then send the completed form to:

fairwaywestmarketing@fairwaymc.com

Our team will research the business and email your Partner Intelligence Brief back as a designed PDF.

Step

WHO ARE YOU RESEARCHING?

Select the type of business partner, then complete the matching fields below.

PARTNER TYPE

Select one

01

REQUESTED BY

YOUR NAME**EMAIL** · Where we'll send the finished brief**YOUR ROLE** · Fairway LO / agent partner / other**YOUR BRANCH / LOCATION****WHEN YOU'D LIKE TO HAVE THE BRIEF** · Optional. Meeting date or general timing helps us prioritize.**GOAL OF THIS MEETING****TYPE OF MEETING** · Select one

First Intro



Coffee Meeting



Office Visit



Event Follow-up



Partnership Conversation



Past Partner Reconnect

02

BUSINESS INFORMATION

BUSINESS, BRAND, MARKET

Fields work for any partner type (individual agent, team, brokerage, or builder).

PRIMARY NAME · Agent / team / brokerage / builder name**ORGANIZATION** · Brokerage / parent company / builder**KEY CONTACT / DECISION MAKER** · If different from above**APPROX. SIZE** · Team / agent count / production**CITY, STATE, OR MARKET****KNOWN COMPETITORS** · Other agents/teams/brokerages/builders they compete with, if known**WEBSITE URL****INSTAGRAM URL****FACEBOOK URL****LINKEDIN URL****ZILLOW / REALTOR.COM PROFILE URL****OTHER KNOWN LINKS** · YouTube, TikTok, podcast, news features, etc.

03

RELATIONSHIP CONTEXT

HOW DID YOU HEAR ABOUT THEM?**MUTUAL CONNECTIONS**

HAVE YOU MET BEFORE?

- ☐ No, first time ☐ Briefly, in passing ☐ Yes, not professionally ☐ Yes, worked together

CURRENTLY WORKING WITH ANOTHER LENDER?

- ☐ Unknown ☐ Yes, exclusive ☐ Yes, multiple ☐ No, open

WHAT YOU ALREADY KNOW ABOUT THEM

RECENT INTERACTION OR REASON FOR REACHING OUT

04

RESEARCH FOCUS

BRAND, AUDIENCE, COMPETITORS

Check what you'd like us to focus on for you.

- | | |
|--|---|
| ☐ Professional Background | ☐ Real Estate Niche |
| ☐ Target Market / Audience | ☐ Social Media / Brand Style |
| ☐ Recent Listings or Sales | ☐ Community Involvement |
| ☐ Competitive Landscape | ☐ Content Opportunities |
| ☐ Partnership Conversation Starters | ☐ Ways Fairway Can Bring Value |

05

OUTPUT PREFERENCE

Check the components you'd like in your brief. We'll send it back as a designed PDF.

- | | |
|--|--|
| ☐ Executive Summary | ☐ Detailed Profile |
| ☐ Conversation Starters | ☐ Partnership Opportunities |
| ☐ Follow-up Email | ☐ Social Engagement Ideas |

NEXT STEPS

SEND US YOUR COMPLETED FORM

1. Save this completed form as a PDF (File → Save, or File → Export).
2. Email the PDF to fairwaywestmarketing@fairwaymc.com
3. Our team will build your Partner Intelligence Brief and email it back to you as a designed PDF.
4. Save the finished brief to your Partner Briefs folder in Google Drive before your meeting.

Questions? Reach us at fairwaywestmarketing@fairwaymc.com