LISTING MANAGEMENT CHECKLIST

Property Address

PRE-LISTING

- [ ] Prepare valuation
- [ ] Preview other listings
- [ ] Call other listing agents and agents of recently sold listings
- [ ] Compare valuation with other agents in office for second opinion
- [ ] Prepare all the necessary agreements and disclosures
- [ ] Order preliminary title report

LISTING APPOINTMENT

- [ ] Discuss clients' goals
- [ ] Identify improvements at property
- [ ] Discuss pricing and timing strategy
- [ ] Decide if it is a good client/agent fit. Is this a win-win?
- [ ] Execute paperwork, disclosures, and client to-do list
- [ ] Enroll in a Home Warranty

POST LISTING

- [ ] Final review of valuation and any new market activity
- [ ] Hire photographer or take pictures
- [ ] Hire staging company
- [ ] Video tour
- [ ] Measure interior of home
- [ ] Install yard sign
- [ ] Input all the data into the MLS database
- [ ] Scan and upload disclosures and contract preparation docs to MLS
- [ ] Update any other third party sites like Zillow.com
- [ ] Update company website and personal website
- [ ] Create property website
- [ ] Upload photos or video to YouTube for SEO (Search Engine Optimization)
- [ ] Share on social media
- [ ] Advertise home on social media sites
- [ ] Schedule open house
- [ ] Prepare open house marketing materials
- [ ] Post open house on Zillow, Craigslist, or in local paper
- [ ] Prepare property brochures
- [ ] Create Just Listed postcards
- [ ] Promote listing to in-house brokers
- [ ] Promote listing to outside brokers
- [ ] Email market listing to database
- [ ] Monitor market changes, new listings/sold listings
- [ ] Contact client regarding market changes
- [ ] Answer any questions concerns from clients
- [ ] Field and answer questions from other agents and prospective buyers
- [ ] Show home to any prospective buyers who contact agent directly
- [ ] Receive offers from other agents
- [ ] Review and compare offers
- [ ] Contact buyer's lender and verify buyer's qualifications
- [ ] Negotiate and counsel client on offers
- [ ] Prepare and calculate estimated net sheets for clients
- [ ] Advise other prospective buyers (if any) of current offer
- [ ] Prepare counter offer if applicable
- [ ] Execute acceptable contract

UNDER CONTRACT OR IN ESCROW

- [ ] Send contract to title company
- [ ] Update status in MLS and other databases
- [ ] Cancel or update open house status
- [ ] Upload contracts and executed disclosure for brokerage and state requirements
- [ ] Update calendar with all dates and deadlines
- [ ] Request or send HOA documents for buyers
- [ ] Handle inspection and appraisal requests
- [ ] Negotiate inspection and appraisal issues
- [ ] Review any title insurance issues
- [ ] Present any modifications such as date changes to clients
- [ ] Prepare and schedule closing
- [ ] Attend closing
- [ ] Facilitate utility transfer and new owner questions
- [ ] Execute any remaining documents
- [ ] Verify accuracy of all closing documents

POST CLOSING

- [ ] Upload all documents for brokerage and file storage requirements

Follow up with clients regarding move out and transfer of possession

- [ ] Follow up with other agent regarding move in and possession
- [ ] Follow up with clients one week after closing to see if there are other questions