Listing Activities Checklist

Address:____
Seller:____________________________ MLS#:_________________________

Closing Atty:____
Atty Address and Contact:____
List Price:__________________________ Sales Price:_____________________
DD Date:___________________________ Closing Date:____________________

Buyer Agent:________________________ Firm:__________________________

<u>Prior to the Listing Appointment</u>

- ☐ Check county records, permits, plat maps, CRS, etc.
- ☐ Pull septic and well permits
- ☐ Review previous MLS listing of the home
- ☐ Set listing appointment with the seller
- ☐ Do a CMA to determine potential sales price range
- ☐ Review aerial maps and ownership of surrounding property
- ☐ Set up an MLS search to track new listing nearby
- ☐ Update listing presentation, print sample forms for seller, print pre-filled listing presentation in case buyer wants to sign same day

<u>Initial Listing Appointment</u>

- ☐ Review and sign Working with Real Estate Agents
- ☐ Tour the home and listen
- ☐ Discuss sellers goals/ motivation/desired timeline for selling (future plans)
- ☐ Make a list of improvements and upgrades from seller
- ☐ Make a list of needed improvements and updates
- ☐ Review age of systems, roof, appliances, etc.

- ☐ Ask seller if they have preferred contractor or if they'd like to use yours
- ☐ Discuss septic, well or any other recent test results
- ☐ Discuss HOA restrictions and amenities, are rentals allowed (short or long)
- ☐ Ask seller if they intend to exclude anything from the home's sale
- ☐ Ask seller if any items in the home are leased and not owned
- ☐ Review agency and documents needed in the transaction
- ☐ ASK for the listing!!
- ☐ Set follow-up action list and next appointment

After Initial Listing Appointment

- ☐ Send handwritten thank you note to the seller
- ☐ Prepare data to present a listing and marketing strategy
- ☐ Prepare and repair and updates strategy for the home
- ☐ Create recommended contractors list for repairs and updates needed
- ☐ Prepare listing paperwork (see Listing Forms and Actions list)
- ☐ Decide on recommended listing price for the home
- ☐ Print MLS listing input form to fill out at next listing meeting
- ☐ Determine balance on sellers mortgage (ask seller)
- ☐ Complete Seller Net Sheet
- ☐ Review all research on septic, well, flood zones, iMaps, etc.
- ☐ (See Researching Your Listing Cheat Sheet)
- ☐ Confirm HOA dues and covenants/ restrictions
- ☐ Confirm HOA transfer fee
- ☐ Determine if home qualifies for a USDA loan

2nd Listing Appointment

- ☐ Review repairs and upgrades list and suggested contractors
- ☐ Create Seller To Do list
- ☐ Set Listing/ Marketing Date
- ☐ Review and sign listing agreement
- ☐ Review and sign disclosures
- ☐ Record sellers favorite features in the home as well as any special features
- ☐ Send Docusign if you you don't meet in person
- ☐ Add lockbox and add key, explain Sentrilock
- ☐ Layout listing timeline and help seller manage the timeline
- ☐ Review showing expectations and explain Showing Time
- ☐ Remind seller of fixtures list that remain with the home

- ☐ Complete Utilities Information Sheet

Prior to Active Status

- ☐ Upload listing documents to Transaction Room
- ☐ Create partial listing in MLS
- ☐ Layout listing timeline and help seller manage the timeline
- ☐ Draft marketing language and materials
- ☐ Schedule measurements
- ☐ Schedule staging
- ☐ Schedule photographs
- ☐ Schedule sign delivery
- ☐ Finish MLS Listing
- ☐ Upload MLS Photos
- ☐ Print full MLS listing and review for errors and accuracy
- ☐ Create and upload to MLS Special Features Sheet about the home
- ☐ Create list book of information about the home and surrounding area (see List Book Items list
- ☐ Schedule Open House
- ☐ Create and print flyers
- ☐ Deliver flyers, list book, shoe covers to the listing
- ☐ Create marketing cards to place throughout the home (if desired)
- ☐ Check Comps one last time before listing goes active, confirm sales price
- ☐ Update and seller initial list price and marketing date if needed
- ☐ ACTIVATE listing in MLS
- ☐ Add Virtual Tour
- ☐ Set-up Showing Time
- ☐ Upload HOA info, disclosures, offer instructions, etc. to MLS
- ☐ Insure Seller has a copy of all signed paperwork

During Active Status

- ☐ Share Active listing with seller
- ☐ Add MLS Sheet in Active status to Transaction Room files
- ☐ Insure Sentrilock box is tied to the property address
- ☐ Post listing on social media sites (FB, IG, TT, LinkedIn, etc)
- ☐ Advertise Open House on social media
- ☐ Double check the listing on Zillow, Realtor, etc.
- ☐ Create and schedule Adwerx or other online ad

- ☐ Create and schedule email blast (ie: Mondoflyer, Zip Your Flyer, etc)
- ☐ Replenish flyers at the home
- ☐ Replenish shoe covers at the home
- ☐ Share showing data and feedback with seller regularly
- ☐ Add weeks of Adwerx or other online ads
- ☐ Discuss activity and price with seller at 2 week mark
- ☐ Confirm offers with buyers lender to insure qualification

<u>During Pending Status</u>

- ☐ Change status to "pending" in MLS
- ☐ Add MLS sheet showing PENDING to Transaction Room
- ☐ Secure DD check from buyer and deliver to seller, sign receipt
- ☐ Secure Earnest money and deposit with escrow agent, sign receipt
- ☐ Return Signed pg. 16 to buyers agent for receipt of DD and or EM/AEM
- ☐ Share next steps with seller - inspections, appraisal, closing timeline, etc.
- ☐ Prepare appraiser packet with comps, upgrades, number of offers, etc.
- ☐ Mark personal/ business calendar with DD and Closing dates
- ☐ Assist seller in filling our attorney's information sheet
- ☐ Insure seller is prepared for home inspection/radon test - utilities on
- ☐ Confirm inspection dates with buyers agent
- ☐ Discuss and confirm sellers moving timeline
- ☐ Discuss DD Request and inspection report with seller, formulate response
- ☐ Get repair quotes as needed for DD request of closing credit
- ☐ Sign DD Request and/ or Contract Amendment if needed
- ☐ Collect AEM if applicable, sign receipt, send to buyers agent
- ☐ Remind sellers to take utilities out of their name for the day AFTER closing

<u>Week Prior to Closing</u>

- ☐ Remove staging items, list book and any listing items
- ☐ Order sign removal
- ☐ Coordinate key exchange
- ☐ Double check that utilities have been changed from seller to buyer
- ☐ Insure all transaction documents are uploaded into Transaction Room
- ☐ Prepare closing gift
- ☐ Order home warranty, if applicable
- ☐ Review CD and ALTA
- ☐ If seller isn't attending closing, insure seller docs are returned to attorney

- ☐ Insure Contract Amendment has been sent to attorney
- ☐ Have check cut if United is holding EM and it is more than the commission amount owed back to United

Post Closing

- ☐ Upload Closing Disclosure and ALTA to Transaction Room
- ☐ Mark listing CLOSED in MLS
- ☐ Add CLOSED listing sheet from MLS to Transaction Room
- ☐ Send Thank you note to buyers agent
- ☐ Update client address in CRM/ KvCore
- ☐ Add reminders in CRM/ KvCore for periodic follow-up
- ☐ Add closed sale in Zillow
- ☐ Send request to seller for Google and Zillow reviews
- ☐ Photocopy CD/ALTA to send in January with tax letter