

SELLER: _____ PHONE: _____ EMAIL: _____

LISTING ADDRESS _____

LIST DATE: _____ FMLS #: _____ LOCKBOX #: _____ CBS#: _____

PRELISTING

- Pre-Listing Interview Date for walk-through

- Prepare & Deliver Pre-Listing Packet
- (BHHS Packet + About Me + All docs
+ Thank you note)
- Prepare binder of Valuation Info - Records &
CMA (Quick CMA
+ Interactive AVM + Buyside BMA)
- Prepare binder of Market Info
- (Mkt Status & Trends + Seller Power Point
+ Personal Mkt)
- NAR Settlement Information

LISTING

- Set up Zip Forms Folder
- Create DTR Room
to include all completed documents
- Receive all paperwork signed by seller(s)
 - + Listing Agreement
 - + SPD, CAD, LBP
 - + Exhibit to Listing agreement
 - + F258 in Home
Preshowing Compensation Form
 - + RESPA
 - + Anti-fraud
 - + Termite Bond
 - + Dual Entry Form (Swift)
 - + Utility Information
 - + Survey / House plans
 - + Seller info in database
 - + Home Improvement List
- Schedule
 - + Get a key from seller
 - + Staging
 - + Professional Photos/Drone
 - + Video
 - + Measurements
 - + Pre-inspection
 - + Lockbox
 - + Sign

MARKETING

- MLS/FMLS Input per office procedure
- Confirm office staff added compensation to
BHHS websites
- Write MLS descriptions
- Create marketing brochure & collateral
- Pitch the property at a Sales Meeting/Tour
- Just Listed postcard to neighborhood
- Schedule an agent caravan
- Schedule Agent Open House(s)
- Enhance Listing Online | BHHS Website, etc
- BHHS Connect
- Counter display
 - + Brochures
 - + Water
 - + Disclosures
 - + Print F258
Pre-compensation Form
 - + Feedback Cards
 - + Future Homebuyer Letter
 - + List of Improvements
 - + Business Cards
- List & Advertise on Social Media
- eCard

FEEDBACK

- Set up seller reports for weekly feedback
- Set up feedback in ShowingTime
- Call for feedback if no response to
ShowingTime
- Set expectations with client about feedback
- Weekly call? As received?
- Maintain a list of consolidated feedback
- Track marketing activities and response

BINDING AGREEMENT

- Binding Agreement Date: _____
- Closing Date: _____
- Inspection Date: _____
- Due Diligence Ends: _____
- Financing Ends: _____
- Appraisal Date: _____
(Prepare appraisal comp package and meet appraiser)
- Call Lender with Agent Approval
- Appraisal Ends: _____
- Co-op Agent: _____
- Instructions to Closing Attorney
and/or Exhibit F259
- GAR F264 Important Dates

PRECLOSING

- Order Closing Gift
- Schedule Final Walkthrough
- Review Closing Stipulations
- Confirm Repairs
- Confirm Utility transfers
- Schedule Closing
- Email all parties to confirm closing
date/location
- Lender: _____
- Attorney _____
- Send Important Dates to Sellers
+ Add to Calendar
- Send any necessary amendments to Lender
- Wiring Instructions
Confirm with Attorney

AFTER CLOSING

- Update Client's Information
in BHHS Connect
- Add Anniversary in Calendar
- Send Final Thank you
- Post Closing Follow-up Plan-Add to Calendar
- Set them up on drip campaign