

SOP: Closing Day – Delivering a Seamless Client Experience

Objective:

To ensure clients feel supported, informed, and celebrated on closing day. This SOP provides a consistent, service-driven process that helps agents guide their buyers (or sellers) through the final step of the transaction while setting the tone for long-term connection.

1. Pre-Closing Confirmation (1-3 Days Before Closing)

Purpose: Prevent surprises and provide peace of mind.

- Confirm with the buyer that:
 - The mortgage instructions are complete.
 - Funds are in place for the down payment and closing costs.
 - The lawyer has all documents and IDs.
 - Home insurance has been arranged and starts on the possession date.
 - Confirm with the lawyer that the deal is on track and if keys will be released on time.
 - Schedule and confirm the **final walkthrough** with the client and seller's agent.
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2. Final Walkthrough

Purpose: Ensure the property is in the agreed-upon condition.

- Inspect for:
 - Property cleanliness
 - Removed or left inclusions (appliances, light fixtures, etc.)
 - No new damage or leaks
 - Address and document any last-minute concerns immediately with the other party's agent or lawyer.
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3. Day-of Closing Communication

Purpose: Be available and proactive.

- Check in with the lawyer to confirm the deal has funded.
 - Communicate with the client:
 - “The deal has officially closed—congratulations!”
 - Provide key pickup instructions or meet them in person.
 - Offer to be present at the property for key exchange and welcome photos, if appropriate.
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4. Welcome Package Delivery

Purpose: Create a memorable, thoughtful first impression in their new home.

- Deliver a branded **welcome package**, which may include:
 - A personalized card or handwritten note
 - Small gift (e.g., local gift card, plant, champagne, cleaning service voucher)
 - Contact list for local services (utilities, contractors, etc.)
 - Moving day checklist or takeaway meal coupon
 - If you're unable to deliver in person, coordinate a drop-off or delivery within 48 hours.
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5. Post-Close Email

Purpose: Reinforce value and transition into the long-term relationship phase.

- Send a follow-up email including:
 - A thank-you message for their trust
 - A summary of next steps (e.g., change of address checklist)
 - Invitation to reach out for anything they need—"I'm still your Realtor!"
 - Reminder they'll hear from you again (anniversary, check-ins, events)
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6. Internal CRM Update

Purpose: Ensure the client is entered into long-term nurture systems.

- Update CRM with final sale date, client tags (Closed, Buyer, Year, etc.)
- Add them to:
- Home Anniversary Program

- Newsletter Distribution
 - Customer Appreciation Events List
 - Quarterly Contact Campaign
 - Schedule next touchpoint in 1-2 weeks for a check-in.
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7. Optional Extras (Stand Out Moments)

Purpose: Go above and beyond when possible.

- **Photo or video** with “SOLD” sign (with permission) for social media + client memory
 - Offer to take a family photo in front of the home
 - Help troubleshoot moving day logistics (e.g., service delays, local contacts)
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Tone & Language Tips for Closing Day:

- Be calm, positive, and reassuring.
 - Use phrases like “I’ve got you covered,” “Today is about celebrating,” or “Welcome home.”
 - Anticipate stress and offer solutions before problems escalate.
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Revision #2

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