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.

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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)

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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