Listing Checklist

A smooth listing process starts with solid preparation. This section includes a comprehensive, customizable checklist that helps agents stay organized from pre-listing to launch day. Use it to track every detail — staging, paperwork, marketing, and more — ensuring nothing gets missed. Whether you're new or experienced, this checklist keeps your workflow tight and your clients confident. It's your go-to tool for delivering a consistent, professional experience every time.

- Checklist
- Listing Paperwork

Checklist

Below is a sample listing checklist. If you'd like to customize or print it, simply click the link. To make edits, be sure to either download the file or make a copy to your own Drive.

CLICK - DOC Listing Checklist

Key Date Tracking

Pre-Inspection Date _____

Staging Date _____

Cleaning Date _____

MLS Data Sheet Signing (final forms) _____

Listing Live Date _____-

First Open House Date _____

Key House Info

Square Footage _____

Age Of Home _____

Age Of Shingles _____

Age Of Windows _____

Age Of Furnace _____

Any Defects Needing Disclosure _____

Property Taxes _____

Rental Items _____

** Bedrooms, Bathrooms, Basement, Garage Spaces and readily known information can be easily found

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Pre-Listing Checklist

- ☐ Initial Basic Information Gathering
- ☐ Book Listing Presentation
- ☐ Drop off Pre-list Package (optional?)
- ☐ Research
- ☐ Print Property Line Report
- ☐ Print Geowarehouse Report
  - ☐ Buy Title/Parcel Report
  - ☐ Buy Square Footage Report
- ☐ Check area influences
- ☐ Open Permits
- ☐ CMA Done
- ☐ Listing Presentation Done
- ☐ Confirm If Holding Offers
- ☐ Prepare Pre-List Paperwork
- ☐ RECO Information Guide Signed
- ☐ Listing Agreement Signed Exclusive
  - ☐ Complete Schedule “A” with services
- ☐ Form 244 - Seller’s Direction Re Property/Offers (If holding offers)
- ☐ Post Listing Presentation Gift
- ☐ Create Shared Drive For Client/Agent Form Access
- ☐ Schedule Auxiliary Services
- ☐ Photography
- ☐ Videographer
- ☐ Drone
- ☐ Spotlight Marketing
- ☐ Stager
- ☐ Cleaner

- ☐ Pre-Home Inspection
- ☐ Order Sign Up

- ☐ Prepare MLS Listing Paperwork
  - ☐ MLS Data Sheet done
  - ☐ Listing Draft Completed and Signed by Client
  - ☐ Listing Agreement for MLS Completed w/Schedule A including Services and Signed
  - ☐ Fintracker completed using Fintracker App
  - ☐ Seller’s Direction re Property/Offers (Form 244) (if holding offers)
  - ☐ Listing Information Sheet (Appointment Instructions) to Front Desk

- ☐ Deliver Home Owner Listing Package
  - ☐ Install Lock Box on Front Door
  - ☐ Remove Shoes Signs
  - ☐ Do not use washroom signs
  - ☐ Printed Feature Sheets
  - ☐ Any additional items.. Cameras, Candles, Nice Touches

- ☐ Pre-load Comments on Spotlight Website For Google SEO
  - ☐ Load Listing as a Draft (Day Prior. Unless already done as a Data Sheet)
  - ☐ Schedule Just Listed Flyers to go out to Area Homes

First Day on the Market

*Listings should be already loaded and ready to go at least a day prior

- ☐ Publish Listing Live by 9:00am
- ☐ Confirm Property Sign is Up
- ☐ Start Boost Campaign on Social Media
- ☐ Confirm Realtor.ca and Website has Listing

- [ ] Call Client to Notify Live and Check Listing
- [ ] Book and Promote Open House
- [ ] Check Schedule B and any Attachments
- [ ] Set up a Daily Prospect Search for New Comparable Listings for Seller
- [ ] Login to Brokerbay and Confirm Appointment Info and Map Location

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First Week on the Market

- [ ] Call Agent that Showed Property for Feedback
- [ ] Daily Call to Client for Updates and Feedback
- [ ] Social Posting and Videos
- [ ] Door Knock Area with Flyers - New Listing
- [ ] Door Knock Area with Open House invites
- [ ] Internet Search for Online Exposure

Weekly

- [ ] Weekly Stats Email to Client
- [ ] Daily Showing Feedback Calls
- [ ] Daily Feedback With Client

Offer Day

- [ ] Register on Brokerbay
- [ ] Book Presentation Time and Location
- [ ] Confirm Notifications to Showing Agents
- [ ] Call all Previous Showing Agents to find More Interest
- [ ] Prepare any Support Documents

- [ ] Schedules
- [ ] Comparables
- [ ] Surveys
- [ ] Rental Contract?
- [ ] All Research

Conditional Period

- [ ] Decide if Showings will Continue During Conditional Period
- [ ] Schedule Reminders on Conditions
- [ ] Help Facilitate Inspections and Appraisal
- [ ] Any Follow up day before Condition Expiry with Co-op Agent

After Firm

- [ ] Turn Showings Off, if not already done so
- [ ] Congratulations to Seller, Gift?
- [ ] Facilitate Lawyer Information
- [ ] Schedule Reminder in Calendar
  - [ ] 30 Days out Check in
  - [ ] 15 Days out Check in
  - [ ] 7 Days out Check in
  - [ ] 1 Day out Check in
  - [ ] Day of closing
- [ ] Communicate Further Process up to Closing date
  - [ ] Consider Bridge Financing if needed
  - [ ] Moving Company
  - [ ] Change of Utilities
  - [ ] Paperwork to Lawyer
  - [ ] Meeting with Lawyer
  - [ ] Keys and day of closing
  - [ ] Staging Take down
- [ ] Send any Moving Support Documents
- [ ] Just Sold Flyers to Area Homes

- ☐ Door Knock Area for Potential New Listings
- ☐ Closing Day Gift
- ☐ Ask for Google Review
- ☐ Order/schedule Sign Down

Post Closing Nurturing “REALTOR® for Life”

- ☐ Update CRM
- ☐ Birthday
- ☐ New Address
- ☐ Any notes
- ☐ Any Drip Campaign
- ☐ Closing date Anniversary
- ☐ Confirm Clients are on the Mail Newsletter Program
- ☐ Social Posts
- ☐ Second Door Knock
- ☐ Second Post Card
- ☐ One Week Call
- ☐ One Month Call
- ☐ 3 Month Call

Your REALTOR® For life Program should take over from here. Always building a future referral network through relationship building and a consistent marketing program.

Listing Paperwork

All your listing paperwork is located in WebForms or SkySlope. You can access both platforms by signing in through your MLS system of choice (IMS or REALM). We've created custom templates for our agents with pre-populated forms and commonly used clauses to save you time and ensure consistency. For step-by-step guidance on using these tools, log in to Xsel using the link below.

Xsel Learning Management System

*****Bonus - Our Virtual Offer System makes writing offers even easier by generating them for you — just fill in the details and go. You must be using your Google Century 21 Email Address to use.**

Click Here For Virtual Offer.ca

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