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.

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