Offers

The “Doing an Offer” stage is where the agent takes on the role of advisor, negotiator, and detail manager, guiding buyers through the process of drafting and submitting an offer on a chosen property. This includes explaining the terms and conditions of the agreement, identifying key dates and clauses, and ensuring the offer reflects the buyer’s goals while remaining competitive. Agents prepare the paperwork accurately, review it thoroughly with clients, and communicate the offer efficiently to the listing agent. Confidence, clarity, and speed are critical in this phase, as it often sets the tone for successful negotiation and moving toward a firm deal.

- SOP: Creating an Offer Using SkySlope Forms
- Offer Checklist
- Winning in Multiple Offers

SOP: Creating an Offer Using SkySlope Forms

Objective:

To ensure agents use the correct brokerage templates and standardized clauses to prepare a compliant, professional, and complete offer package for clients.

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1. Log Into SkySlope

- Go to your Board Login and Click on SkySlope
- You Should be in **SkySlope Forms** (not SkySlope Transactions)

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2. Start a New File for the Offer

- Click on **“Create Transaction”** or **“Start New File”**.
- Enter the property address (if not yet on MLS, enter it manually).
- Select the **Transaction Type**: *Purchase* or *Residential Lease*.
- Link to the MLS, if available, to auto-fill property data.

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3. Select the Correct Brokerage Template

- From the templates list, choose your **brokerage-specific offer package**, e.g.:
- *C21 Heritage – Buyer Offer Package*
- *Residential Lease – Tenant Offer Package*
- These templates will include:
- Standard forms required by the brokerage and RECO.
- Pre-entered brokerage clauses are in relevant sections (Schedule A, etc.)

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4. Complete Client & Offer Information

Fill in:

- Buyer’s legal names
- Offer price
- Deposit amount and method
- Irrevocable time
- Closing date

- Chattels & fixtures

Tip: Double-check client name spellings and legal identifiers.

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5. Review & Customize Pre-Loaded Clauses

- Go to **Schedule A.**
- Review all **pre-entered brokerage clauses**—these may include:
- Home inspection
- Financing conditions
- **Add or remove clauses** based on client circumstances.
- Use clause library or saved personal clauses if needed.

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6. Review Required Forms Checklist

Typical buyer offer packages may include:

- **Agreement of Purchase and Sale (Form 100)**
- **Form 801**
- **Buyer Representation Agreement**
- **RECO Information Guide**
- **Confirmation of Co-operation and Representation (Form 320)**
- **Other Brokerage Schedule B (Attached to listing or call Agent)**
- **Clause Addendums, if applicable**

Note • **FINTRAC – Individual ID Verification and Receipt of funds should be done in the FINTRACKER APP**

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7. Sign the Offer

- Click **“Prepare for Signature”**.
- Choose **SkySlope DigiSign**
- Set signing order and client contact info.
- Send documents for e-signature.

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8. Save & Export Final Package

- Once signed, download the full offer package as a PDF.
- Save a copy to your **deal folder** or **SkySlope Transaction Record**.
- Send the offer to the listing agent per your standard submission procedure (email, DocuSign Room, etc.).

** IF you are doing a Lease - Make sure you use the Ontario Standard form of lease

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9. Post-Submission Checklist

- Confirm receipt with the listing agent.
- Upload the signed offer to **SkySlope Transactions** under the correct deal file.
- Mark the offer status: “Submitted,” “Countered,” or “Accepted” when applicable.
- You may hand in the documents to the front desk for them to submit the deal

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Compliance Tip

Always use the **brokerage-approved templates** and **clause packages** to ensure compliance with office policy, RECO standards, and TRESA regulations. Double-check for:

- Missing initials or signatures
- Incomplete schedules
- Proper irrevocable times
- Proper use of representation documents

Offer Checklist

Pre-Offer Preparation - (Representation and buyer presentation should be done)

- ☐ Buyer(s) questions
- ☐ Open the line of communication with Mortgage Specialist
- ☐ Review MLS listing and attachments
- ☐ Initial call to listing agent to ask questions
- ☐ Research - Print Property Line Report
- ☐ Research - Print Geowarehouse Report
- ☐ Research - Check municipal and area influences
- ☐ Research - Mini Market Analysis
- ☐ Communicate with Buyer(s) to review construction of offer and presentation Strategy - Conditions, Inclusions, Irrevocable, etc.

Construct Offer and Supporting documents

- ☐ VirtualOffer.ca to help - Input information
- ☐ Login to Skyslope - Select Template
- ☐ RECO Brochure and Representation Should already be done
- ☐ Form 801
- ☐ Confirmation of Representation - Agency & Commission
- ☐ Construct your Agreement of Purchase and sale
- ☐ Review and add listing brokerage Schedule “B”
- ☐ Review with your Buyer
- ☐ Get your signatures and initials
- ☐ Fintracker done on individual(s)

- [ ] Register the Offer - Request confirmation

Presentation of offer

- [ ] In-person if possible
- [ ] Submit offer - Explain strengths
- [ ] Negotiate offer - In writing
- [ ] Offer acceptance - Review Agreement
- [ ] Deliver complete documents to Client
- [ ] Arrange deposit delivery - Receipt & FINTRAC Receipt of Funds

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After Acceptance

- [ ] Sales Information Sheet
- [ ] Book Home Inspector
- [ ] Communicate with Mortgage Specialist
- [ ] Schedule dates in calendar -Home Insp - condition expiry - check in - closing
- [ ] Facilitate fulfillment of conditions & terms
- [ ] Submit any additional documents to brokerage
- [ ] Notification weekly on outstanding paperwork
- [ ] Verify & sign trade record sheet
- [ ] Weekly check-in
- [ ] Assist client and listing agent until closing
- [ ] Post Sale Moving Checklist - After Firming Up

Closing Day & Beyond

- ☐ Make notes in CRM
- ☐ Schedule an Occasion - Home Anniversary in CRM
- ☐ Verify successful closing
- ☐ Advise client to immediately check property condition, chattels & fixtures
- ☐ Enter notes and anniversaries in CRM

PDF Download - Offer Checklist

Winning in Multiple Offers

Representing Buyers in Multiple Offers

Purpose:

To outline a clear, step-by-step process for representing buyers in a competitive, multiple-offer environment. This procedure ensures that clients are fully prepared, protected, and positioned to win while remaining compliant and professional.

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1. Prepare the Buyer Early

A winning offer starts well before offer night. Set the foundation with strong education and documentation:

• Conduct a full **Buyer Presentation** to set expectations.

• Review and complete a **Buyer's Checklist** (include financing, timelines, preferences).

• Ensure the buyer is **pre-approved** with a reputable mortgage specialist you trust.

• Sign a **Buyer Representation Agreement** to formalize your relationship.

• Conduct a **Comparative Market Analysis (CMA)** for the area and educate your client on likely price ranges.

• Discuss the risks of waiving conditions (e.g., home inspection, financing) and have the buyer sign **OREA Form 127 – Buyer Acknowledgement of Conditions Not Included** when necessary.

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2. Finding and Researching the Property

• Check **REALM daily** to stay ahead of new listings.

• Know your inventory and be quick to react.

• Research properties in advance:

• Use **GeoWarehouse**, public records, and municipal data to verify property information.

• Review zoning, permitted uses, and check for existing surveys or easements.

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3. Understanding and Using Bully Offers

• A **Bully Offer** is submitted before the scheduled offer date in hopes of beating competition.

• If you’re using this strategy, **bring your absolute best** offer early, with strong price, terms, and deposit.

• This strategy can be used regardless if the listing allows for pre-emptive offers.

• Clearly communicate the strength of your offer and be prepared to act quickly.

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4. Writing a Strong Offer

Your offer package should be clean, clear, and compelling. It should include:

• A **competitive price** aligned with or ahead of market value.

• A **strong deposit**, ideally included with the offer as a copy or certified confirmation.

• **Minimal or no conditions**, where appropriate and with proper buyer disclosure (see Form 127).

• A **buyer’s personal letter** to connect emotionally with the seller (if appropriate).

• **Pre-approval letter** from their lender.

• Full, clean, and professionally typed offer with Form 801 attached.

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5. Offer Communication Strategy

Communication is key in winning multiple offers:

• Call the listing agent early to introduce yourself and your client.

• **Register your offer early** via BrokerBay and confirm receipt.

• Stay in contact throughout — confirm all documents have been received and ask about offer presentation details.

• If possible, **present in person** or by live video to humanize your buyer.

• Keep communication professional and timely. Always follow up written messages with a call.

• Encourage the listing agent to **give you another chance** if a top offer is close.

• Avoid relying on texts or casual email for negotiation — ensure everything is in writing and properly documented.

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6. Manage Expectations & Ask the Right Questions

Prepare your client mentally and emotionally for the process by asking:

1. “Will you be upset with me tomorrow if it sells for more than you offered?”

2. “Will you be upset with me tomorrow thinking I pushed you too hard?”

These questions help the buyer reflect honestly on their comfort level and guide you in delivering the right offer strategy.

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7. Post-Offer Etiquette

• Win or lose, follow up with the listing agent to gather feedback.

• If your offer was not successful, debrief with your buyer and revisit other options quickly.

• If accepted, confirm timelines, send the deposit, and transition to next steps (inspection, lawyer, lender).

Training for Winning in Multiple Offers