# Listing Intake to Sold

This section guides administrative team members through the complete listing process, from the first intake and property research through marketing, offers, closing, and long-term client follow-up. You will learn how to prepare pre-listing materials, organize listing paperwork, coordinate marketing activities, monitor feedback, support offer presentation, and help ensure all documents and deadlines are handled accurately. The goal is to create a consistent, professional listing experience that supports the agent, protects the brokerage, and provides exceptional service to the seller. The process does not end when the property sells—strong follow-up and ongoing communication help turn satisfied clients into repeat and referral business through the REALTOR® for Life approach.

# Listing Process Checklist

**This checklist provides a complete, step-by-step overview of the listing process, from the initial intake and property research through marketing, offers, closing, and post-sale follow-up. It is designed to help the listing agent and administrative team stay organized, track progress, meet important deadlines, and ensure that no key step is overlooked.**

**The checklist can also serve as a strong starting point for building a digital workflow using tools such as Google Keep, Asana, Monday.com, or another project management platform. Tasks can be added, assigned, scheduled, and tracked to create a more consistent and efficient listing system for your business.**

# Listing Process 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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# Property Research Checklist

## 1. Confirm the Property Information

Before ordering reports, confirm the following information with the seller:

- Municipal address
- Seller’s legal name
- Property type
- Current property use
- Approximate lot size
- Number of bedrooms and bathrooms
- Approximate square footage
- Ownership date
- Recent renovations or additions
- Rental equipment
- Existing tenancies
- Known easements, encroachments, rights-of-way, or shared driveways
- Septic, well, or rural servicing information, where applicable

The municipal address and owner information should be verified before purchasing any paid reports.

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## 2. Print the Property Line Report

Obtain and save the available property line or mapping report.

Review the report for:

- Approximate lot boundaries
- Lot frontage and depth
- Property shape
- Road access
- Laneways or shared driveways

- Nearby structures
- Possible encroachments
- Easements or rights-of-way shown on the mapping
- Proximity of buildings to lot lines
- Irregular boundaries

Property line mapping is generally approximate and should not be represented as a legal survey.

Where property boundaries are important to the sale, ask the seller whether a current survey, reference plan, site plan, or other legal document is available.

## Escalate When

- A building appears close to or over a property line
- A driveway appears to cross another property
- Fencing does not appear to follow the mapped boundary
- The seller is uncertain about the lot limits
- The property includes a shared laneway or private road
- The property line report conflicts with the seller’s understanding

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# 3. Print the GeoWarehouse Report

Obtain the available GeoWarehouse property report and save it in the listing research folder.

Review the report for:

- Registered owner information
- Legal description
- Property identification number
- Lot dimensions
- Sales history
- Mortgage information, where available
- Property type
- Year built, where available
- Site area
- Assessment information
- Estimated square footage
- Nearby comparable sales
- Mapping and aerial imagery

Information obtained from GeoWarehouse should be compared with seller-provided information, municipal records, previous listings, and other available reports.

Do not assume that all GeoWarehouse information is current or accurate.

## Escalate When

- The registered owner does not match the person signing the listing agreement
- The legal description appears incomplete
- The property type is different from the seller's description
- The estimated square footage differs significantly from other sources
- The sales history contains unexplained transactions
- The lot dimensions differ from previous listings or seller information

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# 4. Purchase the Title or Parcel Register

Purchase a current parcel register or title report for the property.

Review the report for:

- Registered owner names
- Ownership type
- Legal description
- Property identification number
- Mortgages and charges
- Easements
- Rights-of-way
- Restrictive covenants
- Notices
- Construction liens
- Executions or other registered interests
- Recent transfers
- Other title-related concerns

The names on the listing agreement must match the registered ownership unless proper legal authority has been confirmed.

## Escalate When

- A seller’s name does not appear on title
- An owner is deceased
- The property is held by a corporation, estate, trust, or power of attorney
- There is a construction lien
- There are unusual easements or restrictions
- A recent transfer is not understood
- The legal description conflicts with other reports
- There are concerns about the seller’s authority to list or sell

Title concerns should be reviewed with the Broker of Record, manager, or the seller’s lawyer before proceeding.

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# 5. Purchase the Square Footage Report

Obtain a recognized square footage report when the size of the property will be used for pricing, advertising, comparison, or buyer decision-making.

Review:

- Above-grade square footage
- Below-grade finished area
- Total finished area
- Exterior versus interior measurement method
- Included and excluded spaces
- Garage measurements
- Basement measurements
- Additions
- Finished attic or loft areas
- Areas with reduced ceiling height

Compare the report with:

- Seller-provided information
- Previous MLS listings
- Builder plans
- Municipal records

- MPAC or assessment information
- GeoWarehouse
- Floor plans
- On-site observations

The source and measurement method should be clearly identified whenever square footage is advertised.

## Escalate When

- Reports show materially different measurements
- A finished area may not be legally recognized
- An addition is not reflected in municipal records
- A basement is being included in above-grade square footage
- The seller insists on advertising an unsupported measurement
- The property has unusual ceiling heights, additions, or converted spaces

Do not advertise square footage that cannot be reasonably supported.

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# 6. Check Area Influences

Research positive and negative influences that may affect value, enjoyment, financing, insurance, future development, or buyer interest.

Review the immediate area for:

- Rail lines
- Airports or flight paths
- Major roads or highways
- Commercial or industrial properties
- Waste facilities
- Hydro corridors
- Pipelines
- Flood plains
- Conservation-regulated areas
- Shoreline or environmental restrictions
- Schools
- Places of worship
- Parks and recreation
- Public transit
- Construction projects

- Planned developments
- Zoning changes
- Noise, odour, traffic, or lighting concerns
- Nearby farms or agricultural operations
- Cemeteries
- Emergency services
- Future road extensions
- Heritage designations or districts

Area influences should be reviewed through available municipal mapping, planning documents, conservation authority resources, local knowledge, and an on-site inspection.

## Document Both Positive and Negative Influences

Positive influences may be used in the marketing plan when they are accurate and supportable.

Negative influences should be discussed with the seller and disclosed where required.

## Escalate When

- A planned development may materially affect the property
- The property may be in a floodplain or regulated area
- There is a nearby environmental concern
- The current use may conflict with zoning
- The property is affected by a heritage designation
- There are significant noise, odour, access, or traffic concerns
- Information cannot be confirmed

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# 7. Check for Open Permits

Contact or search the applicable municipality to determine whether there are open, inactive, expired, or unresolved building permits associated with the property.

Where available, review:

- Permit number
- Permit type
- Date issued

- Work description
- Inspection status
- Final inspection status
- Permit closure status
- Outstanding orders
- Property standards concerns
- Unapproved additions or renovations

Ask the seller about all major renovations, including:

- Finished basements
- Additions
- Decks
- Garages
- Structural changes
- Plumbing work
- Electrical work
- HVAC changes
- Secondary suites
- Pool installations
- Septic alterations
- Changes to entrances or exits

## Escalate When

- A permit remains open
- Work was completed without a permit
- A final inspection was not completed
- The property contains an unapproved secondary unit
- The physical property differs from municipal records
- There is an outstanding municipal order
- The seller is unsure whether permits were obtained

The listing agent should not state that work is legal, permitted, or compliant unless it has been verified through an appropriate source.

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# Review and Reconciliation

Once all reports have been obtained, compare the information across every source.

Confirm consistency in:

- Owner names
- Municipal address
- Legal description
- Property identification number
- Lot size
- Property type
- Square footage
- Number of bedrooms and bathrooms
- Year built
- Renovations
- Basement status
- Parking
- Property use
- Easements and rights-of-way
- Permit history

Create a written list of discrepancies and review them with the listing agent before the listing paperwork is prepared.

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# File Organization

Create a property research folder using the brokerage’s approved file storage system.

Recommended file names:

- 01 Property Line Report
- 02 GeoWarehouse Report
- 03 Parcel Register
- 04 Square Footage Report
- 05 Area Influence Research
- 06 Permit Search
- 07 Seller Documents
- 08 Research Notes and Discrepancies

All reports should be dated and retained with the listing records in accordance with brokerage policies.

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# Final Approval Before Listing

The property should not be loaded onto MLS until the listing agent has:

- Reviewed all available reports
- Confirmed the registered ownership
- Reviewed title concerns
- Reconciled square footage information
- Identified relevant area influences
- Reviewed permit information
- Discussed material discrepancies with the seller
- Obtained guidance from management or legal counsel where required
- Confirmed that all advertised property information is supportable

# Completion Standard

Property research is complete when the listing agent has sufficient reliable information to accurately prepare the listing documentation, advise the seller, establish the marketing strategy, and represent the property without making unsupported claims.