The Service Journey for Buyers, Sellers, Landlords and Tenants

Communication is at the centre of every successful real estate business. As an administrator, you are often the connection point between the lead agent, clients, team members, the brokerage, and the many professionals involved in a transaction.

Strong communication prevents small issues from becoming larger problems. It keeps priorities clear, creates a more positive team culture, improves efficiency, and directly shapes the experience each client receives.

In this session, we will focus on choosing the right communication method, setting clear expectations, creating consistent huddles and meetings, using technology to stay organized, and supporting buyers, sellers, landlords, and tenants from start to finish.

The goal is simple: keep everyone informed, keep the transaction moving, and make every client feel supported.

SESSION 3 • BUYER EXPERIENCE

Buyer Journey

What the admin helps organize from first contact to closing.

1 Initial Inquiry / Consultation
- Book appointment
- Prepare buyer package
- Gather basic needs and timeline

2 Buyer Onboarding & Representation
- Open file
- Organize paperwork / BRA
- Set checklist and next steps

3 Financing & Pre-Approval
- Coordinate mortgage contact
- Track pre-approval status
- Keep documents organized

4 Search Setup & Planning
- Set up MLS / portal search
- Organize criteria and areas
- Prepare showing schedule

5 Showings & Buyer Communication
- Book appointments
- Confirm details and directions
- Keep buyer and agent updated

6 Offer & Negotiation Support
- Organize offer documents
- Track key terms and deadlines
- Coordinate signatures and updates

7 Conditional / Firm to Closing
- Track conditions and waivers
- Send paperwork to brokerage / lawyer
- Monitor closing checklist

8 After-Sale / Client Care
- Mark file complete
- Request review / testimonial
- Add to nurture / REALTOR® for Life follow-up

ADMIN TAKEAWAY
The admin helps keep the buyer journey organized, informed, and moving forward.

Clear systems create a *better* buyer experience.

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SESSION 3 • SELLER EXPERIENCE

Seller Journey

What the admin helps organize from listing to closing.

1 Pre-Listing Consultation
- Book appointment
- Prepare seller package
- Confirm property details

2 Listing Signed & Onboarding
- Open file
- Collect paperwork
- Set checklist and timeline

3 Listing Preparation
- Coordinate photos, staging, cleaning, measurements
- Order sign and lockbox
- Prepare feature sheet / MLS info

4 Go Live / Marketing Launch
- Upload listing assets
- Schedule social media and email marketing
- Confirm BrokerBay / showing setup

5 Showings & Seller Communication
- Manage appointments
- Track feedback
- Keep seller and agent updated

6 Offers & Negotiation Support
- Organize offer documents
- Track key terms and deadlines
- Coordinate signatures and file updates

7 Conditional / Firm to Closing
- Track conditions and waivers
- Send paperwork to brokerage / lawyer
- Monitor closing checklist

8 After-Sale / Client Care
- Mark file complete
- Request review / testimonial
- Add to nurture / REALTOR® for Life follow-up

ADMIN TAKEAWAY
The admin helps keep the seller journey organized, on time, and on brand.

Clear systems create a *better* seller experience.

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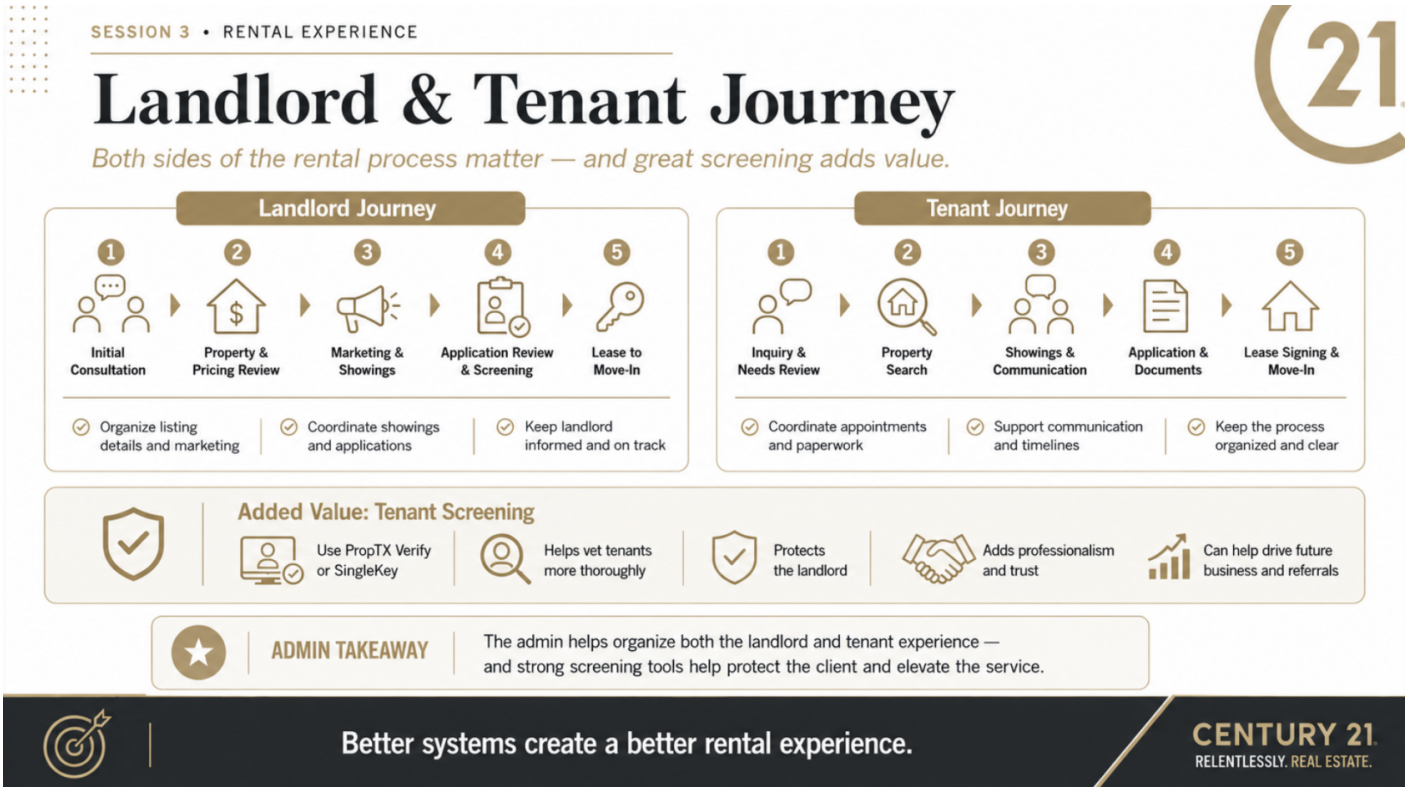

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