



# LISTING MANAGEMENT CHECKLIST



## PRE-LISTING

- ☐ Prepare valuation
- ☐ Preview other listings
- ☐ Call other listing agents and agents of recently sold listings
- ☐ compare valuation with other agents in office for second opinion
- ☐ Prepare all the necessary agreements and disclosures
- ☐ Order preliminary title report

## LISTING APPOINTMENT

- ☐ Discuss clients' goals
- ☐ Identify improvements at property
- ☐ Discuss pricing and timing strategy
- ☐ Decide if it is a good client/agent fit, Is this a win-win?
- ☐ Execute paperwork, disclosures, and client to-do list
- ☐ Enroll in a Home Warranty

## POST LISTING

- ☐ Final review of valuation and any new market activity
- ☐ Hire a photographer or take pictures
- ☐ Hire staging company
- ☐ Video tour
- ☐ Measure interior of home
- ☐ install yard sign
- ☐ Input all the data into the MLS database
- ☐ Scan and upload disclosures and personal website
- ☐ Create property website
- ☐ Upload photos or video to Youtube for SEO (Search Engine Optimization)
- ☐ Share on social media
- ☐ Advertise home on social media sites
- ☐ Schedule open house
- ☐ prepare open house on Zillow, Craigslist, or in local paper
- ☐ Prepare property brochures
- ☐ Create Just Listed postcards
- ☐ Promote listing to in-house brokers
- ☐ Prepare open house on Zillow, Craigslist, or in local paper
- ☐ Prepare property brochures



- ☐ Create Just Listed postcards
- ☐ Promote listing to in-house brokers
- ☐ Promote listing to outside brokers
- ☐ Email market listing to database
- ☐ Monitor market changes, new listing/sold listings
- ☐ Contact client regarding market changes
- ☐ Answer any questions/concerns from clients
- ☐ Field and answer questions from other agents and prospective buyers
- ☐ Show home to any prospective buyers who contact agent directly
- ☐ Receive offers from other agents
- ☐ Review and compare offers
- ☐ Contact buyer's lender and verify buyer's qualifications
- ☐ Negotiate and counsel client on offers
- ☐ Prepare and calculate estimated net sheets for clients
- ☐ Advise other prospective buyers (if any) of current offer
- ☐ Prepare counter offer if applicable
- ☐ Execute acceptable contract

#### UNDER CONTRACT OR ESCROW

- ☐ Send contract to title company
- ☐ Update status in MLS and other databases
- ☐ Cancel or update open house status
- ☐ Upload contracts and executed disclosure for brokerage and state requirements
- ☐ Update calendar with all dates and deadlines
- ☐ Request or send HOA documents for buyers
- ☐ Handle inspection and appraisal issues
- ☐ Present any modifications such as date changes to clients
- ☐ Prepare and schedule closing
- ☐ Attend closing
- ☐ Facilitate utility transfer and new owner question
- ☐ Execute any remaining documents
- ☐ Verify accuracy of all closing documents

#### POST CLOSING

- ☐ Upload all documents for brokerage and file storage requirements
- ☐ Follow up with clients regarding move out and transfer of possession
- ☐ Follow up with other agent regarding move in and possession
- ☐ Follow up with clients one week after closing to see if there are other questions