

Clients for Life

Seller Service System Checklist

Seller(s): _____

Address: _____

Setting the Appointment

- Thank the prospective seller for contacting you, show appreciation and ask how they heard about you
- Use the TMG Seller Data Sheet. Make sure that you get gull names and contact information
- Set up and confirm the date/time of the appointment, and request that all deeded owners be present
- Send a handwritten note card to the prospect immediately and thank them for contacting you

Preparing for the Appointment

- Send a handwritten note to the person who referred the prospect(s) (if applicable) and thank them
- Search the web for the prospect's name and search social media sites
- Check to see if the property has been listed or sold on MLS. Download the Client Synopsis and Attachments
- Drive by the property to assess location, neighborhood, and condition. Snap a photo from the curb
- Visit city/town hall and review the property file for permits. Complete the Public Records Data Sheet
- Create an initial draft CMA analysis within Toolkit CMA to set up a general expected price range
- Complete the Ownership Cost Per Day sheet
- Email a copy of the Seller Property Disclosure Form so that they can gather the needed information
- Prepare a seller listing packet in a TMG branded folder for the first appointment if using paper documents. (even if choose paperless, always have a spare in your care, just in case)

First Appointment

- Seller led home tour
- Ask questions, create conversation to gather information needed on the Seller Data Sheet (take notes)
- Review the Market Sales Report. Discuss the importance of understanding the local market dynamics
- Present your Listing Presentation, including the pricing conversation/CMA – ask questions throughout
- Go for a trial close
- Set an appointment for two days from now (if needed). Update the CMA and personalize the marketing plan.
- If yes, complete and sign all listing documents and provide a copy to the seller at the time of signing.

Preparing the Listing

- Install a lockbox with key, discuss showings, review Top Tips for Selling Your Home
- Ask the seller to write a letter describing why they loved living in the area or their house
- Take photos or schedule photo/video shoot
- Enter the property on to MLS (note the rules on MLS submission dates)
- Enter all information and documents into SkySlope by the time you enter the property into MLS

Servicing the Seller Client

- Send a personal handwritten thank you note
- Import listing task template to listing in SkySlope
- Install or order For Sale sign to be installed when the property is read to market. Make sure it has a property flyer holder and give the seller 100 copies of the MLS customer synopsis sheet and ask them to keep it filled. Consider directional signs for properties not on main thoroughfares
- Prepare a Home Marketing Resource Manual in a binder and place in the house

- Order “Just Listed” postcards for 100-200 closest neighbors. Include seller so they will see it
- Schedule the first Open House, enter the Open House on the MLS – choose “Public” as the type
- Set up an MLS auto email and notice to be sent to the seller(s) for all new listings, pendings and sold properties that would be considered competitors of your seller client. Copy yourself on this search
- Create a single Property Information File (PDF file) for quick and easy email response to buyer inquiries
- Canvas (hand deliver) immediate neighborhood with property flyers announcing the new listing (25 on either side of the house and 50 across the street) *See New Listing Script for Neighbors*
- Place special feature tent cards/wall cards at the property to point out highlights to prospective buyers
- Utilize social media to announce new listing
- Review a copy of the standard form Purchase and Sale Agreement for your state before an offer is presented
- Notify the sellers when the listing hits MLS, ask them to review for accuracy. Utilize an email template to also give them links to their house on other portals (Realtor.com, Zillow, Trulia, etc.) attach the MLS client synopsis
- Meet with them face-to-face every 30 days to talk about how the marketing process is going. If the property is getting good exposure and showing with no offers, it is time to talk price adjustment (“adjustment” vs. “reduction”). If it is getting good market exposure and no showings, it may also be a price problem, especially if other similar properties are going under contract
- Do something that makes them feel special and demonstrates you care. This is a stressful time for them. If you know they like a certain type of wine, drop off a bottle on a Friday night.
- At the 45-day mark, ask them what they think of your service. Could you do anything to make them happier (besides selling the house)?
- At the 60-day mark, schedule another face-to-face meeting and work for a price adjustment. Carefully analyze what is happening in the market and why their house has not sold. It is time to adjust marketing strategies, price being a critical element. This needs to be joined in their desired timing for a lifestyle change

Negotiating a Contract

- Request that all offers have a mortgage pre-qualifying letter included with the offer
- Present all offers to the seller(s), even if they do not have a pre-qualifying letter
- Discuss earnest money deposit amount with seller(s)
- Discuss inspection contingencies and appraisal with the seller(s)
- Review all terms, discuss pros and cons as well as implications
- Point out the “offer good until date” to the seller(s)
- Ensure all changes to a contract are signed or initialed and dated to be effective
- If an offer has been presented, countered and a new separate offer is received by a different buyer, the seller(s) must be told and presented with the second offer. **All offers must be presented to the seller(s)**, even after it is under contract, unless the seller(s) explicitly says no more offers are to be presented to them.
- Ensure that the seller knows that **you advise, and they decide.**

Under Contract to Post Closing

- Upon an accepted offer, ensure that initials and/or signatures are complete and dated on all documents
- Immediately provide clients with copies of all signed documents. This is a professional service and required by law
- Immediately send a handwritten congratulations note card to your client(s) and assure them you will follow up every step of the way to assure a smooth closing
- Have a conversation with the seller(s) to set expectations
- Deliver earnest money check to your Business Support Specialists/office within the time period noted on the Purchase and Sale Agreement. This is normally within 2-5 days of the effective date.
- Understand where the sellers are moving to and can you be of assistance
- Change the status of the seller listing in MLS to pending within the required timeframe for your state)

- Enter the transaction information into SkySlope and upload all TMG Under Contract Checklist documents to the SkySlope system for administrative review (day 1)
- Use SkySlope TASKS function, either use a company template or your own saved template, or create a new template to set up tasks and reminders to effectively and efficiently manage the transaction The tasks will make sure you stay on track with closing and beyond.
- Be very vigilant with the inspection contingency dates. Do not let the pass by without communication with the buyer's agents as to the status, if needed, negotiate inspection issues within the allotted time period or get a signed extension to accommodate the additional time required to satisfy the contingency issues
- Follow up with your Business Support Specialist for all file compliance review issues
- Enter all changes to the transaction into SkySlope
- Follow up with the title company to make sure that you receive the closing statement prior to closing
- Review the closing statement with your client. Make sure they understand all areas.