PRE-LISTING CHECKLIST

- ❑ Upon notice of listing appointment, update CRM with status
- ❑ Pull comparable sales
- ❑ Pull flood map from FEMA
- ❑ Pull plat from tax records
- ❑ Pull legal description
- ❑ Pull / verify school districts for property address from school district sites
- ❑ Pull & screen shot Google view of property
- ❑ Pull & print Zillow listing
- ❑ Print area highlights
- ❑ Create **CMA**
- ❑ Call any municipalities required to verify building restrictions, setbacks, zoning, sewer or septic requirements, historic restrictions
- ❑ Pull Community information: HOA, COA, Rent Restrictions, Other___.
- ❑ Create Pre-Marketing package offered by preferred lenders
- ❑ Add to client folder all listing presentation materials
- ❑ Verify sign is ready for listing delivery

LISTING CHECKLIST

- ❑ Call to schedule staging if needed
- ❑ Call to schedule photographer or schedule online
- ❑ Call to schedule sign post installation or sign delivery
- ❑ Schedule delivery of lockbox if not already at site
- ❑ Order extra keys if required and requested by client in writing
- ❑ Assign lockbox to property / be sure agent has used correct serial#
- ❑ Pre-Order marketing material from preferred lenders
- ❑ Have lender deliver sign preferred lender sign to property
- ❑ Prepare listing agreement prepared by agent for e-signatures if needed
- ❑ Create client profile in CRM or update existing stage and information
- ❑ Upload executed listing agreement to the paperless system
- ❑ Send copy of listing agreement to client with client readiness checklists and expectations video
- ❑ Photos Completed: Send copy for client's approval
- ❑ Create property marketing e-flyer & upload to client file
- ❑ Create property open house flyer & upload to client file

- ❑ Create neighbor announcement flyers & upload to client file
- ❑ Create dedicated property web-site or edit preferred lender provided property web-site
- ❑ Enter property in all MLS and have draft approved by agent prior to publish
- ❑ Send links to MLS listings to client for their approval
- ❑ Verify MLS listings are published & LIVE
- ❑ Add property to Showing Time
- ❑ Send notice to reverse prospecting list of new listing
- ❑ Post flyers/image “Coming Soon” on social media (Linkedin, Facebook (Agent’s business page), prep for Instagram) that includes the property dedicated site or link to agent site.
- ❑ Edit “Coming Soon” video completed by agent with property address, brokerage information, and agent contact info. Post video on social media (Linkedin, Facebook prep for Instagram).
- ❑ Create BombBomb email with ”Coming Soon” video and send to agent database
- ❑ Create Slidly or Ripl branded slide show for use on Social Media
- ❑ Manage all ShowingTime requests
- ❑ Call all showings and get feedback
- ❑ Pull all automatic feedback replies and compile for weekly report
- ❑ Every Wednesday send an update to the reverse prospecting list
- ❑ Every Thursday re-post highlights on social media

SALE PENDING DUTIES

- ❑ Have ”Under Contract” sign delivered to property
- ❑ Change status in MLS to “Pending”
- ❑ Update CRM status; web-site status
- ❑ Be sure client has a copy of the signed contract.
- ❑ Verify Earnest Money has been received by ”Holder” within the terms of the contract.
- ❑ Add to calendar reminders for expiration of each contingency: Due diligence/inspection, appraisal, financing, other ____.
- ❑ Send to parties anything needed to be within terms of contract and document: legal description, community disclosure, survey, etc…
- ❑ Open up a closing file with closing attorney or title company; send contract to closing agent.
- ❑ Add to CRM all contact information for closing: Selling agent, Listing agent, Lender, Closing, Inspectors, Appraiser, Vendors
- ❑ Verify with buyer’s lender they have what they need
- ❑ Create & post “Under Contract” marketing for social media
- ❑ Edit & post “Under Contract” video by agent on social media
- ❑ Create neighborhood “Under Contract” flyer for agent to disburse
- ❑ Have client fill out information form requested by closing attorney or title company

- ❑ Order home warranty if within obligations of contract
- ❑ Order insurance
- ❑ Order/schedule home inspection and/or verify date & access information
- ❑ Order/schedule appraisal and/or verify date & access information
- ❑ Order termite; environmental; soil; survey; other ____ inspections
- ❑ Order required repairs and/or verify ordered
- ❑ Verify each contingency is met prior to expiration of contingency
- ❑ Verify required repairs are completed
- ❑ Verify title work is ready and no corrections needed
- ❑ Verify any survey issues are cleared
- ❑ Schedule closing day to match contract terms and notify parties if that date is not available by closing agent.
- ❑ Schedule walk-through prior to closing
- ❑ Provide to client utility information
- ❑ Schedule staging to be removed prior to closing
- ❑ Schedule sign company to remove post at closing
- ❑ Prior to closing verify all contract paperwork is in file and any and all amendment or exhibits have been provided to closing agent.
- ❑ Send closing agent commission agreement
- ❑ Verify CD / settlement statement has been received by client for review prior to closing and client approves
- ❑ Verify closing date and time and notify all parties

POST CLOSING DUTIES

- ❑ Verify closing agent has sent electronic copy of all closing docs
- ❑ Add copy of all closing docs to file
- ❑ Change CRM & Web-Site status to “Closed”
- ❑ Change MLS status to “Closed”
- ❑ Verify sign post and/or sign was removed from property
- ❑ Verify lockbox was removed from property and returned to inventory
- ❑ Create thank you letter/package for agent to send
- ❑ Create neighborhood “Sold” announcement flyer for agent to disburse
- ❑ Put client on the quarterly follow-up task plan

PEOPLE'S CHOICE
REALTY SERVICES LLC