

# Listing Management Checklist

Listing Address:

## 1 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

## 2 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, & client to-do list
- Enroll in a home warranty

## 3 Post-Listing

- Final review of valuation and any new market activity
- Hire 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 & upload disclosures & contract preparation docs to MLS
- Update any other third-party sites like Zillow.com
- Update company website and personal website
- Create property website
- Upload photos or video to YouTube for SEO (search engine optimization)
- Advertise home on social media sites
- Schedule open house
- Prepare open house marketing materials
- Post 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 listings/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 & 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

## 4 Under Contract/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
- Handle inspection and appraisal issues
- Review any title insurance issues
- Present any modifications such as date changes to clients
- Prepare and schedule closing
- Attend closing
- Facilitate utility transfer & new owner questions
- Execute any remaining documents
- Verify accuracy of all closing documents

## 5 Post Closing

- Upload all documents for brokerage and file storage requirements
- Follow up with clients regarding move out and transfer or 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