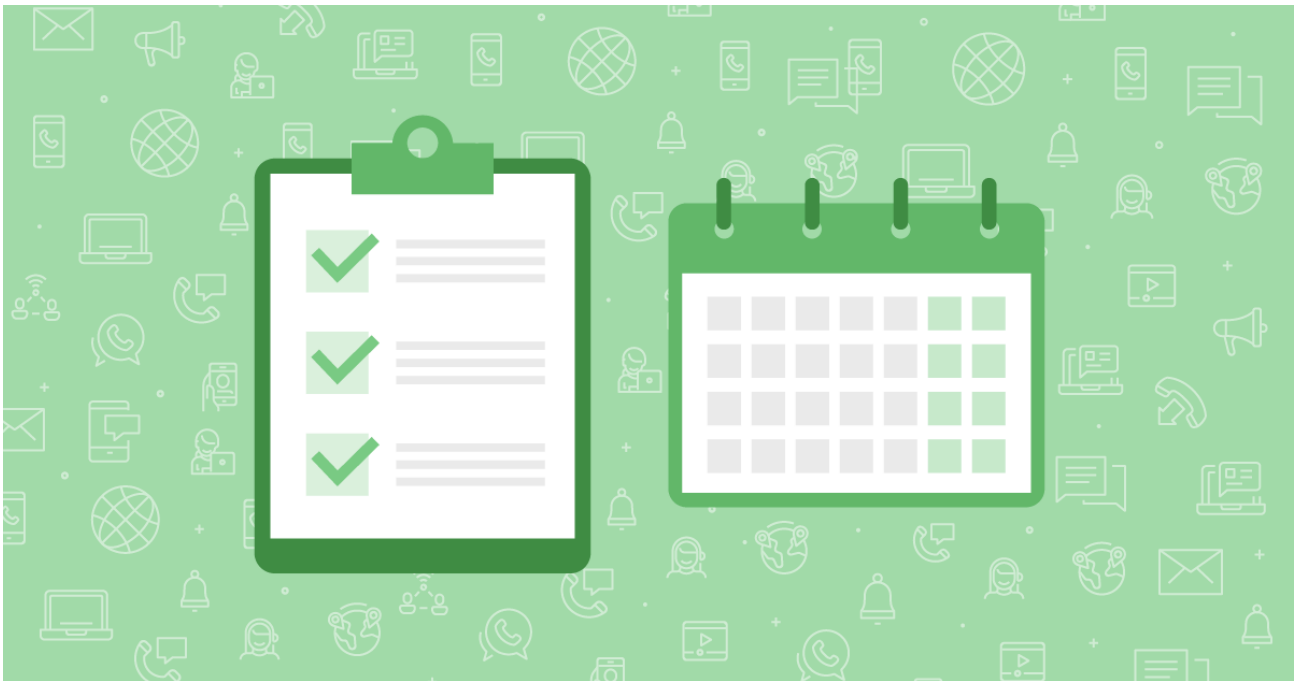


# Onboarding Checklist: Real Estate Client (Seller)

Use this real estate client (seller) information onboarding checklist to make sure your new client's needs can be met, understood, and obtained.



## GATHER CONTACT INFORMATION

- Name
- Best contact number
- Address
- Home owner insurance

## RECEIVE DOCUMENTS FROM SELLER

- Tax documents
- Mortgage statements
- Association documents
- Appraisal documents
- Home repair and maintenance
- Recipes for home improvements
- Check MLS for additional information about the home

## PITCHING TO NEW OR POTENTIAL CLIENT

- Send out a welcome email to (new or potential) client

- Schedule an appointment to view the property
- Research comps and analysis the market to create a listing price
- Create marketing material for (new or potential) client
- Send out marketing material to (new or potential) client
- Seller accepts marketing strategy and listing price
- Send out listing contract/agreement
- Receive listing contract/agreement

## **SETTING UP LISTING and MARKETING**

- Create the listing in MLS and other websites
- Begin marketing strategy
- Plan open houses (marketing, staging, etc)
- Schedule open houses
- Continue marketing strategy
- Update seller with progress
- Schedule showing with potential buyers
- Regroup if needed