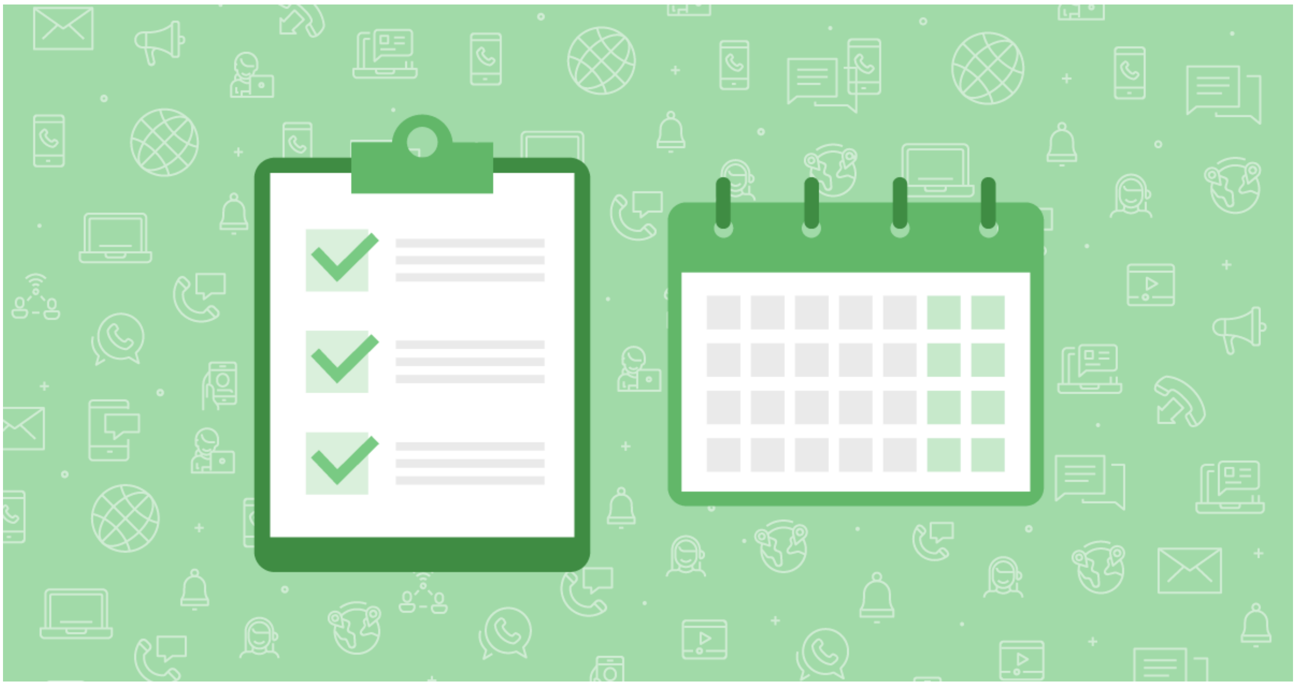
Onboarding Checklist: Real Estate Client (Seller)

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