

Seller Management Checklist



Seller (1) Name: _____

Seller (1) eMail: _____ Cell: _____

Seller (2) Name: _____

Seller (2) eMail: _____ Cell: _____

Property Address: _____

Complete Listing Documentation

- Exclusive Listing Agreement
- Property Data Entry Form Completed (and signed by Seller(s))
- Company Disclosure
- Wire Fraud Disclosure
- All Seller Consumer Brochures
- Determine "Moving To" Location & Referral Paperwork if Applicable
- Add to CRM
- Add Sellers to Report Portal of Choice: _____
- Complete Steps in "Seller's Get Ready Checklist"
- Add Checklist in appFiles and Submit Documents

- Obtain all Seller Completed Documents (prior to start date of listing)
- Broker Seller Letter Sent (3 days from start date of listing)

After Listing "Active"

- Send FMLS Agent Full Report to Seller
- Send Link to ERA Foster & Bond Website to Seller
- Send Link to Zillow & Truila to Seller
- Send Link to Realtor.com to Seller
- Complete Transaction Sheet in appFiles

After Closing

- Change Status in CRM to Appropriate Client Category
- Add to "Stay-In-Touch" Program
- Add to Marketing dataBase
- Broker Seller Closing Letter Sent