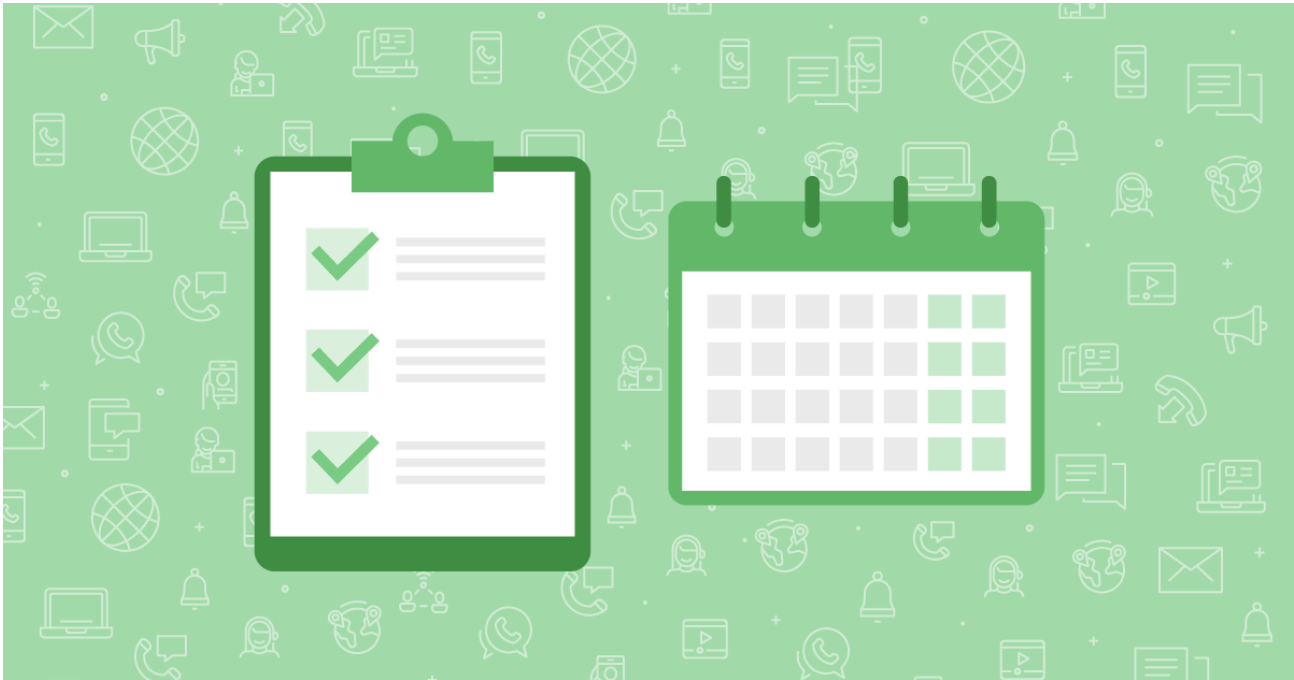


Onboarding Checklist: Real Estate Client (Seller)

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

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