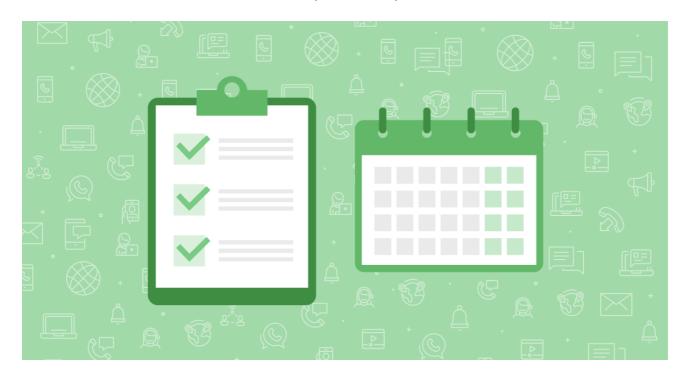
Onboarding Checklist: Real Estate Client (Seller)

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	Make and Share Free Checklists checkli.com
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