

# 4 Checklists Every Realtor Should Use

The following are 4 checklists every Realtor should use to make sure no details fall through the cracks with a listing, during the time of contract, and after the sale.

These lists are specific to the tolls we use, so I am providing these lists in a Microsoft Word Format for easy modification.

I hope these are helpful and feel free to reach out to me at [jimmy@bpfla.com](mailto:jimmy@bpfla.com) if I can help in any way. Make sure you subscribe to the podcast or the Youtube Channel to receive information as new episodes are available.

Thanks,

Jimmy Burgess

Chief Growth Officer

Berkshire Hathaway HomeServices

Beach Properties of Florida

# New Listing Checklist

Property Address \_\_\_\_\_ Owner Names \_\_\_\_\_

Owner Phone # \_\_\_\_\_ Owner Email Addresses \_\_\_\_\_

Date \_\_\_\_\_ Date \_\_\_\_\_

- | Completed | Task   | Completed | Task                          |
|-----------|--|-----------|-------------------------------|
| _____     | Executed listing agreement to seller   | _____     | Place on next in-house tour   |
| _____     | Condo/association disclosure signed  | _____     | Place on MLS tour             |
| _____     | Property Disclosure completed by seller  | _____     | Post on Instagram             |
| _____     | Have Keys Made   | _____     | Flyers in take one box        |
| _____     | Lockbox placed on home/condo   | _____     | Listing agreement on Skyslope |
| _____     | Thank you note for listing to seller   | _____     | Disclosures on Skyslope       |
| _____     | Room measurements  | _____     | Request Rental Projections    |
| _____     | Photos ordered   | _____     | FaceBook Post using Boomtown  |
| _____     | Placed in MLS  | _____     |                               |
| _____     | Sign on property   | _____     |                               |
| _____     | Lockbox on house or code received  |           |                               |
| _____     | Email fully executed listing agreement to sellers                                    |           |                               |
| _____     | Just Listed Postcards Ordered and Mailed   |           |                               |
| _____     | Just Listed marketing flyer created for online marketing                             |           |                               |
| _____     | Marketing flyer created for Print and Online Version                                 |           |                               |
| _____     | Schedule First Open House  |           |                               |
| _____     | Just listed flyer emailed to MLS or Agent Email List                                 |           |                               |
| _____     | Email client copy of just listed flyer and link to home on Boomtown site             |           |                               |
| _____     | Call Nearest 10 Neighbors  |           |                               |
| _____     | Email Just Listed flyer to email list or Boomtown Leads linked back Boomtown website |           |                               |

# Seller Contract Checklist

Property Address \_\_\_\_\_ Seller's Names \_\_\_\_\_

Seller's Phone # \_\_\_\_\_ Seller's Email Addresses \_\_\_\_\_

Contract Close Date \_\_\_\_\_ Buyer's Agent Name \_\_\_\_\_

Buyer's Agent Phone Number \_\_\_\_\_ Title Company Contact Person \_\_\_\_\_

Title Company Phone Number \_\_\_\_\_

Date

Date

Completed Task

Completed Task

\_\_\_\_\_ Fully executed contract sent to seller

\_\_\_\_\_ Set up in Past Client Drip in Boomtown

\_\_\_\_\_ Fully executed contract to title agent

\_\_\_\_\_ Set up Boomtown EAlert for future potential buy

\_\_\_\_\_ Fully executed contract in Skyslope

\_\_\_\_\_ Closing gift purchased and delivered to seller

\_\_\_\_\_ Condo Docs/HOA C&R to buyer's agent

\_\_\_\_\_ Request review with link to Trulia/Realtor.com

\_\_\_\_\_ Seller Disclosure sent to buyer's agent

\_\_\_\_\_ Just Sold postcards ordered and mailed out

\_\_\_\_\_ Moved to Pending in Skyslope

\_\_\_\_\_ Call nearest 10 neighbors about sale

\_\_\_\_\_ Notify rental agency of contract

\_\_\_\_\_ Thank you note mailed to seller

\_\_\_\_\_ Receipt of EMD to Seller

\_\_\_\_\_

\_\_\_\_\_ Receipt of EMD loaded in Skyslope

\_\_\_\_\_

\_\_\_\_\_ Enter in MLS as Pending

\_\_\_\_\_

\_\_\_\_\_ Fully Executed Seller Disclosure loaded in Skyslope

\_\_\_\_\_ Order repairs after home inspection

\_\_\_\_\_ Request list of utility providers from seller and have seller set up for utilities turned off day of closing

\_\_\_\_\_ Receive keys to home or door code info and provide to buyer's agent

\_\_\_\_\_ Change in MLS to sold

\_\_\_\_\_ Load Fully Executed Settlement Statement in Skyslope

# Buyer Contract Checklist

Property Address \_\_\_\_\_ Buyer's Names \_\_\_\_\_

Buyer's Phone # \_\_\_\_\_ Buyer Email Addresses \_\_\_\_\_

Contract Close Date \_\_\_\_\_ Listing Agent Name \_\_\_\_\_

Listing Agent Phone Number \_\_\_\_\_ Title Company Contact Person \_\_\_\_\_

Title Company Phone Number \_\_\_\_\_

Date

Date

Completed

Task

Completed

Task

\_\_\_\_\_ Fully executed contract sent to buyer

\_\_\_\_\_ Closing gift purchased for buyers

\_\_\_\_\_ Fully executed contract to title agent

\_\_\_\_\_ Provide keys or door code to buyer

\_\_\_\_\_ Fully executed contract to lender

\_\_\_\_\_ Load Settlement Statement in Skyslope

\_\_\_\_\_ Fully executed contract in Skyslope

\_\_\_\_\_ Just Sold Postcards ordered and mailed out

\_\_\_\_\_ Home Inspection ordered

\_\_\_\_\_ Load in Boomtown with Monthly E Alert Comps

\_\_\_\_\_ WDO Ordered

\_\_\_\_\_ Set up on Past Client Drip Campaign

\_\_\_\_\_ Survey Ordered

\_\_\_\_\_ Request review & send link to Trulia/Realtor.com

\_\_\_\_\_ Condo Docs/HOA C&R to buyer

\_\_\_\_\_ Thank you note mailed to buyer

\_\_\_\_\_ EMD Receipt Sent to Selling Agent

\_\_\_\_\_

\_\_\_\_\_ EMD Receipt Loaded in Skyslope

\_\_\_\_\_

\_\_\_\_\_ Condo or Association Disclosure received from buyer's agent and signed by buyer

\_\_\_\_\_ Fully executed Condo/Association Disclosure loaded in Skyslope

\_\_\_\_\_ Insurance quotes received and sent to buyer

\_\_\_\_\_ Provide Introduction to Rental Management Companies

\_\_\_\_\_ Email buyer utility company contact info to have turned on day of closing

\_\_\_\_\_ Repairs requested after inspection

\_\_\_\_\_ Reinspection ordered after repairs completed

\_\_\_\_\_ Schedule walk through for buyer day before closing

# Checklist for Buyer After Sale

Property Address \_\_\_\_\_ Buyer's Names \_\_\_\_\_

Buyer's Phone # \_\_\_\_\_ Buyer Email Addresses \_\_\_\_\_

Contract Close Date \_\_\_\_\_ Listing Agent Name \_\_\_\_\_

Listing Agent Phone Number \_\_\_\_\_ Title Company Contact Person \_\_\_\_\_

Title Company Phone Number \_\_\_\_\_

Date

Completed      Task

\_\_\_\_\_ Email scheduled with HUD1 to go out Jan. 15

\_\_\_\_\_ Active, Pending, Sold Property DRIP Campaign for Neighborhood twice a month

\_\_\_\_\_ Set-up To-Do's in calendar for calls quarterly

\_\_\_\_\_ Set-up To-Do Unsolicited CMA annually

\_\_\_\_\_ Set-up on Homebot.ai

\_\_\_\_\_ Make sure responded to review request from Testimonial Tree