

★★★★★ 180 Step Sales & Marketing Plan For Success ★★★★★

1. Meet with homeowner(s) to determine financial goals, time frames, and successful outcomes.
2. Perform exterior “curb appeal assessment” of property.
3. Review meeting questions, follow-up with any deliverables and/or reports.
4. Research all comparable properties currently listed, pending, and sold.
5. Research sales activity, and average days on market (DOM) data, for the past 18 months
6. Research average “days on market” (DOM) for properties similar in type, price, and location.
7. Review property tax roll information.
8. Prepare comprehensive “comparable market analysis” (CMA) report to determine current market value.
9. Obtain copy of subdivision plat/complex layout.
10. Research property’s ownership and deed type.
11. Research property’s public record information for lot size and dimensions.
12. Verify legal description of property.
13. Research property’s land use coding and deed restrictions.
14. Research property’s current use and zoning.
15. Verify legal names of owner(s) in county’s public property records.
16. Compile and assemble formal file of property.
17. Confirm current public schools and explain their impact on market value.
18. Verify completion of all listing appointment tasks.
19. Prepare listing package with detailed documents and materials.
20. Provide seller an overview of current market conditions, projections, and estimated outcomes.
21. Review agent and company credentials and accomplishments.
22. Present company’s profile and position or “niche” in the marketplace.
23. Present CMA report including all comparables sold, active listings, pending listings, and expired listings.
24. Offer professional pricing strategy based on interpretation and analysis of current market conditions.
25. Discuss goals to dominate and blitz the market for maximum exposure.
26. Explain market power and benefits of the Multiple Listing Service (MLS).
27. Explain market power of online marketing, SEO, and retargeting.
28. Explain the power of a dedicated property website for branding and more online views.
29. Explain the work the broker/agent does “behind the scenes” and agent’s availability on weekends.
30. Explain agent’s role in screening qualified buyers to protect against wasted time with tire kickers.
31. Present and discuss strategic marketing plan and all premium services.

32. Explain agency relationships and answer any questions.
33. Review all sections of listing contract, answer questions, and begin achieving seller's successful outcome.
34. Provide seller with signed copies of Listing Agreement within 48 hours.
35. Order professional appraisal to be completed by licensed appraiser.
36. Order professional photography, including aerial/drone photography if desirable.
37. Order professional videography, including virtual tour if desirable.
38. Order professional 2D/3D floor plan creation for enhanced buyer visualization.
39. Order whole house inspection, including radon and termite inspections if warranted.
40. Review inspection results with seller and provide repair recommendations to avoid hurdles with buyer(s).
41. Review current title information.
42. Verify all property square footage with homeowner.
43. Verify interior room sizes.
44. Confirm lot size via owner's copy of certified survey, if available.
45. Note any and all unrecorded property liens, agreements, easements.
46. Obtain and review floor plans, if applicable and available.
47. Order plat map for retention in property's listing file, if needed.
48. Prepare showing instructions for buyers' agents and agree on showing time(s) with seller.
49. Obtain current mortgage loan(s) information: companies and account numbers.
50. Verify current loan information with lender(s).
51. Check assumability of loan(s) and any special requirements.
52. Discuss possible buyer financing alternatives and options with seller.
53. Identify Home Owner Association (HOA) manager and contact information, if applicable.
54. Verify Home Owner Association fees with manager—mandatory or optional, and current annual fee.
55. Order copy of Home Owner Association bylaws, if applicable.
56. Determine electricity supplier's name and phone number.
57. Calculate average electricity utility usage from last 12 months of bills.
58. Determine city sewer/septic tank system name and phone number.
59. Calculate average sewer utility usage from last 12 months of bills.
60. Determine water supplier's name and phone number.
61. Calculate average water system fees or rates from last 12 months of bills.
62. Confirm well status, depth, and output from Well Report (if applicable).
63. Determine natural gas availability along with supplier's name and phone number.

64. Calculate average gas utility usage from last 12 months of bills.
65. Verify security system, term of service, and whether owned or leased.
66. Determine applicable fees associated with security system monitoring, if applicable.
67. Verify if seller has transferable termite bond, home warranties, service warranties, etc.
68. Assist seller with completion of Seller's Disclosure form. (legal requirement when selling)
69. Ascertain need for lead-based paint disclosure (legal requirement when selling).
70. Acquire detailed list of property amenities and assess market impact – 80/20 rule for marketing.
71. Order professional copywriting for property description and branding.
72. Prepare detailed list of property "Inclusions & Conveyances with Sale."
73. Prepare detailed list of property "Exclusions from Sale."
74. Acquire list of completed repairs, upgrades, and maintenance items.
75. Discuss staging recommendations and options with seller if property is vacant.
76. Discuss benefits of holding an Open House.
77. Schedule Open House dates on calendar.
78. Explain benefits of Home Owner Warranty to seller.
79. Assist sellers with completion and submission of Home Owner Warranty application (optional).
80. When received, place Home Owner Warranty documents in property file for conveyance at time of sale.
81. Have extra key made for lockbox, if needed.
82. Install lockbox on property for showings.
83. Verify if property has rental units involved. If so:
84. Make copies of all leases for retention in listing file.
85. Verify all tenant information, rents, and deposits.
86. Inform tenants of listing and discuss how showings will be handled.
87. Install luxury yard sign and post, including Info box, in optimal viewing location.
88. Setup 1-800 number, texting information, and QR code for automated property information.
89. Design sign rider with all information above and attach to yard sign.
90. Register domain name to be used exclusively to access property information (www.123YourStreet.com).
91. Design website exclusively for highlighting property details and features.
92. Launch dedicated property website and test all videos, photos, forms, functionality, etc.
93. Complete "new listing checklist."
94. Review Curb Appeal Assessment with seller and suggest improvements for salability.
95. Review interior decorating suggestions with seller to shorten time on market.

96. Enter property data into MLS listing database, including all professional photos.
97. Proofread MLS database listing for accuracy, including property placement in mapping function.
98. Add property to company's Active Listings.
99. Design professional marketing fliers/brochure for property.
100. Arrange for continuous supply of marketing brochures and/or fliers for Info box and showings.
101. Launch online marketing ads, multiple platforms, and configure search engine optimization (SEO).
102. Launch online retargeting initiatives to keep property in front of those who showed interest.
103. Coordinate showings with seller, other agents, and tenants. Return all calls—weekends included.
104. Prepare mailing and potential buyers contact list.
105. Order and mail "Just Listed" postcards for all surrounding neighbors, minimum of 500 households.
106. Review comparable MLS listings regularly to ensure property remains competitive on market.
107. Syndicate listing to 100+ sites and services for maximum exposure.
108. Distribute price changes promptly to all interested parties and/or individuals.
109. Reprint/supply brochures and/or fliers promptly, as needed.
110. Review and update loan information in MLS, as required.
111. Solicit feedback from each buyer's agent after all showings.
112. Provide all showing feedback to seller promptly.
113. Discuss feedback from showing agents with seller to determine if changes will accelerate the sale.
114. Review weekly market data.
115. Regular communication with seller to discuss marketing strategy and pricing.
116. Promptly enter any price changes in MLS listings database and other applicable locations.
117. Receive and review all Purchase Agreement (offer) contracts submitted by buyers or buyers' agents.
118. Counsel seller on offers. Explain strengths and weaknesses of each offer.
119. Contact buyers' agents to review buyer's qualifications and discuss offer.
120. Deliver Seller's Disclosure to buyer's agent, or buyer, if necessary.
121. Confirm buyer is pre-qualified/pre-approved by calling loan officer.
122. Obtain pre-qualification/pre-approval letter for buyer from loan officer or buyer's agent.
123. Negotiate all offers on seller's behalf, setting time limit for loan approval and closing date.
124. Prepare and convey any counteroffers, acceptance, or amendments to buyer's agent.
125. When Offer-to-Purchase contract is accepted and signed by seller, deliver to buyer's agent.
126. Receive, record, and promptly deposit buyer's earnest money deposit into escrow account.
127. Send copies of purchase agreement and all addendums to closing attorney or title company.

128. Disseminate "Under-Contract Showing Restrictions," as seller requests.
129. Deliver copies of fully signed Purchase Agreement contract to sellers.
130. Deliver copies of fully signed Purchase Agreement contract to buyer's agent.
131. Deliver copies of fully signed Purchase Agreement contract to lender.
132. Provide copies of fully signed Purchase Agreement contract for office files.
133. Advise seller in handling of additional offers to purchase submitted between contract and closing.
134. Change MLS status to "Sale Pending" and update rider on yard sign.
135. Update all online listings with "Sale Pending" status.
136. Provide credit report information to seller if property is to be seller/owner financed.
137. Assist buyer with obtaining financing and follow up as necessary.
138. Confirm return of verifications of deposit and buyer's employment.
139. Follow loan processing through to the underwriter.
140. Contact lender weekly to ensure buyer's loan processing is on schedule.
141. Relay final approval of buyer's loan application to seller.
142. Explain seller's responsibilities of loan limits and interpret any clauses in the contract.
143. Coordinate buyer's home inspection with seller.
144. Review home inspector's report, along with any requested repairs by buyer.
145. Draft official inspection response on behalf of seller and submit to buyer's agent.
146. Ensure seller's compliance with home inspection clause requirements.
147. Assist seller with identifying and negotiating with trustworthy contractors for required repairs.
148. Negotiate payment and oversee completion of all required repairs on seller's behalf, if needed.
149. Verify and gather receipts for all completed repairs, provide to buyer's agent.
150. Coordinate buyer's property appraisal with seller.
151. Provide comparable sales data used in market pricing to appraiser, if necessary.
152. Follow-up on appraisal and assist with any seller questions.
153. Coordinate closing process with buyer's agent, title company, and lender.
154. Update closing forms and files.
155. Request copy of closing documents from closing agent.
156. Ensure all parties have all forms and information needed to close the sale.
157. Verify location for closing.
158. Coordinate closing with seller's next purchase, resolving timing issues.
159. Confirm closing date and time, notify all parties.

160. Solve any title problems (boundary disputes, easements, etc.) or assist with obtaining death certificates.
161. Work with buyer's agent in scheduling buyer's final property walkthrough prior to closing.
162. Research all property tax, HOA, utility, and other applicable prorations for closing.
163. Request final closing financial figures from closing agent (attorney or title company) for review.
164. Receive and carefully review closing financial figures to ensure accuracy.
165. Forward verified closing figures to buyer's agent, if needed.
166. Remove lockbox, yard sign, and brochures from property.
167. Attend closing with seller to assist with any questions or additional instructions.
168. Review documents with closing agent (attorney).
169. Review all closing documents carefully for errors.
170. Confirm the buyer and buyer's agent received title insurance commitment.
171. Verify buyer receives all property keys, garage door openers, utility information, etc.
172. Provide "Home Owners Warranty" documents at closing, if applicable.
173. Forward closing documents to absentee seller, if applicable.
174. Provide earnest money deposit from escrow account to closing agent.
175. Verify seller receives closing funds and settlement documents promptly after closing.
176. Change MLS status to Sold. Enter sale date, price, selling broker and agent's ID numbers, etc.
177. Deactivate all online marketing, property website, website domain, etc.
178. Answer questions about filing claims with Home Owner Warranty company, if requested.
179. Attempt to clarify and resolve any inspection repair conflicts if buyer is dissatisfied.
180. Respond to any follow-up calls and provide any additional information required from closing files.