

Many home sellers are not aware of the actual value a Realtor® provides them in the course of a real estate transaction. In fact, most consumers have simply never been made aware of the level of expertise, professional skill and plain old hard work that go into finalizing a real estate transaction successfully.

The list below will provide you with a general idea of the 150+ actions necessary for the completion of a successful real estate transaction. The list is not all-encompassing, nor is it an exclusive list of duties as these may vary based on the property, but it will provide you with a basic outline of the services you should expect from a full-service real estate brokerage firm in return for their professional fee. **NOTE:** Generally, a full-service brokerage receives no compensation whatsoever unless and until your sale closes.

**Pre-Listing Activities**

* 1. Consult with Seller via telephone regarding their goals, timeframe & circumstances for selling, and set

appointment for listing presentation.

* 2. Research all comparable properties - currently listed properties and recent sales activity - through the Multiple

Listing Service (MLS) and/or other public record databases and property valuation sites.

* 3. Research "Average Days on Market" for comparable properties (both active and closed sales).
* 4. Create and analyze “trend” reports to determine the current state of the local market and its projected direction.
* 5. Research and assess the impact of foreclosures in the given neighborhood.
* 6. Research and assess the impact of any nearby new construction.
* 7. Download and review property tax information.
* 8. Obtain copy of property deed(s) to verify property ownership and deed type.
* 9. Obtain copy of lot survey or subdivision plat/complex lay-out (if available).
* 10. Obtain copy of HOA guidelines/by-laws (if available).
* 11. Research property's public record information for lot size and dimensions.
* 12. Identify Buyer demographic most likely to purchase property
* 13. Prepare "Comparable Market Analysis" (CMA) based on information collected in previous steps to establish an

accurate market value range to assist the Seller in positioning the home to sell.

* + - * 1. Identify differences in each property and make price adjustments as needed
        2. Identify all advantages the subject price may have (finished basement, wooded backyard)
        3. Identify any challenges the subject price may have (power lines, steep driveway, etc…)

* 14. Prepare listing and/or pre-listing presentation package using above materials.
* 15 Perform a “curb appeal assessment” of the subject property and create a recommendation report.
* 16. Confirm current public schools and prepare to explain impact of schools on market value.
* 17. Compile and assemble a formal file on property.

**Listing Appointment Presentation**

* 18. Meet with Seller to provide an overview of current market conditions and trend projections.
* 19. Review Agent’s credentials and accomplishments in the marketplace and explain how this affects their sale.
* 20. Present Company's profile and position in the real estate industry and how corporate advertising and brand

recognition affects their sale.

* 21. Present CMA results to Seller, including comparables: recently sold properties, pending sales and active listings
* which are the Seller’s current competition on the market.
* 22. Discuss Sellers assessment of any noted advantage & challenges.
* 23. Discuss with Seller all property amenities and assess market impact.
* 24. Provide Seller with a positioning strategy based on the factors of: location, condition, timeframe, marketing and

price.

* 25. Discuss with Seller suggested methods to market the property effectively based on current market conditions.
* 26. Explain the importance of an effective online marketing strategy based on the current technology driven nature of

Buyers in today’s marketplace.

* 27. Explain use of Multiple Listing Service and the importance of the MLS Profile Sheet.
* 28. Explain the behind the scenes work done by the Agent and the Brokerage staff.
* 29. Discuss Agent’s availability to the Seller, all Buyers’ Agents and potential Buyers calling in directly.
* 30. Explain Agent's role in screening for qualified Buyers to protect Seller from curiosity seekers.
* 31. Present and discuss strategic master marketing plan in full, once Seller has hired Agent.
* 32. Review and explain all clauses in Listing Contract and Addendum and obtain Seller's signature.
* 33. Discuss, and note, Seller’s preferred contact method.

**Once Property is Under Listing Agreement**

* 34. Perform a “condition assessment” of the property and suggest changes to help minimize time on market.
* 35. Identify opportunities where Seller may benefit from neutralizing or depersonalizing specific areas of the home.

Make staging recommendation, if necessary.

* 36. Review results of “curb appeal assessment” with Seller and provide suggestions to improve selling potential.
* 37. Have Seller complete “Seller's Disclosure” and “Community Association Disclosure” forms.
* 38. Determine need for lead-based paint disclosure.
* 39. Complete any outstanding listing contract addendums, exhibits & disclosures and obtain Seller's signature.
* 40. Prepare detailed list of property's "Inclusions & Conveyances with Sale."
* 41. Confirm square footage of home via tax records or appraisal.
* 42. Prepare MLS Profile Sheet – Listing Agent is responsible for quality control and accuracy of listing data.
* 43. Explain benefits of Home Owner Warranty to seller.
* 44. Assist Seller with completion and submission of Home Owner Warranty Application, if desired.
* 45. Confirm that Seller has an active, transferable termite bond on the property.
* 46. Initiate “Coming Soon” marketing blast.
* 47. **Complete "New Listing Checklist”:**
* 48. - Order Professional photography for use in MLS, property brochures and virtual tour.
* 49. - Load listing data into company transaction management software program to ensure proper tracking.
* 50. - Write an attention grabbing property description for inclusion in MLS, property brochures and other marketing

collaterals.

* 51. - Have staff member enter property data from Profile Sheet into MLS Listing Databases (FMLS & GaMLS).
* 52. - Upload property photos into MLS Listing Databases (FMLS & GaMLS).
* 53. - Proofread MLS database listing for accuracy and enter descriptive caption for photos of each room.
* 54. - Load listing data into lockbox software program to allow monitored access to property.
* 55. - Have extra key made for lockbox.
* 56. - Arrange for installation of yard sign(s) and lockbox.
* 57. - Verify if security system is active and note how it operates.
* 58. - Prepare showing instructions for Buyers' Agents and agree on showing times/availability with Seller.
* 59. - Load listing data into (ShowingSuite) Buyer feedback software to provide Seller with feedback.
* 60. - Load photos and listing data into (TourFactory) software to create virtual tour.
* 61. - Create and upload 3 property specific webpages for use on Barton Team websites.
* 62. - Design and order full-color property marketing brochures.
* 63. - Create and print “in-home” marketing materials (home book, special feature cards, etc…)
* 64. - Share listing data on social media (Facebook, Twitter, Linked-in, Google+)
* 65. - Create “New Listing” e-blast to email out to top local Buyers’ Agents.
* 66. – Update listings on Zillow, Realtor.com, Trulia and the BHHS website to “enhance” by adding additional photos,

videos supporting documents and custom banners.

* 66. - Write and share new listing blog to generate SEO.
* 67. - Request that Seller order copy of Homeowner Association bylaws and/or protective covenants, if applicable.
* 68. - Request utility service information from Seller (supplier's name and telephone number).
* 69. - Compile list of all completed repairs, updates and maintenance items.
* 70. - Obtain house plans/floor plan from Seller and copy for property's listing file, if applicable and available.
* 71. - Order plat map for retention in property's listing file.
* 72. - Set up open house date in multiple software programs to push out to internet.
* 73. - Create “Open House” e-blast to send out to top local Buyers’ Agents prior to event.
* 74. - When received, place Home Owner Warranty in property file for conveyance at time of sale.
* 75. - Provide Seller with copy of all signed documents and marketing materials.
* 76. If property is vacant, send "Vacancy Checklist" to Seller.
* 77. Verify if any portion of the property involves rental units. If so,
* 78. - Make copies of all leases for retention in listing file.
* 79. - Verify all rents and deposits.
* 80. - Inform tenants of listing and discuss how showings will be handled.
* 81. Refer Sellers to a Realtor® at their new destination, if applicable.

**Ongoing Listing Support**

* 82. Coordinate showings with owners, tenants, and other Realtors®. Return all calls - weekends included.
* 83 Create open house specific marketing materials and flyers.
* 84. Hold Open House as soon as reasonably possible.
* 85. Review comparable MLS listings regularly to ensure property remains competitive in price, terms, conditions and

availability.

* 86. Review trending databases (Trendgraphix, RealValuator, etc..) regularly to monitor movement within the market.
* 87. Follow up on feedback from Buyers' Agents as needed.
* 88. Discuss feedback from Showing Agents with Seller to determine if changes will accelerate the sale.
* 89. Place regular weekly update calls to Seller to discuss marketing and pricing.
* 90. Reprint/supply brochures promptly, as needed.
* 91. Promptly enter price and status changes in MLS listing database.
* 92. Price changes conveyed promptly to all Internet sites.

**Managing the Offer and Contract**

* 93. Receive and review all Offer to Purchase contracts submitted by Buyers or Buyers' Agents.
* 94. Evaluate offer(s) and prepare to assist the Seller with comparisons.
* 95. Counsel Seller on offers. Explain benefits and limitations of each offer.
* 96. Review negotiating strategies with Seller.
* 97. Contact Buyers' Agents to review Buyer's qualifications and discuss offer.
* 98. Negotiate all offers on Seller's behalf, setting time limits for due diligence, loan approval and closing date.
* 99. Prepare and convey any counter offers, acceptance or amendments to Buyer's Agent.
* 100. When Offer to Purchase Contract is fully accepted and signed by Seller, deliver copies to Buyer's Agent.
* 101. Confirm Buyer is pre-qualified/pre-approved by speaking with Loan Officer.
* 102. Obtain pre-qualification letter on Buyer from Loan Officer.
* 104 Provide copies of contract and all addendums to Closing Attorney.
* 105. Record and promptly deposit Buyer's earnest money in escrow account if held by BHHS.
* 106. Provide copies of Offer to Purchase contract to Lender.
* 107. Upload copies of signed Offer to Purchase into company transaction management software program to ensure proper tracking.
* 108. Update MLS and transaction management program to show property is under contract and update showing status.
* 109. Verify home inspection date and coordinate with Seller.
* 110. Advise Seller in handling additional offers to purchase submitted between contract and closing.

**Tracking the Loan Process**

* 111. Request copy and verify deposit of earnest money, if not held by BHHS.
* 112. Follow-up with Lender on a weekly basis. Assist Buyer with obtaining financing, if applicable.
* 113. Track loan processing through each step until final underwriter is complete.
* 114. Relay final approval of Buyer's loan application (clear to close) to Seller.

**Home Inspection**

* 115. Ensure Seller's understanding of and compliance with Home Inspection Clause requirements.
* 116. Coordinate Buyer's professional home inspection with Seller and coordinate access to property, if applicable.
* 117. Verify mold, termite, radon or any other applicable inspections have been ordered if required by contract.
* 118. Ensure Seller's compliance with Home Inspection Clause requirements.
* 119. Review Home Inspector's report and Buyer’s request for repairs with Seller.
* 120. Discuss any required septic system, well flow, etc... report with Seller to assess any possible impact on sale.
* 121. Deliver any required inspection report to Lender and Buyer’s Agent.
* 122. Enter completion of each task into transaction management tracking software program to ensure proper tracking.
* 123. Assist Seller with identifying trustworthy contractors to perform any repairs.
* 124. Verify completion of all required repairs on Seller's behalf, if needed.

**The Appraisal**

* 125. Coordinate appraisal date with Seller and coordinate access to property, if applicable.
* 126. Provide comparable sales data and information about the property and updates/upgrades to Appraiser.
* 127. Follow-Up on appraisal.
* 128. Enter completion into transaction management program to ensure proper tracking.
* 129. Assist in questioning/rebutting the appraisal report, if the need arises.

**Closing Preparations and Duties**

* 130. Coordinate closing process with Buyer's Agent, Lender and Closing Attorney.
* 131. Update closing forms and files.
* 132. Provide Home Owners Warranty confirmation to Closing Attorney’s office if required by contract.
* 133. Ensure all parties have all forms and information needed to close the sale.
* 134. Confirm closing date, locations and time and notify all parties.
* 135. Notify Seller of items they must bring to closing (driver’s license, etc..)
* 136. Assist in solving any title problems (boundary disputes, easements, etc), if applicable.
* 137. Work with Buyer's Agent in scheduling and conducting Buyer's final walk-through prior to closing.
* 138. Request final closing figures from Closing Attorney.
* 139. Confirm that Buyer has received loan commitment “clear to close” at least 3 days prior to scheduled closing.
* 140. Verified that Buyer’s Agent has reviewed closing figures and provided to Buyer for review.
* 141. Carefully review Seller’s closing figures to ensure accuracy of preparation.
* 142. Review documents with Closing Attorney if errors are found.
* 143. Provide earnest money deposit check from escrow account to Closing Attorney, if held by BHHS.
* 144. Coordinate this closing with Seller's next purchase and resolve any timing problems.
* 145. Remind Seller to bring house keys, garage door openers, pool passes etc. to closing
* 146. Finalize transaction with a "no surprises" closing.
* 147. Change MLS status to Sold. Enter sale date, price, concessions, Selling Broker and Agent's ID numbers, etc.
* 148. Close out listing in transaction management program.

**After Closing Duties**

* 149. Coordinate removal of lockbox and signage.
* 150. Answer any questions and/or resolve any remaining post-closing issues.
* 151. Respond to all follow-up calls and provide any requested information to clients.
* 152. Include Seller in all client appreciation events and drawings.