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**Real Estate Practice Outline A close up of a logo

Description automatically generated**

**New to the Business Licensees**

**(YOUR COMPANY LOGO HERE)**

**Company Mission for Agents**

**(INSERT YOUR COMPANY OR PERSONAL MISSION STATEMENT)**

### **Company Vision for Agents**

**(INSERT YOUR COMPANY OR PERSONAL VISION STATEMENT)**

**Values**

**(INSERT YOUR COMPANY OR PERSONAL VALUES – EXAMPLES BELOW)**

**E**xcellence - In all we do

**I**ntegrity - Above all

**G**oal Oriented - Getting the job done

**A**ttitude - Always positive

**N**otable – Results

**D**edicated - To being the best

**Real Estate Practice Outline - A Checklist for Starting Up and Standing Out**

By: Karel Murray, DREI Emeritus

Contributing Editor: Lisa Betts, M.A.

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Although the author has tried to be inclusive and has researched all sources in order to provide an accurate and complete product, no responsibility is made for errors, inaccuracies, omissions, or any inconsistencies herein. If certain products or services have been omitted, it is unintentional.

As with all sample forms and outlines, product purchasers should consult with their broker, manager, company owner, attorney, accountant, or other competent professional before using the forms provided in this product for specific applications to their individual business or tax situations.

The process outlined in this product is provided as a starting place and is not necessarily designed to be used verbatim.

Comments or Suggestions regarding

the Real Estate Practice Outline?

We welcome your input! Please send your suggestions to **(your email)**

*Thank You!*

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**(YOUR COMPANY LOGO HERE)**

# **Leadership**

# (LIST NAMES AND TITLES AS APPLICABLE)

**Branch Locations and Contact Information**

# (LIST NAMES AND TITLES AS APPLICABLE – INCLUDE ADDRESSES, TELEPHONE NUMBERS AND EMAIL ADDRESSES)

**(YOUR COMPANY LOGO HERE)**

# **Welcome to (YOUR COMPANY NAME) and the Real Estate Practice Outline!** Congratulations on making the commitment to organizing your progress toward success. The purpose of Real Estate Practice Outline is simple: to provide you (the “new hire”) and your Broker Manager with an easy-to-follow set of guidelines and check-off tasks that will help you to understand **(YOUR COMPANY NAME)**, your role as a real estate Licensee, and your real estate business. It’s a program designed to help you establish a real estate career that is both profitable and long term.

**New Licensee Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Broker/Mentor Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**How to Make the Most of Your Real Estate Practice Outline:**

* You should be collaborating with your Designated Broker to complete your Real Estate Practice Outline ; begin by committing to meeting dates for the Schedule above.
* Do the exercise on the next page and read pages 3-6 closely. The expectations and goals outlined on pages 3-6 are central to what Real Estate Practice Outlinewill be helping you to meet and achieve.
* The supporting tasks of those expectations and goals are organized by timeline.
* Note: This template offers ideas and guidance useful for up to the first 6 months in business.

**A Self-Assessment**

## **Step #1: How Do You Measure Up?**

### 

### Ability to Think Outside the Box & Dream Big Excellent Very Good Good Fair Poor

### Competency with Forms, Paperwork, etc.Excellent Very Good Good Fair Poor

### Communication Skills Excellent Very Good Good Fair Poor

Dedication to Customer Service Excellent Very Good Good Fair Poor

Financial Responsibility Excellent Very Good Good Fair Poor

Accountability & Follow up Excellent Very Good Good Fair Poor

Negotiating Abilities Excellent Very Good Good Fair Poor

Professional Demeanor and Attitude Excellent Very Good Good Fair Poor

Progressive Use of Technology Excellent Very Good Good Fair Poor

Time Management and Organizational Skills Excellent Very Good Good Fair Poor

Self-Discipline Excellent Very Good Good Fair Poor

Positive, Pleasant Assertiveness Excellent Very Good Good Fair Poor

People Skills (makes conversation, enjoys others, etc.) Excellent Very Good Good Fair Poor

Ethical Decision Making & Follow-Through Excellent Very Good Good Fair Poor

Communication with Superiors Excellent Very Good Good Fair Poor

## **Step #2: Your Self-Assessment Results**

From Self-Assessment above, list your two greatest strengths:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

From Self-Assessment above, list two areas that require improvement:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Step #3: As You Complete Real Estate Practices Outline**. . .

* Keep in mind how the above listed strengths can best serve you.
* Set aside extra time and energy to accomplish tasks involving your weak areas; however, expect more efficiency in your areas of strength.
* Consider sharing your Assessment results with your Broker; he or she may have insight and advice on how best to overcome your weaknesses and capitalize on your strengths!

## Rookie_blueprint**Meeting Expectations:**

## **Recommendations for Time Management**

🗹 **Spend 65% of Real Estate Time on Income Producing Activities:**

#### Prospecting/Farming List/Sell properties Network Show homes Do mailings Write offers

#### Make phone calls Negotiate contracts Hold open houses Process paperwork Qualify buyers Communicate

Do market analysis Go to closings Conduct follow-ups

🗹 **Spend 35% of Real Estate Time on Maintenance Activities:**

Advertise Board activities Attend meetings

Personal time Counseling Record keeping

Education Use computer Maintain car

**Performance Standards**

## ***Suggested Levels for Maximum Benefit in Building a Real Estate Career***

**Minimum Performance Standards – New Licensee (0-1 year)**

* Advertise two listings per month (may be another Associate’s listing)
* Close 4 transactions (or sides) a year
* Hold 2 open houses a month (may be another Associate’s listing)
* Master the creation of a market analysis and the pricing of property
* Establish a personal promotion program by creating and maintaining a potential

customer / client data base by either a geographic or people farm program

* Participate in office activities and meetings

**Minimum Performance Standards – Growth Licensee (1-3 years)**

* Close a minimum production of 2 Million with an 80% expiration ratio
* Expand a personal promotion program by creating and maintaining a potential

customer / client data base by either a geographic or people farm program

* Participate in office activities and meetings

**Minimum Performance Standards – Mature Licensee (3+ years)**

* Close a minimum production of 3+ Million with a 90% expiration ratio
* Participate in office activities and meetings
* Encourage research and starting retirement planning for future financial security

**An Overview of Objectives by Topic**

* **How We Work and Expectations Within (YOUR COMPANY NAME)**

###### Regularly communicate issues of concern or importance to your Broker

* + Learn about your company by attending sales meetings & training sessions
  + Become proficient in the use of the company equipment
  + Comply with office policy & procedures
* **Know (YOUR COMPANY NAME)**
  + Know about your company’s offerings and understand its procedures.
  + Educate yourself regarding the company’s available software, internet applications, & internet activities
  + Review & select appropriate company merchandise & advertising material
* **Setting Up & Running Your Business** 
  + Set up & attend to the efficient, professional running of a business
  + Identify the professional resources essential to building your business
  + Master tools to assist you in securing buying and selling prospects
  + Become familiar with the MLS & cooperative activity with other Business Partners
* **Business Plan & Strategic Prospecting** 
  + Set goals for yourself
  + Prepare your budget
  + Establish sources of prospects that will yield both short & long term results
  + Find & develop a prospecting niche or system that works for you
  + Develop a geographic or people farm, then design a stage-by-stage program for personal promotion – Be an expert in your own neighborhood
  + Master the procedures to obtain, send, & follow-up on a referral
  + Identify excellent service providers & vendors
  + Become opportunistic: learn how to capitalize opportunity into business
  + Develop a dialogue for making contacts that will lead to qualified prospects
* **Personal Marketing (Branding Your Business)** 
  + Put the scope & content of an effective marketing plan into action
  + Set up a method to keep in contact with past clients
  + Design & incorporate the company brand to align with your business principals & objectives
* **Listing Practices** 
  + Know what level of quality & amenities to expect in various housing price ranges
  + Understand how a property is appraised & how it is priced
  + Know the disclosure requirements mandated by law & good practice
  + Master the use of a “Listing Interview”
  + Master contract, forms, & disclosure document completion
  + Incorporate statements that highlight the benefit of working with you into your commission negotiations.
  + Design & master the concepts & principles of an effective, pro-active Seller marketing system
  + Be prepared for the typical challenges that Sellers present in listing situations
  + Use effective negotiating techniques
  + Establish an open house routine that provides maximum benefit to the Seller as well as effectively introduces the property to the public
  + Create a social media presence
  + Enhance the Seller’s advantage by staging (preparing) a property for show
  + For maximum benefit to the Seller, establish a routine offer presentation format
* **Buying Practices** 
  + Master the completing of the contracts, forms, and disclosure documents vital to an offer’s creation
  + Master the use of a “Buyer’s Needs Analysis”
  + Remain informed & current on financing options available to Buyers
  + Refer Buyers to competent lending experts for financing options
  + Convert Buyers to Sellers through service, value & a contact regimen
  + Remain familiar with current the MLS inventory & activity
  + Develop a thoughtful & astute method for selecting & showing property
  + Know the primary buying motives of Buyers
  + Recognize the common buying signals of Buyers.
  + Establish tools, techniques, & dialogue to help Buyers make decisions
  + Prepare for the typical challenges Buyers present in the buying process
  + Understand the home inspection process
  + Write a winning offer & successfully handle negotiations
* **Career Competency & Professionalism** 
  + Learn about insurance issues related to the home buying process
  + Learn about the title process
  + Know how to renew your license
  + Be familiar with state-specific real estate rules & regulations
  + Review the agency options permitted by your state & company
  + Establish & maintain ethical business practices
  + Implement business routines that reflect a conscious concern for personal safety
  + Understand the opportunities and requirements for education in your area
  + Stay informed on current issues & trends in the real estate industry
  + Begin earning a real estate designation that ties directly into the type of business you wish to create

***Real Estate Practice Outline******Meeting Expectations***

Timeline Tasks: Week 1 & 2:



The following tasks are suggested for Week 1 & 2. Modify the tasks as necessary to fit your unique situation. At the end of the week, incomplete items may be carried over to a future Timeline by copying them into the blanks provided.

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Complete License Application Form

\_\_\_\_\_\_\_\_\_\_ When license arrives at branch office

* Call to schedule meeting to pay fees

\_\_\_\_\_\_\_\_\_\_ Complete (YOUR COMPANY NAME) paperwork with Office Coordinator/Broker

* Receive photocopier code
* Receive email address and password
* Receive inner office website user name and password

\_\_\_\_\_\_\_\_\_\_ Establish a meeting schedule with your Broker/Coordinator:

* Obtain access instructions to enter your (YOUR COMPANY NAME) office building
* Receive temporary business cards
* Order name badge (optional)
* What should be communicated
* How should it be communicated

\_\_\_\_\_\_\_\_\_\_ Have photos taken for personal promotion

* Shoot several action shots:
  + - Sitting – Talking - Pointing
  + Keep photos current: incorporate new looks and styles
  + Have your photos taken digitally so that a graphic artist may remove the background for use in all marketing media
  + Remove the background for use with other graphics

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Update calendar preferences to reflect (YOUR COMPANY NAME) event

calendar:

* Training schedules / Pro-Start / Sell & Excel
* Sales Meetings
* Marketing deadlines
* (YOUR COMPANY NAME) events (CE classes &/or Coaching)

\_\_\_\_\_\_\_\_\_\_ Review (YOUR COMPANY NAME) business card template

* After Broker approval, place your order through The Personal Marketing Company ([www.personalmarketingco.com)](http://www.personalmarketingco.com))
* Licensee pays for business cards and company will reimburse an amount not to exceed $45.00

\_\_\_\_\_\_\_\_\_\_ Review and attend office training sessions as established through (YOUR COMPANY NAME) Events Calendar

\_\_\_\_\_\_\_\_\_\_ Attend at least two (2) Broker’s / Open House events when available

\_\_\_\_\_\_\_\_\_\_ Meet your office staff

\_\_\_\_\_\_\_\_\_\_ Gain access to Paperless Pipeline

\_\_\_\_\_\_\_\_\_\_ Review web site and listings at (YOUR COMPANY WEBSITE)

\_\_\_\_\_\_\_\_\_\_ Review (YOUR COMPANY NAME)policy and procedure manual. Note

and get comfortable with the following:

* Company bill paying procedures
* Requirements for turning in contracts
* File audit / compliance procedures
* The fee, commission, or compensation policy
* Antitrust policies
* Fair Housing
* Personal sales commission policy
* Specific Company disclosures or routines

\_\_\_\_\_\_\_\_\_\_ Update your automobile insurance and send verification to Staff Director as outlined in the Policy Manual. Review insurance coverage regarding business use and your protection as it relates to your insurance.

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Establish your individual timeline for training on use of equipment, software, marketing materials, policy and procedures, company expectations and opportunities

\_\_\_\_\_\_\_\_\_\_ Once your real estate licensee is issued (5-7 days after background

check) and you have your license number, join the Association of

REALTORS (if you wish)

* Address:
* Phone:
* Complete on-line ethics training
* Schedule and attend orientation which includes MLS rules & regulations
* Schedule and attend MLS training 1 & 2

\_\_\_\_\_\_\_\_\_\_ Meet with marketing and/or social media specialist in your office to

review company programs and affiliate offerings. For example:

* Approved Vendor list
* Signage requirements
* Logo or advertising templates
* Pre-designed brochures and marketing materials
* Prepare press release with assistance of marketing personnel
* Login to Facebook® and “like” (YOUR COMPANY NAME) Agents and Office” pages
* Create business page on Facebook® and obtain Broker approval prior to publishing
* Create/update LinkedIn® and other social media profiles

**Broker Sign Off**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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***Real Estate Practice Outline******Meeting Expectations***

Timeline Tasks: Week 3:



The following tasks are suggested for Week 3. Modify the tasks as necessary to fit your unique situation. At the end of the week, incomplete items may be carried over to a future Timeline by copying them into the blanks provided.

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Get to know your product:

* Preview 5 homes in each of the price ranges listed below (as allowed).
* Review with your Broker the level of construction quality you should expect in each.

$ 0 - $ 99,999

$ 100,000 – $ 250,000

$ 251,000 – $ 500,000

$ 501,000 – $ 750,000

$ 751,000 +

\_\_\_\_\_\_\_\_\_\_ Attend 3-4 open houses hosted by experienced Sales Associates and

observe the following:

* How visitors are greeted
* The types of material available for visitors
* The types of comments visitors make
* The accuracy of the price relative to the property’s value
* Buying signs from visitors-if any

\_\_\_\_\_\_\_\_\_\_ With the assistance of the assigned Marketing Specialist, design an

announcement letter or postcard to advise your farm and sphere of

influence that you are in the real estate business*. Make it stand out: be*

*creative!*

* Use company sources to locate announcement postcards or flyers that you can modify
* Consider designing an announcement for placement in the newspaper or other local publications after evaluating financial investment in placing the advertisement

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Attend Association of REALTORS® Orientation (if applicable)

\_\_\_\_\_\_\_\_\_\_ Discuss with Broker Floor Duty scheduling and benefits of

volunteering for a slot to cover incoming phone leads

\_\_\_\_\_\_\_\_\_\_ Discuss opportunities for outbound/inbound referrals through Leading

Real Estate Companies of the World network

* Review assignment criteria and eligibility requirements

\_\_\_\_\_\_\_\_\_\_ Discuss opportunities for E Leads / Relocation

* Review assignment criteria and eligibility requirements

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Broker Sign Off**

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***Real Estate Practice Outline******Meeting Expectations***

Timeline Tasks: Week 4:



The following tasks are suggested for Week 4. Modify the tasks as necessary to fit your unique situation. At the end of the week, incomplete items may be carried over to a future Timeline by copying them into the blanks provided.

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Connect with Broker to create education/post licensing goals which would

include:

* Review / attend Pro Start for skill building
* Review / attend Sell and Excel (Webinar and/or live training)
* Attend (YOUR COMPANY WEBSITE) public and agent site training
* Utilize Contact Management Systems including (YOUR COMPANY WEBSITE)
* Set up a goal sheet and align with activities that will advance their results to the established goals
* Informal coaching session to review current market and prospecting realities and options.

\_\_\_\_\_\_\_\_\_\_ Create a preliminary business plan with the assistance of your Broker. You

will be revisiting this plan later.

* Review company planning worksheets and select what works best for you

\_\_\_\_\_\_\_\_\_\_ Prepare a preliminary business budget. Revisit it later.

\_\_\_\_\_\_\_\_\_\_ Also consider tracking expenses through a real estate contact management

or accounting software.

\_\_\_\_\_\_\_\_\_\_ Review office advertising campaigns and policies. Discuss with your Broker the level of personal promotion you are encouraged to do.

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Begin now developing a daily habit of checking and remaining familiar with

the MLS inventory.

\_\_\_\_\_\_\_\_\_\_ Gather information regarding the costs of doing a personal marketing

campaign that includes:

* Brochure distribution
* Sign development with approved Company sign options and approved by Broker
* Local publication options

\_\_\_\_\_\_\_\_\_\_ Purchase as Needed:

The list provided below is only a representative example of the types of

equipment that may be required. You are encouraged to explore and select

equipment that best suits your needs. Supports Android, Apple, Microsoft®

Windows*.*

\_\_\_\_\_ Brochures: Company & Personal

\_\_\_\_\_ Business Cards (personal design cards)

\_\_\_\_\_ Company related Buyer marketing materials

\_\_\_\_\_ Company related listing marketing materials

\_\_\_\_\_ Calculator App for smart phone or mortgage calculator

\_\_\_\_\_ Calendar: on-line scheduler or day planner

\_\_\_\_\_ Camera: explore office options for photo and video creation

\_\_\_\_\_ Cell phone i.e. smart phone with e-mail capability

\_\_\_\_\_ Flyer sign boxes (optional)

\_\_\_\_\_ Office supplies (explore company availability)

\_\_\_\_\_ PC Tablet (optional)

\_\_\_\_\_ Personal promotion items (pens, magnets, etc.)

\_\_\_\_\_ Real estate signs:

* Company provides general company yard signs and open directional signs.
* Personalized as approved by Broker

\_\_\_\_\_ Sign riders:

* Company offers: Open House and Sold
* Personalize as approved by Broker

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Work with in-house support staff to review / update your social media

accounts applicable to building your business and begin populating your

“friend” lists.

* Establish regular routine for updating and interfacing on the different social networking sites
* Gain a full sense of how you wish to use social media to build a community presence
* Adhere to company policy and procedures regarding use of social media in marketing efforts

\_\_\_\_\_\_\_\_\_\_ Complete 5 mock competitive market analyses (CMAs):

* Review basic principles of proper pricing with your Broker
* Locate 5 properties that meet the following criteria:
  + - Have closed in the last 3 months
    - Have the same total main floor square footage (within 100 sq feet)
    - Are located in approximately the same vicinity of the subject property
    - Have the same style as the home you are preparing a CMA for

\_\_\_\_\_\_\_\_\_\_ Review listing paperwork and required disclosures:

* Read the real estate listing contracts and subsequent disclosures.
* Be prepared to paraphrase contract sections easily and clearly to Sellers.
* Ask your Broker about any sections you do not understand.

\_\_\_\_\_\_\_\_\_\_ Complete 5 “Listing Interview” (located in Appendix) by interviewing friends

and family members.

\_\_\_\_\_\_\_\_\_\_ Complete 5 mock listing agreements, disclosures, accompanying

addendums, and required company paperwork.

\_\_\_\_\_\_\_\_\_\_ Complete 2 mock MLS data entry forms. Observe the data entry of listing information into the system. Become comfortable with the MLS data entry process so that you are prepared to enter in your first listings. Be sure to contact your Broker and/or training coordinator to ensure entry was done correctly. Audits will be completed by Broker on an established schedule.

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Prepare and practice your responses to the various types of challenges and

objections Sellers present:

* Interview Associates about typical Seller objections during listing presentations.
* Interview Associates about typical Seller listing problems.
* Note how Associates handle these issues and the dialogues they use with Sellers.

\_\_\_\_\_\_\_\_\_\_ Review property purchase agreements and required disclosures:

* Read the real estate sales contracts and subsequent disclosures.
* Be prepared to paraphrase contract paragraphs easily and clearly.
* Ask your Broker to explain sections you do not understand.

\_\_\_\_\_\_\_\_\_\_ Attend 2 contract completion sessions with an experienced Sales Associate.

\_\_\_\_\_\_\_\_\_\_ Attend 2 offer presentations by experienced Sales Associates (if available) and note the following:

* If the offer was presented by the Buyer’s Agent with the Seller present
* The process used by the Listing Agent to present the offer
* How a multiple offer situation is handled
* If counter offers were handled in writing or verbally
* The method of counter offer: scratch-and-initial or use of a counter offer form?
* What type of negotiation skills would enhance a successful negotiation encounter?

\_\_\_\_\_\_\_\_\_\_ Complete 5 mock property purchase agreements, disclosures,

accompanying addendums, and required company paperwork using the

following methods of financing:

* Cash
* Conventional financing
* FHA
* Return credit for closing cost and prepaids
* Purchase contingent on the sale of current property

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Review potential contingency statements that have been approved by your

Broker to avoid the unauthorized practice of law.

\_\_\_\_\_\_\_\_\_\_ Obtain from staff at least 5 Sales Forms Packets or access Paperless Pipeline to review and/or download applicable forms:

* Include all of the essential listing contracts and disclosures.
* This will enable you to quickly prepare for a Buyer offer session by having what you need right at your fingertips.

\_\_\_\_\_\_\_\_\_\_ Attend 2 listing presentations with an experienced Sales Associate (as

available) and note:

* What the Associate does to make the Seller feel at ease
* How issues related to the condition of the property are discussed with the Seller
* How you would best present pricing to the Seller
* How rooms are measured
* The overall condition of the property and how it relates to accurate pricing

\_\_\_\_\_\_\_\_\_\_ Review (YOUR COMPANY NAME) Compliance Checklist for Buyer / Seller documents

**Broker Sign Off**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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***Real Estate Practice Outline******Meeting Expectations***

Timeline Tasks: Week 5:



The following tasks are suggested for Week 5. Modify the tasks as necessary to fit your unique situation. At the end of the week, incomplete items may be carried over to a future Timeline by copying them into the blanks provided.

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Familiarize yourself with computer software as needed:

*The options provided in the list below represent only a sample of the types*

*of software available on the market.*

* + - * ***Refer to Resources List Provided on Weigand Intranet***

\_\_\_\_\_ Accounting software

\_\_\_\_\_ Adobe Acrobat™ Professional – Most recent update

\_\_\_\_\_ Contact management software

* (YOUR COMPANY WEBSITE)

\_\_\_\_\_ Data management software

\_\_\_\_\_ Document Signing

\_\_\_\_\_ Drones

\_\_\_\_\_ Flyer creation software

\_\_\_\_\_ Word processing software

\_\_\_\_\_ Virtual Tours

\_\_\_\_\_\_\_\_\_\_ Purchase computer software as needed:

*The options provided in the list below represent only a sample of the types*

*of software available on the market.*

\_\_\_\_\_ E-Mail software

\_\_\_\_\_ Presentation software

\_\_\_\_\_ Security software

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Develop and practice aloud a script for how you will:

* Explain to potential customers what you do for a living and why your service is valuable
* Ask for their contact information
* Ask for their business and referrals
* Answer typical questions such as:
  + - “What do you specialize in?”
    - “Why did you go into real estate?”
    - “What is my house worth?”
    - “How is the housing market?”

\_\_\_\_\_\_\_\_\_\_ Create your own Unique Selling Proposition (within your company policy).

For help in accomplishing this, try the following:

* Create a job description to list the tasks and services in what a licensee does for a Seller and/or Buyer
* List 5 reasons how clients will benefit working with you.
* List 5 major selling points regarding (YOUR COMPANY NAME)

\_\_\_\_\_\_\_\_\_\_ Visit with (YOUR COMPANY NAME) staff personnel who files property

advertising and review the advertising process, costs, and timing of

submissions.

\_\_\_\_\_\_\_\_\_\_ Obtain the generic listing presentation outlining points regarding your

services to a Seller and customize with the assistance of the Marketing

Associate.

\_\_\_\_\_\_\_\_\_\_ Review your (YOUR COMPANY NAME) referral system and the related

offices procedures necessary to pay out on referral fees

\_\_\_\_\_\_\_\_\_\_ Design your personal one sheet or brochure.

* Prepare PDF and print option
* Consider contacting businesses that specialize in real estate personal promotion:
  + - [www.SharperCards.com](http://www.SharperCards.com)
    - [www.sharperagent.com](http://www.sharperagent.com)
    - www.sendsations.com
    - [www.thelonesgroup.com](http://www.thelonesgroup.com)
    - www.tpmco.com

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Create a marketing process/system template that addresses the following:

* Who would be interested in the property
* Individual Property Website through [(YOUR COMPANY WEBSITE)](http://www.Weigand.com)
* The property’s top selling points
* The property’s weaknesses
* Where the property would be best advertised
* Why a Buyer should be interested in this property
* The costs associated with various media
* The type of “Just Listed” notice to use
* The number and duration of open houses to have
* How the property will be highlighted on-line
* If a virtual tour is cost effective
* The magazines or other media that will work best for marketing the property
* What the Seller can do to assist in marketing

\_\_\_\_\_\_\_\_\_\_ Interview your Broker and other Sales Associates to develop a profile of

typical home buyers’ needs and priorities.

\_\_\_\_\_\_\_\_\_\_ Prepare at least 5 Listing Forms Packets or save templates in

Paperless Pipeline:

* Include all of the essential listings contracts and disclosure forms.

This will enable you to quickly prepare for a listing presentation by having what you need right at your fingertips.

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Create a Listing Presentation digital or a physical presentation format. This becomes your guide through the listing presentation:

* Much of what is in this presentation remains constant except for the inclusion of a property specific market analysis and recent MLS market data sheets.
* A Listing Presentation typically includes but is not limited to:
* Your mission statement
* (YOUR COMPANY NAME) mission statement
* Your personal brochure or flyer
* (YOUR COMPANY NAME) brochure or flyer
* Biography and benefit statements
* Designations you may have earned
* An MLS market data sheet
* Copies of your property marketing flyers
* Examples of past magazine ads
* A competitive market analysis
* A printout of a REALTOR.com property site (If applicable)
* A printout of (YOUR COMPANY NAME) web site
* A printout of your personal web site
* Testimonials on your performance
* Graphs/charts on Buyer performance or expectations
* What comprises your commissions
* (YOUR COMPANY NAME) and personal statistics
* List of all websites that we syndicate with

\_\_\_\_\_\_\_\_\_\_ Customize and save letter templates located in your contact management

system that follow up on the listing presentation:

* One template if you did not get the listing:
* Thank the Seller for their time and consideration
* Restate your services and advantages
* Provide your contact information
* One template if you did get the listing:
* Thank the Seller for their time and trust
* Restate your services/advantage
* Provide your contact information
* Repeat promises both you and the Seller made regarding property staging, marketing, or other considerations

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Prepare several copies of a Seller Packet that can be customized and left

with each Seller after the listing appointment. A Seller packet typically

includes, but is not limited to:

* The property marketing plan and related items
* Your personal marketing brochure
* Links to videos about you and your services
* Testimonials about your performance
* Agency disclosure pamphlet as required by the commission
* REALTOR® Code of Ethics brochure (if applicable)
* Seller’s Property Disclosure
* Appraisal education information
* A statistical report of MLS market activity
* Lead Based Paint and Radon Disclosure Booklet
* Flood Plain Acknowledgement Form
* Interesting and pertinent reports from local, state, or national real estate sources

\_\_\_\_\_\_\_\_\_\_ Complete 2 “Buyer’s Needs Analysis Interview Forms” (located in Appendix)

by interviewing friends and family members.

\_\_\_\_\_\_\_\_\_\_ Identify ways to add value, build rapport, establish confidence, and

demonstrate expertise with Buyers (may work well with above listed activity).

Some possibilities:

* Provide a vendor list (with disclaimer)
* Send newsletters
* Send emails with interesting market information
* Host a “thank you” party for all clients

\_\_\_\_\_\_\_\_\_\_ Develop a method for evaluating a property and its purchase potential *before*

showing it to Buyers:

* Speak with the Listing Agent
* Drive by the property to verify the location and to get a sense of curb appeal, etc.
* Ask other Sales Associates for anecdotal information
* Note the length of time the property has been on market

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Prepare several copies of a Buyer Package or save digital template in

Paperless Pipeline or a physical version that can be given to a Buyer at your

first meeting. A Buyer Package typically might include, but is not limited to:

* A letter of greeting
* Your business card
* Your personal marketing brochure
* Video links about you and your services - Testimonials
* (YOUR COMPANY NAME) promotions
* A statistical report of MLS market activity
* Agency Disclosure pamphlets as required by the commission
* REALTOR® Code of Ethics (if applicable)
* Fair Housing Brochures
* Lead Based Paint Disclosure
* Mediation pamphlet
* Buyer Representation Agreement
* Pertinent reports from local, state, or national real estate sources

\_\_\_\_\_\_\_\_\_\_ Create a prospecting program for the For Sale By Owner (FSBO) & Expired

properties – consider accessing your contact management system letter

library for templates to customize.

\_\_\_\_\_\_\_\_\_\_ Attend 2 Buyer showing sessions with experienced Sales Associates:

* Interview experienced Sales Associates about Buyers’ common buying motives and signals.
* Observe Buyers for typical buying signals during showing session

\_\_\_\_\_\_\_\_\_\_ Invest in having your own YouTube.com Channel

* Set up and film your own personal promotion video that is directed to the type of clientele you work with:
* Seller
* Buyer
* Transferee
* New Construction
* Investors

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Set and create your own template for virtual tours and property video

\_\_\_\_\_\_\_\_\_\_ Visit with in-house social media staff person to assist in refining your

social media presence

**Broker Sign Off**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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***Real Estate Practice Outline******Meeting Expectations***

Timeline Tasks: Month 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_



The following tasks are suggested for Month 2. Modify the tasks as necessary to fit your unique situation. At the end of the month, incomplete items may be carried over to a future Timeline by copying them into the blanks provided.

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Attend office training sessions/other functions.

\_\_\_\_\_\_\_\_\_\_ Identify and meet with professionals who can guide you while you build your

business:

* Accountant
* Attorney
* Lenders
* Title company representatives
* Chamber of Commerce representatives

\_\_\_\_\_\_\_\_\_\_ Determine what niche you will specialize in-if any. Examples of niche areas

include:

* First time buyers
* Foreclosures
* Investment buyers
* New construction
* Relocation
* Residential re-sale
* Seniors
* Suburban property

\_\_\_\_\_\_\_\_\_\_ Identify 2 - 3 community organizations to join:

* Enter new contacts into your contact management system

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Attend company listing and buying practices program, including those

pertaining to agency.

\_\_\_\_\_\_\_\_\_\_ Make an appointment with an Appraiser to observe how an appraisal is

completed on a property:

* Learn how a building is measured
* Outline the appraisal process and understand time frames and procedures
* Learn where the Appraiser gains his or her inventory in order to complete an appraisal
* Review a completed appraisal: note how and why monetary adjustments are made

\_\_\_\_\_\_\_\_\_\_ Interview in-house Lender and Title Company representatives and learn

about their product offerings

\_\_\_\_\_\_\_\_\_\_ Prepare and practice your responses to the typical challenges and

objections Buyers present:

* Interview experienced associates about the typical objections Buyers voice during the showing process.
* Interview associates about typical Buyer problems.
* Note how associates handle these issues and the dialogues they use with Buyers.

\_\_\_\_\_\_\_\_\_\_ Attend a property staging class to learn about:

* The use of color
* The use of different fabrics and materials
* Furniture placement
* The use of lighting

\_\_\_\_\_\_\_\_\_\_ Interview at least 2 Home Inspectors and learn about their fees and

procedures.

\_\_\_\_\_\_\_\_\_\_ Meet with 2 homeowner insurance salespersons to review issues related to

insuring residential properties.

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Attend 3 whole house inspections (with the approval of Home Owner, Buyer,

and Listing Agent).

\_\_\_\_\_\_\_\_\_\_ Complete the compilation of a geographic farm or people farm and enter it

into your contact management system.

* Geographic Farm:
* Select a market area where you wish to be known as the local resource for buying or selling real estate.
* Using a reverse directory or assessor’s records, compile a mailing list for that geographic region.
* People Farm:
* Gather the names and contact information for all members of associations or clubs that you belong to.
* Gather the names and contact information for all the professionals you work with on a regular basis.
* Enter all names into your contact management system.

**Broker Sign Off**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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***Real Estate Practice Outline******Meeting Expectations***

Timeline Tasks: Month 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_



The following tasks are suggested for Month 3. Modify the tasks as necessary to fit your unique situation. At the end of the month, incomplete items may be carried over to a future Timeline by copying them into the blanks provided.

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Contact your Broker and review how referrals are sent and received from

outside company resources. For example:

* + - * + What is the policy on paying referrals fees to licensees from other states?
        + What paperwork must be completed and turned in?
        + How is commission on a referral calculated and paid?
        + Does the referral form itself require a Broker’s signature?

\_\_\_\_\_\_\_\_\_\_ Visit all of the schools within your selling area:

* Introduce yourself to the principals and tour the school. Learn about their offerings.
* Enter new contacts into your contact management system.

\_\_\_\_\_\_\_\_\_\_ Meet with your local Chamber of Commerce and Economic Development

representatives:

* Introduce yourself to the directors and learn about ways you can become involved in the organization (if desired).
* Enter new contacts into your contact management system.

\_\_\_\_\_\_\_\_\_\_ Develop a “What Sellers Need to Know” booklet filled with house articles,

checklists, etc.:

* Obtain permission to use articles, etc., as needed.
* Available as PDF or physical product

\_\_\_\_\_\_\_\_\_\_ Develop a “What Buyers Need to Know” booklet filled with house articles,

checklists, etc.:

* Obtain permission to use articles, etc., as needed.
* Available as PDF or physical product

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Create a folder or specific location for all records pertaining to education

(completion certificates, designation information, etc.)

\_\_\_\_\_\_\_\_\_\_ Review and update your personal web site using the in-house social media

assigned personnel.

\_\_\_\_\_\_\_\_\_\_ Obtain from staff and modify Vendor Referral List:

* Compile a contact form for your clients that lists these vendors’ names.
* Include the proper disclaimer language (much as you do on the MLS listing form)
* Make sure any language used on this referral list is approved by (YOUR COMPANY NAME) or your Broker.
* Note: check to see (YOUR COMPANY NAME) already provides a service directory or other value-added customer service listing of vendors

**Broker Sign Off**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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***Real Estate Practice Outline******Meeting Expectations***

Timeline Tasks: Month 4:



The following tasks are suggested for Month 4. Modify the tasks as necessary to fit your unique situation. At the end of the month, incomplete items may be carried over to a future Timeline by copying them into the blanks provided.

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Find opportunities to work / volunteer in community organizations

\_\_\_\_\_\_\_\_\_\_ Fine tune your negotiating abilities:

* Take a negotiation skill building class.
* Talk to your Broker or other about their approaches to negotiating.
* Read *Integrity Selling* by Ron Willingham.
* Read *Getting to Yes* by Roger Fisher.

\_\_\_\_\_\_\_\_\_\_ For updates on changes impacting your career and selling focus, attend real

estate industry conventions/conferences. The following are meeting sources:

* Designation providers (e.g., CRS)
* Environmental Protection Agency (EPA)
* Fair Housing groups
* Home Builders of America
* Housing and Urban Development (HUD)
* State associations or local boards of REALTORS**®**
* The National Association of REALTORS**®**
* (YOUR COMPANY NAME)

**Broker Sign Off**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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***Real Estate Practice Outline******Meeting Expectations***

Timeline Tasks: Month 5: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_



The following tasks are suggested for Month 5. Modify the tasks as necessary to fit your unique situation. At the end of the month, incomplete items may be carried over to a future Timeline by copying them into the blanks provided.

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Establish a folder or other place for keeping articles, trade magazines, and

other industry-relevant material to read during down time (see Appendix for

some specific reading recommendations).

\_\_\_\_\_\_\_\_\_\_ For REALTOR**®** members:

* Contact your state association of REALTORS**®** and determine if there are any committees or task forces on which you can serve. (if applicable)
* Contact your local board of REALTORS**®** and volunteer for at least one committee a year. (if applicable)
* Participate in your local REALTORS**®** Political Action Committee (RPAC) events. (if applicable)

\_\_\_\_\_\_\_\_\_\_ For updates on real estate industry information, regularly reference on-line

resources. Suggested sites might include:

* National Association of REALTORS®**:** [www.realtor.com](http://www.realtor.com/)
* Your state association of REALTORS**®** website
* Your local board of REALTORS**®** website
* [www.realtytimes.com](http://www.realtytimes.com/) / [www.inman.com](http://www.inman.com) / www.rismedia.com

**Broker Sign Off**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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***Real Estate Practice Outline******Meeting Expectations***

Timeline Tasks: Month 6: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_



The following tasks are suggested for Month 6. Modify the tasks as necessary to fit your unique situation. At the end of the month, incomplete items may be carried over to a future Timeline by copying them into the blanks provided.

**Completion**

**Date Task /Activity**

\_\_\_\_\_\_\_\_\_\_ Review the requirements for license renewal in your state:

* Note the date your renewal is due and related procedures
* Make a plan for completing continuing education or other renewal requirements before the due date.

\_\_\_\_\_\_\_\_\_\_ Review and update your business plan & budget with help of your Broker.

\_\_\_\_\_\_\_\_\_\_ Review your marketing plan for listings and the accompanying materials -

update as needed.

\_\_\_\_\_\_\_\_\_\_ Review your personal marketing materials and update as needed.

\_\_\_\_\_\_\_\_\_\_ Review your materials for Buyers and update as needed.

\_\_\_\_\_\_\_\_\_\_ Review real estate designations and select one to begin working toward

obtaining in the next year. Information regarding REALTOR**®** designation

and certifications may be found at [www.realtor.org](http://www.realtor.org) under “education.”

\_\_\_\_\_\_\_\_\_\_ Gain information about the buying and selling public’s wants and needs by

designing a survey for past clients served by you or your company:

* Work closely with your Broker in implementing the survey.
* Adjust business plans and marketing materials accordingly.

**Broker Sign Off**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Listing Interview Form:**

***By Telephone***

**Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Address:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Telephone:** Office \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Mobile \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Home \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Fax \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**🔾 Appraisal Information**

Style of home/siding

Age of home

Sq Ft: above grade

Basement finished

Sq Ft: basement

# of bedrooms

# of full/half baths

# of fireplaces

# of garage stalls

Location of stalls

Outbuilding/Fence

Sprinkler system

Deck/Patio Pool – inground

Security system

Intercom

Humidifier

Central vac

Mortgage payoff

Monthly payment

Price expected?

**Listing Interview Form:**

***On-Site/In Person***

**🔾 Personal Information**

Employment

Family

**🔾 Urgency**

How soon do you want to move?

Where do you want to move?

**🔾 Authority**

Who else is involved in this sale?

Other financial assistance needed?

What home price had you considered?

How did you arrive at that amount?

**🔾 Experience**

How many homes have you owned?

How long have you lived in your current residence?

Are you working with another real estate agent?

Will you owner finance?

**🔾 Details**

What three things would you change about your home?

What three things do you like the best about your home?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What is most important to you? Timing Price Convenience

What are your major concerns?

What services provided by a REALTOR**®** are most important to you?

What will you do with any pets during showings?

Any special instructions regarding showings?

Do you have copies of the following?

Appraisal: recent (within the last year) Yes No

Covenants & Restrictions of subdivision Yes No

Easements on the property Yes No

Inspection reports**:** fireplace**,** AC**,** furnace Yes No

Original Title Policy Yes No

Property survey Yes No

Tax bills Yes No

Utility bills (to compile a year report) Yes No

Warranties**:** appliances, AC, furnace Yes No

Warranty**:** termite treatment (transferable?) Yes No

Who is listed on the title?

Do you have anything that will affect the status of your title? (mechanics lien, second mortgage, easements, tax lien etc.)

Is there anything you can think of right now that could make this move any easier for you?

**🔾 Review**

\_\_\_\_\_ Listing Agreement \_\_\_\_\_ Marketing the Listing

\_\_\_\_\_ Agency Representation \_\_\_\_\_ Seller Reports

\_\_\_\_\_ Pre-qualification v. Pre-approval \_\_\_\_\_ Items to Address/Repair

\_\_\_\_\_ Costs of FHA/VA Financing \_\_\_\_\_ Showings & Appointments

\_\_\_\_\_ Seller Disclosure \_\_\_\_\_ Offer Presentation/Counter Offers

\_\_\_\_\_ Lead Paint Disclosure - if applies \_\_\_\_\_ Earnest Money

\_\_\_\_\_ Seller Closing Costs \_\_\_\_\_ Contingencies

\_\_\_\_\_ Personal Property \_\_\_\_\_ Inspections: Whole House

\_\_\_\_\_ "As Is" Situation - if applies \_\_\_\_\_ Inspections: Wood Pests

\_\_\_\_\_ Appraisals \_\_\_\_\_ Closing and Possession

**🔾 Relocation**

Company assistance:

Name Address

Phone

Contact:

Name Number

Will they cooperate with me?

**(YOUR COMPANY LOGO HERE)**

**Buyer Needs Analysis Form**

**Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Property Address:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Telephone:** Office \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Mobile \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Home \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Fax \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**🔾 Personal Information**

Employment Family

**🔾 Urgency**

How soon do you want to move? Where do you want to move?

**🔾 Authority**

Who else is involved in this sale?

Other financial assistance needed?

Have you met with loan officer?

Are you pre-approved?

**🔾 Experience**

How many homes have you owned? How long have you lived in your current residence?

Are you working with another real estate agent?

**🔾 Desired Home Information**

What features are most important to you in your new home?

Style of home/siding

Age of home

Sq Ft: above grade

Basement finished

Sq Ft: basement

# of bedrooms

# of full/half baths

# of fireplaces

# of garage stalls

Location of stalls

Outbuilding/Fence

Sprinkler system

Deck/Patio Pool – inground

Security system

Intercom

Humidifier

Central vac

Mortgage maximum

Monthly payment maximum

Price range?

What three things are most important for your new home?

What three things do you not want in a home?

What could you do without if you had to?

**🔾 Qualifications**

What is the maximum amount of cash available to buy a home?

If we find the right home with everything, will you be prepared to buy today?

What is the maximum monthly payment you would even consider?

How long have your been looking?

How many homes have you seen?

Have you seen anything you liked? Why did you not purchase?

Are you new to the area? Yes No

Do you Rent or Own? Rent Own

If you own, is your home under contract now? Yes No

**🔾 Review**

\_\_\_\_\_ Buyer Agency Agreement

- Seller v. Buyer Agency

\_\_\_\_\_ Types of Loans/Cash to Close

\_\_\_\_\_ Pre-Qualify v. Pre-Approval

\_\_\_\_\_ Seller Disclosure

\_\_\_\_\_ Lead Paint Disclosure - if applies

\_\_\_\_\_ Buyer Estimated Closing Costs

\_\_\_\_\_ Showings & Appointments

\_\_\_\_\_ Offer Presentation/Counter Offers

\_\_\_\_\_ Earnest Money

\_\_\_\_\_ Contingencies

\_\_\_\_\_ Inspections: Whole House

\_\_\_\_\_ Inspections: Wood Pests

\_\_\_\_\_ Appraisals

\_\_\_\_\_ Closing and Possession

**🔾 Relocation**

Company assistance:

Name Address

Phone

Contact:

Name Number

Will they cooperate with me?

**(YOUR COMPANY LOGO HERE)**

**Transferee Questionnaire**

Transferee Name

Spouse Name

Address

Phone Number to Call \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Work \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell

Best Time to Call

Current Employment

New Place of Employment

Spouse Occupation

Name of Referring Office and Person

Education Needs

Names and Ages of Children

Familiar with the area and prices?

**Special Needs (for example – Pet care, rentals, sport opportunities, etc)**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of house hunting trip

Hotel Arrangements made?

May I make arrangements for you? Yes No

Hotel

Airport pick up

House hunt

Timing of the move

Date when new job begins

Is this a military transfer?

3rd Party Relocation handled by:

Person \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell

What can we do to make move easier?

Association information needed?

Do you want lender information?

Maximum distance willing to commute?

Does the home need to be in move-in condition? Yes No

**🔾 Desired Home Information**

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**🔾 Review**

\_\_\_\_\_ Buyer Agency Agreement

- Seller v. Buyer Agency

\_\_\_\_\_ Pre-Qualify v. Pre-Approval

\_\_\_\_\_ Seller Disclosure

\_\_\_\_\_ Lead Paint Disclosure - if applies

\_\_\_\_\_ Buyer Estimated Closing Costs

\_\_\_\_\_ Showings & Appointments

\_\_\_\_\_ Offer Presentation/Counter Offers

\_\_\_\_\_ Earnest Money

\_\_\_\_\_ Contingencies

\_\_\_\_\_ Inspections: Whole House

\_\_\_\_\_ Inspections: Wood Pests

\_\_\_\_\_ Appraisals

\_\_\_\_\_ Closing and Possession

**🔾 Relocation Packet Date Sent \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

\_\_\_\_\_ Questionnaire \_\_\_\_\_ Business Cards

\_\_\_\_\_ Resume on Self \_\_\_\_\_ Hotel/Transportation Info

\_\_\_\_\_ Schedule/Showings, etc. \_\_\_\_\_ Transfer Booklet

\_\_\_\_\_ MLS Tear Sheets (that apply) \_\_\_\_\_ Homes Magazine

\_\_\_\_\_ Financial Pack \_\_\_\_\_ Map

\_\_\_\_\_ Utilities \_\_\_\_\_ Sports Schedules

\_\_\_\_\_ Newspaper Info/Newspaper \_\_\_\_\_ Club and Social Info

\_\_\_\_\_ Medical Facilities \_\_\_\_\_ Community/State Info

\_\_\_\_\_ Restaurants \_\_\_\_\_ Shopping

\_\_\_\_\_ Phone Book/Emergency Numbers \_\_\_\_\_ Schools

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