



200+ Critical Steps
We Take To Get Your Home Sold

Pre-Listing Activities

1. On first contact, use pre-listing interview questions. Note: This will help with all aspects of the listing: timing, motivation, and the CMA
2. Schedule an appointment with the Seller for the listing presentation
3. Do a “drive-by curb appeal assessment” to view the outside of the subject property
4. Take pictures of the outside of the property to prepare a prototype listing flyer, and update your flip book photo on the outside with the photo (if time permits)
5. Send your pre-listing email and flipbook, asking Sellers to review before the appointment, if possible. Or, deliver a pre-listing package for Sellers to review before the appointment. This will answer many questions for the Sellers and help prepare for the appointment
6. Print or save a digital copy of your Marketing Plan and Listing Protocol for the Sellers with the Critical Steps We Take To Get Their Home SOLD!
7. Use MLS, Realist, and Remine to confirm ownership, square footage, legal description, and taxes
8. Run a Comprehensive Comparable Market Analysis (CMA) including 6-9 months of Active, Pre-MLS, Contingent, Pending, & Sold properties using MLS, Moxi Present, or Cloud CMA
9. Study the Competitive Market Analysis (CMA) to establish a market position
10. Research “Average Days on Market” for properties of this type, price range, and location
11. Download and review property tax information. Verify legal names of owner(s) in the county’s public property record via Realist or Remine
12. If the property is in a trust or a business name, ask the Seller(s) for a copy of the organizational documents to be provided to the title company
13. Obtain a copy of the subdivision plat/site plan, if applicable
14. Research and verify legal description
15. Research Homeowner Association (HOA) Membership
16. Research property’s current use and zoning
17. Confirm school boundaries for the property using county and school district records
18. Create a new loop in Dotloop to prepare your listing paperwork
19. Preview active listings in the neighborhood and drive by any pending, sold, and expired properties in the area. Research any competitive FSBO properties

Pre-Listing Activities

20. Review the listing appointment checklist to ensure that all steps and actions have been completed
21. Print a copy of your flipbook for the in-person presentation
22. Print listing paperwork including the listing agreement and all disclosures for your appointment

Listing Appointment Protocol And Strategic Marketing Plan

23. Take your prepared materials: CMA/Comparative Market Analysis, flipbook or printed “The Home Selling Experience”, Marketing Plan “Critical Steps You Take To Get Their Home Sold”, Showing Time Report, DotLoop Listing Paperwork, Seller homework, a yard sign, a notebook, and a pen
24. Arrive on time for the appointment with the Sellers to tour the property
25. Perform exterior “Curb Appeal Assessment” of property and take notes with your Seller
26. Begin your inside tour of the property and ask to take pictures to help you with the staging process. Remind the Seller the photos are just for your memory and will not be posted online
27. Begin your consultation with the Seller, preferably at a table
28. Conduct a needs assessment for Seller and subject property
29. Give Seller an overview of current market conditions and projections
30. Review agent and company’s credentials and accomplishments in the market
31. Present the company’s profile and position or “niche” in the marketplace
32. Present CMA to Seller, including current competing listings, solds, expireds and canceled
33. Offer pricing strategy based on professional judgment and interpretation of current market conditions
34. Discuss goals with Seller to market property effectively
35. Demonstrate market power of enlisting the entire MLS to go to work selling their property

Listing Appointment Protocol And Strategic Marketing Plan

- 36. Explain the local market power of BHGRE Kansas City Homes
- 37. Review the online exposure the listing will receive from the Home Selling Experience Book
- 38. Highlight the work that the brokerage and agent do “behind the scenes” and the agent’s availability on weekends
- 39. Explain the agent’s role in taking calls to screen for qualified buyers and protect Seller from “curiosity seekers”
- 40. Present and discuss strategies to get the Seller’s home sold
- 41. Explain the benefits of exclusive Pinpoint Marketing, XpressDocs, and the “Tell 25” program
- 42. Make time to answer questions from the Home Selling Experience Book
- 43. Review and explain all clauses in Listing Agreement and Addenda and obtain Seller’s signature

Once Property Is Under Listing Agreement

- 44. Provide Seller with signed copies of Listing Agreement
- 45. Measure interior room sizes
- 46. Confirm lot size via owner’s copy of the certified survey, if available
- 47. Note from the Seller any and all unrecorded property lines, agreements, easements, etc.
- 48. Obtain house plans, if applicable and available
- 49. Review and retain plat map in property’s listing file and also scan into MLS supplements
- 50. Prepare showing instructions for buyers’ agents and agree on showing times with Seller
- 51. Obtain current mortgage loan information: companies and loan account numbers
- 52. Verify current loan information with lender(s)
- 53. Check assumability of loan(s) and any special requirements
- 54. Discuss possible buyer financing alternatives and options with the Seller
- 55. Review current appraisal, if available
- 56. Identify the Homeowner Association contact person, if applicable
- 57. Verify Homeowner Association fees with manager - mandatory or optional and current annual fee

Once Property Is Under Listing Agreement

58. Order copies of Homeowners Association documents, if applicable. Title company can provide
60. Calculate average utility usage from the last 12 months of bills
62. Water System: Calculate average water fees or rates from the last 12 months of bills
64. Natural Gas: Research/verify availability and supplier's name and phone number
66. Verify if Seller has any transferable Termite Warranty, or invoices from any previous treatments
69. Prepare a detailed list of property amenities and assess market impact
71. Explain time/money/risk reduction savings of ordering a pre-inspection/termite pre-inspection during the listing period
74. If applicable for the property, have a conversation with the Seller about hiring a stager to better prepare for listing
76. Explain the benefits of a Home Warranty to Seller, especially Seller's coverage
78. Keep a copy of the Home Warranty in the property file for conveyance at the time of sale
80. Supply Seller's Disclosure form and obtain completed form from Seller
59. Determine the electricity provider's name and phone number
61. Research and verify whether the home is on public sewer or a septic system
63. If on well water: Confirm well status, depth, and output from Well Report
65. Verify security system, current term of service, and whether owned or leased
67. Determine the need for lead-based paint disclosure, if built prior to 1978
68. Prepare a detailed list of property's "Inclusions and Conveyances with Sale"
70. Prepare a detailed list of property's "Inclusions and Conveyances with Sale"
72. Compile a list of completed repairs and maintenance items
73. If applicable, schedule staging of the property
75. Send "Vacancy Checklist" to Seller if the property is vacant
77. If selected, assist Seller with ordering the Home Warranty
79. Have an extra key made for the lockbox
81. Install a yard sign and lockbox
82. Deliver shoe covers and feature cards, if applicable

Once Property Is Under Listing Agreement

83. Verify if the property has rental units involved, and if so:
 - Make copies of all leases for retention in the listing file
 - Verify all rents and deposits
 - Have tenants authorize lockbox
 - Inform tenants of listing and discuss how showings will be handled
84. Complete “New Listing Checklist”
85. Review results of Curb Appeal Assessment with Seller and provide suggestions to improve the salability
86. Review results of Interior Appeal Assessment and suggest changes to shorten time on the market
87. Hire a photographer to take 25+ high-quality photos for MLS; consider drone shots to stand out.
88. Organize, coordinate, and design a creatively rich property description
89. If applicable, prepare the Seller for a septic inspection
90. Discuss any fixtures/attachments thereto that are excluded from sale

Entering The Property Into The Multiple Listing Service

91. Prepare MLS Input Sheet, available in DotLoop - Agent is responsible for “quality control” of listing data
92. Have Seller verify the MLS input data sheet to verify the accuracy, if necessary
93. Proofread MLS database listing and verify proper placement in mapping location
94. Enter property data into MLS via the “Input” tab
95. Input all necessary disclosures into MLS Supplements
96. Prepare the cover sheet for the disclosure with offer submission information
97. Update showing instructions with ShowingTime
98. Upload pictures and reorder them to ensure the best position for marketing purposes
99. Email Seller link to the MLS listing photos so they can view pictures before the listing goes live
100. Schedule Broker/Agent tour, if applicable, of new listing

Entering The Property Into The Multiple Listing Service

- 101. Once live and entered in Showing Time, set up a “mock showing” to test the notification system
- 102. Determine the electricity provider’s name and phone number
- 103. Send Seller(s) link to listing from KansasCityHomes.com so they can view and share from your website
- 104. After the listing goes live, check the top 5 portal sites to ensure all listing data has been feed correctly, sometimes this takes a few hours after the listing is active in the MLS

Marketing The Property

- 105. Schedule, promote, and host public open houses if authorized by the Seller
- 106. Encourage other agents in the company to hold open houses on days you might not be available
- 107. Hold a Company Mega Open House Weekend, if coming soon
- 108. Create ads for property detail profile and review with Seller
- 109. Coordinate showings with Sellers, buyers, and other Realtors®
- 110. Return all inquiries via call, text, and email - weekends included
- 111. Respond promptly to registered buyers on KansasCityHomes.com whose criteria matches the subject property
- 112. Use reverse prospecting tool in MLS and email property info to applicable agents
- 113. Send targeted email list a notification of new listing taken, with pictures and property details
- 114. Prepare an email contact list of Top agents having sold or listed a home in the neighborhood in the last year. Include Sphere of Influence list and past customer list
- 115. Activate Boost social media advertising for property listing on Facebook
- 116. Review comparable MLS listings regularly to ensure the property remains competitive in price, terms, conditions, and availability
- 117. Order “Just Listed” postcards - send directly to the neighborhood of the subject property and consider additional postcards to a larger audience like your sphere of influence
- 118. Prepare information and feedback reports from Showing Time

Marketing The Property

- 119. Put Sellers on a Moxi Neighborhood News for their subdivision or area to stay updated
- 120. Review List Trac data and prepare a report to provide for Seller's review
- 121. Prepare property marketing brochure or flyers for Seller's review
- 122. Arrange for printing and delivery of marketing brochures or flyers
- 123. Email marketing brochures to real estate offices and target agents
- 124. Prepare single property websites via Moxi Impress
- 125. Provide marketing data to appropriate relocation networks
- 126. Promptly submit price changes in MLS listing database
- 127. Convey price changes promptly to all platforms and resend all marketing materials via email, social media, and websites
- 128. Reprint/supply property brochures promptly and as needed
- 129. Send feedback emails to buyers' agents after showings
- 130. Lender to provide a sample cost flyer for the property with payment estimates
- 131. Discuss feedback from showing agents with Seller to determine if adjustments will accelerate the sale
- 132. Place regular weekly update calls to Seller to discuss marketing and pricing
- 133. Provide bi-weekly updates via email to the Seller detailing market changes, new listings, pending and solds since last update. Include summary of showing feedback and other important data points
- 134. Refresh the order of the pictures and property description to promote fresh SEO opportunities.
- 135. If any material changes to the property occur during the active phase, promptly upload to MLS and provide an email copy to showings agents once Sellers have made updates to the property disclosure
- 136. Review comparable MLS listings regularly to ensure the property remains competitive in price, terms, conditions, and availability

The Offer And Contract

137. Receive and review all purchase offers contracts submitted by buyers or buyers' agent
140. Prepare an offer summary cover sheet for Seller
142. Counsel Seller on offers, in person, if possible. Explain the merits and weaknesses of each component of each offer
143. Contact buyer's agent to review buyers' qualifications and discuss the offer
145. Document all communication between parties throughout the negotiation, especially if the information is conveyed via phone
146. Contact the loan officer to introduce yourself and review buyers' pre-approval and qualifications
148. Counsel Sellers on how to best negotiate the contract, setting a time limit for loan approval, inspection period, closing date, and other important terms
151. Prepare a full contract and addenda package and deliver it to the appropriate title company
153. Advise Seller of any additional contracts submitted before prior to closing
154. Verify with Showing Time that the status change has occurred
138. Evaluate offer(s) and prepare a "Net Proceeds Sheet" on each for Seller
139. Provide via email or in person the full offer and all addenda
141. Collect from Seller and provide buyer/buyers' agent any additional details or information requests in regard to the Seller's disclosure, receipts for repairs, transferable warranties, and the like
144. Collect from Seller and provide buyer/buyers' agent any additional details or information requests in regard to the Seller's disclosure, receipts for repairs, transferable warranties, and the like
147. Confirm buyer is pre-approved by Loan Officer in writing
149. Ensure closing and possession day/time are clearly negotiated and communicated prior to acceptance
150. Prepare and convey any counteroffers, acceptance, or amendments to the buyer's agent
152. Once the Contract is fully executed, provide Sellers with a detailed email of the next steps and what to expect, with a summary sheet of important dates and contact information
155. Submit change status of the property to MLS

The Offer And Contract

- 156. Deliver information on the subject property from other sources, i.e. utilities, etc., to the buyer
- 159. Confirm appointment for termite inspection with Seller, if applicable
- 161. Confirm buyer and buyer's agent have received title insurance commitment
- 163. When a Contract is accepted and signed by Seller, send signed copies of Contract to Seller, buyer's agent/buyer, title company, and mortgage company
- 165. Obtain written verification for delivery and receipt of the earnest deposit, either via check, certified funds, or an electronic method
- 167. Prepare a full Contract package to provide to our in-house compliance and processing
- 168. Advise Seller of any additional contracts submitted before prior to closing
- 170. Submit change status of the property to MLS
- 171. Verify with Showing Time that the status change has occurred
- 157. If applicable, confirm septic system inspection and coordinate scheduling of pumping
- 158. Confirm appointment for the home inspection with Seller if applicable
- 160. Deliver Water Well Flow Test Report, if applicable. Make copies for buyer and property listing file
- 162. If responsible for ordering a home warranty plan, submit confirmation to title company for payment
- 164. Save a copy of the executed contract for yourself and ensure all originals are kept in a safe and secure location
- 166. Send copies of earnest money check to Seller, buyer's agent/buyer, mortgage company, and keep one copy and give the original to the title company with the Contract
- 169. Once the Contract is fully executed, provide Sellers with a detailed email of the next steps and what to expect, with a summary sheet of important dates and contact information

Tracking The Loan Process

- 172. Follow the loan process by keeping in touch with the loan officer on a regular basis
- 174. Relay final approval of buyer's loan application to Seller
- 176. As soon as title commitment is available, review in detail to mitigate any title issues so that may be resolved prior to closing
- 173. Forward any updates from the lender, verbal or written, to the Seller to keep apprised of progress and/or potential hurdles
- 175. Keep track of the appraisal timeline to ensure that it has been ordered by the lender in a timely manner

Home Inspection

- 177. Coordinate buyer's professional home inspection appointment time with Seller
- 179. Review all provided inspection reports with the Sellers
- 181. Oversee Seller's completion of all required repairs prior to closing
- 183. Obtain repair receipts as they are received by the Seller
- 178. Prepare the Sellers for the home inspection process with a detailed "What to Expect" email
- 180. Monitor compliance with home inspection timelines and requirements set forth in the Contract
- 182. Recommend or assist Seller with identifying and negotiating with contractors to perform any required repairs

Appraisal

- 184. Confirm appraisal appointment with Seller, and attend, if possible
- 186. Consider providing comparable sales used in market pricing to the appraiser, if appropriate
- 188. Counsel Seller if the appraisal comes in lower than the contracted sales price or requires repairs
- 185. When attending the appraisal, inform the appraiser of recent updates, repairs, or multiple-offer situations
- 187. Check with the lender or buyer's agent on appraisal report, that it was received and is free of issues

Closing Preparations And Duties

- 189. Coordinate closing process with Seller, buyer, buyer's agent, lender, and title company
- 190. Update Seller's closing forms and files
- 191. Confirm the location where closing will be held
- 192. Ensure all parties have the forms and information needed to close the sale
- 193. Assist in solving any title problems (boundary disputes, easements, etc.), as applicable
- 194. Confirm closing date and time and notify all parties
- 195. Pay close attention to all pro-rated taxes, Homeowner's Association, utility, commission, home warranty, and other applicable figures and prorations to ensure accuracy on the settlement statement
- 196. Work with buyer's agent in scheduling and conducting buyer's Final Walk-Thru prior to closing
- 197. Request a copy of closing documents from the closing agent
- 198. Request final closing figures from the title company and carefully review figures to ensure accuracy of preparation
- 199. Review all closing documents carefully for errors
- 200. Forward closing documents to absentee Seller as requested
- 201. Review documents with the closing agent
- 202. Coordinate this closing with Seller's next purchase and resolve any timing problems, if applicable
- 203. Have a "no surprises closing" so Seller receives an accurate disbursement at closing
- 204. Coordinate the possession details with all parties to ensure a smooth transition
- 205. Refer Sellers as Outgoing Referral to Corporate Relocation Department at their destination, if applicable
- 206. Verify that the listing is changed to sold in the MLS, verifying sale date, price, selling and listing broker, and agents' ID numbers, etc.
- 207. Close out listing in all appropriate files

Follow Up After Closing

- 208. Ask the Seller to complete a “5-star” review and testimonial
- 209. Check-in with the Seller a week or so after closing and possession to ensure their happiness
- 210. Respond to any follow-up calls and provide any additional information required
- 211. Enroll Seller in Moxi follow-up campaigns like “Neighborhood News” to continue to stay in touch



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