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VIP Listing
Seller Tools

Prelisting Lead Sheet

Date: _____

| | |
|--|------------------------|
| CONTACT INFO | |
| Name _____ | |
| Email _____ | |
| Street Address _____ | Children's Names _____ |
| _____ | _____ |
| Home Phone _____ | Cell Phone _____ |
| Work Phone _____ | Fax _____ |
| What is the best way to get in touch with you? | What times are best? |

(Check if appropriate)

READY

1. Your reason for selling _____
2. Moving to _____
3. Already working with a buyer sales representative? YES NO
4. Time frame? _____
5. Corporate relocation assistance? YES NO
6. Considering FSBO? YES NO
7. Your motivation (circle one) | 2 3 4 5 6 7 8 9 10

HOUSE

8. Could you tell me a little bit about your home? _____

9. Square feet? _____
10. Bedrooms _____
11. Bathrooms _____
12. Type of house/stories _____
13. Owned _____ years
14. Updates to home _____

15. Pool YES NO
16. Your assessment of home's negatives _____

17. Your assessment of home's condition:
 excellent good fair poor
 (Check if appropriate)

ABLE

18. Your assessment of home's value \$ _____

19. You owe? \$ _____

20. You want to net? \$ _____

(Check if appropriate)

WILLING

21. How did you hear about me? _____

22. Three things you want from a real estate sales representative:

a. _____

b. _____

c. _____

23. Interviewing other representatives? Who? _____

SET THE APPOINTMENT

24. Sole owner of the home? YES NO

I'd like to set an appointment to meet with you for a complimentary consultation that will last an hour to an hour and a half. I'll take you through the home-selling process, I'll learn about your expectations and your goals, and I'll give you the opportunity to learn about what I offer so I can represent you.

Would _____ or _____ be a better time for you?

Appointment Date:

Time:

Your Assessment

Personality type? _____

Is it going to be a hard or an easy move? Hard Easy

Motivation level *(check all that apply)* High Medium Low

Action: Make an Appointment Drip Refer

Prequalifying Form

Seller(s) Name(s): _____

Address: _____ Phone: _____

Appointment Date: _____ Time: _____ Location: _____

1. Do you have about 5 minutes so I can ask you some very important questions before I come out to meet you?
2. Once you meet with me and hear my great marketing plan, do you plan to list with me at that time? If not, please tell me the perfect timeframe for you.
3. How did you hear about me?
4. Where are you moving to?
5. Why are you moving there?
6. How soon do you have to be there?
7. If we sell your home in the next 30 days, will that pose a problem for you? If "yes," what would the problem be?
8. What would happen if your home did not sell?

9. When I meet with you, how much will you want to list your home for?

10. Tell me, what's the price you will not go below?

11. How much do you owe on the property?

12. Will you quickly describe your home for me?

13. How would you rate your home on a scale of 1–10
(10 being the highest)?

14. What would make it a 10?

15. I'll be sending you a packet of information. Will you take
a few minutes to review it before we meet?

16. Do you have any questions before we meet?

17. Will all decision-makers be there when we meet?

18. Just so you know, our meeting will take between _____ and ____ minutes, OK?

19. I look forward to meeting with you on _____ at _____.

Home Evaluation Form

EXTERIOR

Stories: 1 2

Brick Sides: 1 2 3 4 Stone Sides: 1 2 3 4 Frame Sides: 1 2 3 4

Roof: Wood Composition Metal

Foundation: Slab Pier and Beam

Fence Type: Wood Chain Link None Wrought Iron Other _____

Lot Description: Normal Huge Corner Level Irregular Cul-de-sac

Tree Size: Small Medium Large

View: City Green Belt No View

Flood Plain: Yes No

Builder: _____

Features: Gutters Curb Pool Sidewalk Sprinkler Carport Hot Tub
 Porch Deck Screened Porch Extended Patio Covered Patio

Garage Spaces: 1 2 2.5 3 3.5 4

Doors: Double Single Front Side Rear-Entry Door Opener How Many _____

Security System: Owned Leased

Community Amenities: Pool Park/Playground Lake Hike/Bike Trail Golf Course
 Tennis Court Community Centre

UTILITIES

Heat: Central Gas Electric Heat Pump Zoned Other _____

A/C: Central Gas Electric Heat Pump Prg Tstat Zoned Other _____

Water: City Well MUD Private Other _____ Water Softener System
 Loop Only # Water Heaters _____

Sewer: City Septic MUD Other _____

Energy: Solar Screens Double Pane Windows

INTERIOR

Formal Dining: Open Crown Chair Rail Laminate Tile Vinyl Wood Carpet

Breakfast Room: Open Bay Window Laminate Tile Vinyl Wood Carpet

Family Room: Carpet Tile Vinyl Wood Pergo Ceiling Fan Crown
 Fireplace Gas Log Coffered Ceiling Vaulted Ceiling Built-Ins

Formal: Carpet Tile Vinyl Wood Pergo Ceiling Fan Crown
 Fireplace Gas Log Coffered Vaulted Built-Ins

Gameroom: Carpet Tile Vinyl Wood Pergo Ceiling Fan Crown
 Fireplace Gas Log Coffered Vaulted Built-Ins

Kitchen: Island Pantry Backsplash Open to Family Room Breakfast Bar Tile
 Carpet Vinyl Laminate Other _____

Countertops: Laminate Tile Corian-Type Granite Marble Quartz

Appliances: Dishwasher Disposal Microwave Vent Hood (Exterior Recirculating)
 Range Cooktop Free Standing Gas Electric Other _____

Master: Carpet Tile Vinyl Wood Up Down Built-Ins Crown
 Ceiling Fan WIC Coffered Ceiling Vaulted Ceiling Sitting Area

BR #2: Carpet Tile Vinyl Wood Up Down Built-Ins Crown
 Ceiling Fan WIC Coffered Ceiling Vaulted Ceiling Sitting Area

BR #3: Carpet Tile Vinyl Wood Up Down Built-Ins Crown
 Ceiling Fan WIC Coffered Ceiling Vaulted Ceiling Sitting Area

BR #4: Carpet Tile Vinyl Wood Up Down Built-Ins Crown
 Ceiling Fan WIC Coffered Ceiling Vaulted Ceiling Sitting Area

BR #5: Carpet Tile Vinyl Wood Up Down Built-Ins Crown
 Ceiling Fan WIC Coffered Ceiling Vaulted Ceiling Sitting Area

Other Rooms: Office Other _____

Label: MUD HOA Other

Disabled Access: Yes No

Utility Room: Inside Outside Built-Ins Sink Freezer Space Upstairs Downstairs

Dryer Connection: Gas Electric

Prioritizing Needs

Step 1

On a scale from 1–10, with 10 being very desirable and 1 being not desirable at all, what ONE THING could happen to make the sale of your home a 10 for you?

What is important to you about (above answer)? _____

Step 2

What one thing could we add to make the sale a 10+ for you? _____

What is important to you about (above answer)? _____

Step 3

If we could add just one other thing, thus making this sale a 10++ for you, what would it be? _____

What is important to you about (above answer)? _____

Your goal is to get the sellers focused and to find their most valued criteria!

Listing Consultation Checklist

- Greet Sellers:** Confirm you are here for the scheduled appointment and that the decision makers are present. Enter.
- Check on the Prelisting Packet:** Check on whether sellers have looked at the prelisting packet and whether they have completed seller paperwork.
- Build Rapport:** Use scripts provided to establish a friendly, professional, and trusting relationship with sellers; this process will continue throughout the appointment.
- Consult with Sellers:** Be sure they know this appointment is about them and achieving their goals and that it is meeting their most critical needs.
- Evaluate the Home:** Tour the home. Whether you tour with or without the sellers is your choice. Your goal is to note any features that may impact pricing, note property condition, and demonstrate to sellers you understand what their home offers.
- Discover and Prioritize Needs:** Use worksheets to walk through questions that establish their top goals and needs from the sale, and to prioritize those needs with their agreement about priority order. Take notes on the worksheets.
- Present Your Value Proposition and Marketing Plan:** Walk through the features of your experience and service; show sellers how you will market their home to buyers and buyer representative.
- Check for Commitment:** Be sure sellers have heard your key messages to this point and that they are buying into your messages.
- Present Your Price Recommendation:** Present your CMA (pricing analysis) and your recommended list price. Walk them through the steps you went through to arrive at your conclusion.
- Set Mutual Expectations:** Review what sellers can expect from you—from the listing agreement signing to the sale and closing—and what you need from them.
- Handle Any Unresolved Questions or Objections:** Check to be sure the sellers have no unanswered questions. Tie up any loose ends on what will happen.
- Close:** Ask for their business and get their signatures on the listing agreement.

Pricing Strategies Checklist

| Six Pricing Strategies | Yes |
|---|-----|
| 1. Know what sells – always evaluate for both competitive price and marketable condition | |
| 2. Know what sellers can and can't control – communicate what does not matter in pricing (what they paid; what they need; what they want; what their neighbour sold for; what another sales representative says it's worth; cost to rebuild) | |
| 3. Understand the window of opportunity – be persuasive about the importance of pricing right the first time, and being in great condition, to capture peak interest in the first few weeks on the market | |
| 4. Price to reflect market movement – price to reflect the direction the market is moving and the speed of change | |
| 5. Price ahead of the market – price so your seller does not get caught chasing the market down, or does not miss their maximum opportunity in a rising market | |
| 6. Don't be afraid to be brutally honest – ask, "do you want me to tell you what you want to hear, or do you want to hear the truth (about price and condition)?" | |

Communication Checklist

| Communication Tips | I Do |
|--|------|
| 1. Follow Preferences: Always ask and learn about your customer's preferred communication method and timing—is it phone, email, text message? Twice a week? | |
| 2. Match Style: In person or on the phone, always seek to match their communication style. | |
| 3. Always Update: Updates should happen even when there may be no new information to share. | |
| 4. Be Prompt: Always respond as soon as possible, or on the expected schedule. | |
| 5. Never Talk Down: Always communicate as a partner with your customer. | |
| 6. Keep a Log: Maintain a communication log in your eEdge database so you are always reminded of what was said in the last contact. | |
| 7. Decision-Maker Focus: Always include all true decision-makers. | |
| 8. Great Attitude: Always be enthusiastic and positive. | |

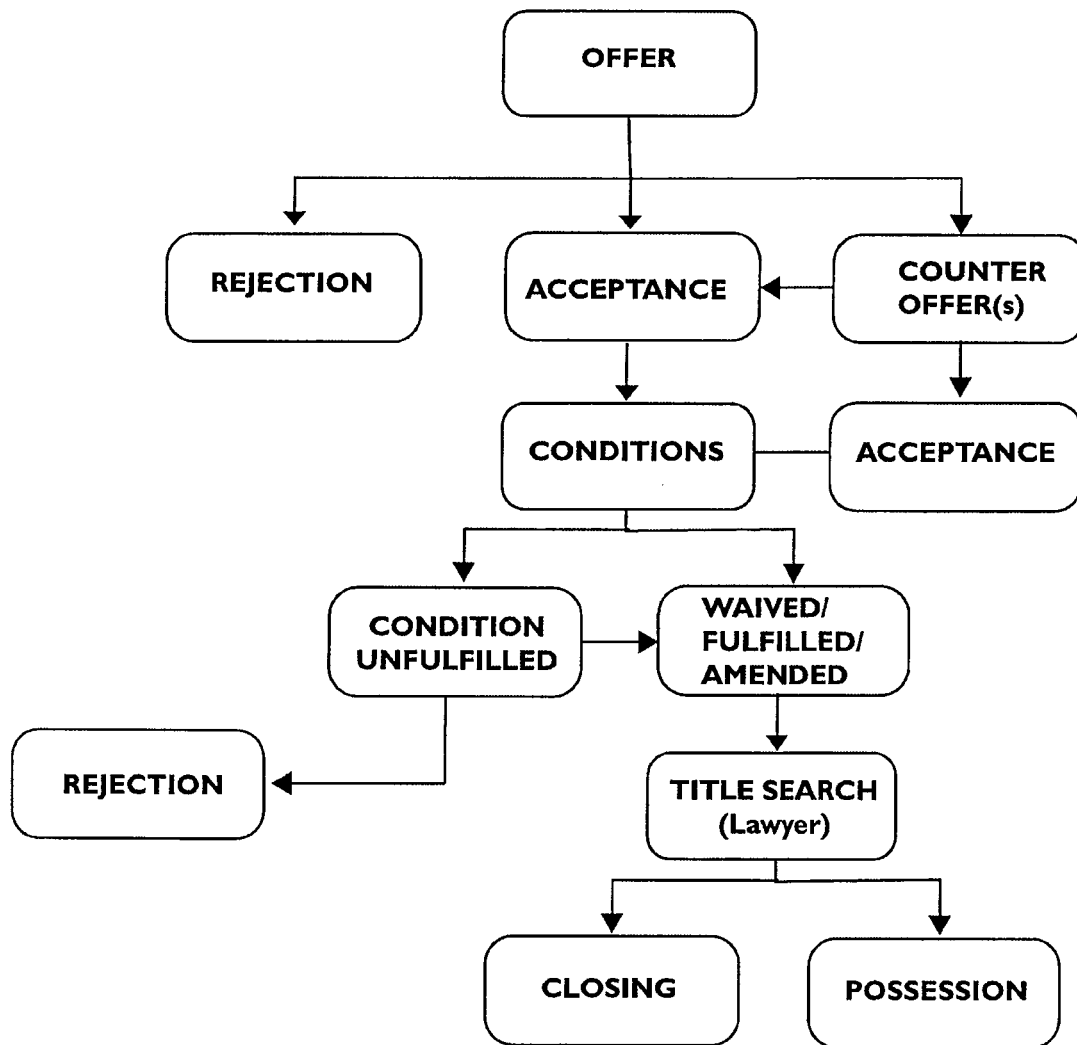
Service Summary Checklist

| Service You Provide | Value to Customer | Done/ In Progress |
|---|---|----------------------|
| Showing Feedback | Shows you are on top of things; may show them why pricing or staging needs to improve. | |
| IVR (Interactive Voice Response) Feedback | Answer all calls promptly—they may be leads for this or other properties; let sellers know how many calls their property is attracting. | |
| Open House Feedback | Same as "Showing Feedback." | |
| Pricing Reviews | Shows you are a good fiduciary and are committed to getting their home sold; keep them current, whether the news is good or bad. | |
| Marketing Activity Report | Again, shows you are doing what you said you would do to find a buyer. | |
| Service Survey | At the end, have a simple survey ready and make it easy for them to answer. | |
| Vendor Performance | Show your sellers you are on top of service by asking for their feedback on any vendors you supply during the listing. | |
| Personal Follow-Up | Get in touch with sellers about 90 days after the sale; get a referral. | |
| Touch Program | Keep your past sellers on a 33 Touch program. Shows you value a long-term relationship with them during the time between moves. | |

Listing Sales Representative Contract-to-Close Checklist

| Task | When | ✓ |
|--|--|---|
| Upon conditional sale, receive deposit cheque and obtain receipt | At execution of contract | |
| Deliver deposit cheque to your brokerage | Given to you by buyer's sales representative at execution of contract | |
| Coordinate inspections | Buyer sales representative will most likely schedule inspections, but you must maintain regular contact with them to ensure timings work for your seller | |
| Receive written confirmation on financing | Within conditional period | |
| Negotiate repairs | After inspections, use an amendment to request repairs. If there is a contingency period, this should be done before the dates in the contract. | |
| Schedule/provide survey (if necessary) | Within deadlines of contract | |
| Schedule appraisal (or ensure appraisal has been scheduled) | As soon as possible | |
| Receive your payment | After closing and funding | |

The Contract-to-Close Flow Chart



Contract-to-Close Issues

| Contract-to-Close Issues | How Things Go Wrong | Solutions |
|----------------------------------|-----------------------------------|--|
| Inspections and Repairs | 1. Surprise findings | Preinspect to avoid surprises |
| | 2. Report is complex or confusing | Attend inspection with your client and other party |
| | 3. Costs and "who pays" | Prenegotiate limits on inspection-related costs |
| | 4. Timetable for repairs | Select and supervise preferred vendors |
| | 5. Doubt about worthiness | Prepare and reassure your client about how things will happen, and document work in invoices |
| Appraisals | 6. Won't support price | Provide the appraiser with research |
| | 7. Won't support the loan | Find additional buyer funds or funding (provide seller financing option?) |
| | 8. Doesn't match the CMA | Appeal the appraisal |
| Loan Approval and Funding | 9. Application delays | Select loan originator and get preapproval |
| | 10. Documentation problems | Assist buyer with paperwork |
| | 11. Buyer credit issues | Get credit counseling for buyer |
| | 12. Lender failure to approve | Reapply with corrections |
| | 13. Lender failure to fund | Make parallel loan applications (recommend alternate lender) |
| | 14. Buyer credit changes | Give/Get a preclosing credit warning |
| | 15. Third-party approvals | Know who's involved and communicate |

(continued)

| Contract-to-Close Issues | How Things Go Wrong | Solutions |
|-----------------------------------|---------------------------------|--|
| Other Contingencies | 16. Sale of buyer's home | Take a backup offer |
| | 17. Take a backup offer | Know who's involved and communicate |
| | 18. Relocation/estate approvals | Know players, steps, and timetable |
| | 19. Clouded title | Read and understand preliminary title report |
| Co-Op Sales Representative | 20. Bad advice or communication | Always clarify messages and intentions |
| | 21. Inattention to detail | Own the process yourself and communicate |
| | 22. Poor vendor selection | Provide a vendor list and backup |
| Deadlines | 23. Inspections and repairs | Confirm all appointments and progress |
| | 24. Closing date | Build in buyer and seller flexibility |
| | 25. Occupancy | Preset dates, limits, and penalties |

Problem-Solving Guidelines

1. Focus on facts, not emotions—issues, not personalities.
2. Apologize for any error and validate their concern.
3. Own your statements personally—say “I,” not “we” or “they.”
4. Paraphrase the concern to make sure you have it right.
5. Ask multiple “whys” to get at the root cause of the issue.
6. Discuss a variety of possible solutions that speak to the root cause.
7. Once you have agreement on the solution, move fast to implement it.
8. Build any lessons learned into your business for the future.

Ways to Communicate

In order to exceed your expectations and make this a smooth and successful closing, I'd like to know your expectations of me and let you know what my expectations will be of you.

Name: _____ Property: _____

If you get my voicemail, please leave a message, letting me know the best time to reach you, and I will respond promptly.

Your Communication Expectations

1. During the day, what is the best way to contact you?
 Phone (Work / Home / Cell) Email Text
Appropriate number or email address:
2. If I need to call you at work, what days/hours do you work?
3. If I have to get your signature, what is the best way to handle it?
 Online e-signature Fax Come in to office
Fax number:
4. How often do you expect to hear from me?
 Only when there is news Weekly Other Explain: _____

My Expectations of You

1. Don't hesitate to call if you have any questions or concerns.
If I don't have the answer, I will find out or point you in the right direction to get it.
2. Timely return of phone calls, if any return information is required.
3. Timely return of all documents requiring signatures.

Please return this form immediately with any other requested paperwork in the envelope provided.

Client Satisfaction Survey

To:

From:

We worked together on a project of utmost importance to you—the sale of your home. Please help me serve you and your friends better by taking a few minutes to complete this survey. If you wish to talk to me directly, don't hesitate to call me at _____. For your convenience, I am enclosing an addressed and stamped envelope.

| Directions: Please rate your level of agreement with these statements: 1 = Strongly Disagree, 10 = Strongly Agree. | ☹ | | | | | ☺ | | | | |
|---|---|---|---|---|---|---|---|---|---|----|
| 1. I delivered on what I promised. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 2. I was accessible when you contacted me. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 3. I listened. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 4. You are willing to recommend me to others. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 5. You would use me again if you needed a real estate sales representative. | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 6. If you were in charge of my business, what's one thing you'd change? | | | | | | | | | | |
| | | | | | | | | | | |
| 7. What did I do well? | | | | | | | | | | |
| | | | | | | | | | | |
| 8. May I include your comments in my marketing materials? <input type="checkbox"/> Yes <input type="checkbox"/> No | | | | | | | | | | |

Thank you!

Checklist for Reviewing an Offer

- Address:** Be sure that the address is for the correct house!
- Price:** Check to see whether the offer falls in the range of the seller's expectations.
- Deposit Money:** Make sure the deposit money amount specified is acceptable to the seller.
- Time for Acceptance:** Aim for the shortest time possible, usually within 24 hours or less. Be sure to get the offer signed by your sellers within the time limit.
- Preapproval:** Verify that the buyer is preapproved by a lender.
- Loan Approval:** Be sure to have a specific date for formal and final loan approval.
- Closing and Possession Date:** Make sure the closing date on the offer will work with your seller's schedule.
- Home Warranty:** Review any home warranty considerations.
- Fixtures and Chatels:** Go through the appliances and fixtures requested by the buyer with the seller. Be sure all of them transfer.
- Repairs:** Review requested repairs with the seller.
- Special Clauses or Contingencies:** Carefully review any terms relating to closing costs, requests, etc.
- Mold Disclosure:** Make sure the seller has completed these documents. Have the seller sign or initial the documents where appropriate. Be sure to check that the buyer has initialed and signed in the appropriate places as well.