



7-step listing appointment checklist

The right set of steps can lay a solid foundation for an easy and successful listing appointment. Here's our 7-step checklist to help get you started.

1. Confirm the seller

The last thing you want is to walk into a listing appointment, only to find out that the person you're meeting doesn't actually have the power to sell the home. Confirming that the person you're meeting with is the rightful owner of the property can save both you and your prospective client valuable time and energy.

2. Get answers before you meet

While it's true that listing appointments provides the opportunity to ask some questions, to make the most of your time there are some things you should know beforehand. Before meeting, be able to answer the following questions:

- Have there been any recent repairs and updates to the property?
- Has square footage of the property changed since it was last sold?
- What does the homeowner believe their home is worth?
- What do they currently owe on the home?
- Are there any liens on the property?
- Why are they selling?
- When do they need to have their home listed?
- Who else will they be meeting with before making the decision to list?

3. Research other area listings



Familiarize yourself with the local market before your listing appointment. Preview other listings in the neighborhood to get an idea of what others are asking for and how they compare to your client's home.

4. Confirm HOA guidelines

If the seller's home is part of an HOA, now is the time to read the guidelines and learn what rules and restrictions the neighborhood has. Not only will this show the seller you've done your homework, but also ensure you have a full picture of the property throughout the selling process.

5. Do a comparative market analysis (CMA)

Presenting the seller with a comparative market analysis (CMA) shows that you're in their corner and ready to help them get the most money they can realistically get for their home. A CMA shows that you know what you're doing and are serious about working together, while also serving as a reality check for sellers who may have unrealistic expectations or an inflated asking price.

How many properties to include in your CMA is up to you, but most agents typically choose between 3 and 10. The more properties you include however, the more accurate your estimate. Just be sure that the properties you're using are true comparables for the seller's home.

6. Create an eye-catching and comprehensive listing presentation

Not only can a clean and eye-catching listing presentation help you organize your thoughts for the meeting, but it's also likely to help the seller better understand your sales process, the CMA, and your recommendations.



A visual presentation is also your chance to show off previous listings, [social media portfolios](#), and any professional real estate photography you have up your sleeve.

7. Paper copies of important documents

Though many things have become digitized, sometimes a hard copy is the easiest way to do business. It can be extremely beneficial to walk out of a listing appointment with a signed listing agreement – or simply sending a prospective client off with a copy of your listing agreement to serve as a reminder of your interest.

Bonus tip: send a thank you note/gift

Maya Angelou once said that people will forget what you said or did, but they will never forget how you made them feel. Ensure that those you meet with feel appreciated, even if you didn't land their business.

Positive word of mouth is a valuable commodity, and one which can be improved with just a bit of extra effort. Consider sending a short thank-you note or card for a final impression and to really show that you appreciated their time and consideration.

The bottom line: being prepared can make you the clear choice

Listing appointments aren't just a chance to make a lasting first impression on a prospective client, they're also an opportunity to build a new relationship, introduce yourself, display your knowledge, and hopefully walk away with a new client.