

There's a system for that!

What is a system- A set of principles or procedure according to which something is done-an organized scheme, method or plan.

Meet a new buyer prospect –Fill in buyer appt. Form or lead sheet. (color code form) keep on a clip board-

- Set up a buyer consultation (A buyer-show homes), (B & C buyer follow-up system)
- Assign a,b,c, buyer
- Put lead in eEdge
- Set up 8x8 & 33 touch

Showings – set up tour using showing time – use 3 ring binder to keep listings for buyer tour. Also offer to your clients for their showings.

Buyer wants to make an offer-see attached system

Keep all leads in a 3 ring binder-separate buyers/sellers

Meet a new seller prospect-use seller appt. Form or lead sheet - assign a,b,c seller-

- Schedule an appt.
- Put lead in eEdge
- Deliver a pre-list packet
- Set up 8x8 & 33 touch

Listing a Property for Sale

Create a loop for listing address

- 1) Bring in listing package with all documents needed for listing. Make sure you have a signed Seller Net Sheet in the loop.
- 2) Have all listing documents executed in person or electronically
- 3) Schedule photos/video photographer and Stager if necessary
- 4) Start entering listing in MLS
- 5) Create Feature Sheet/Flyer as a take away piece for showings (use eEdge marketing or toolkitcma.com.)
- 6) Create Home Book to leave at the property (stays with the property and becomes the possession of the buyer)
- 7) Ensure the listing is in Realtor.com etc.
- 8) Ensure listing is in showing time with showing instructions.

Submit listing for Review in loop

Executed Agreement of Sale System

1. Ensure the executed agreement and associated documents are shared in the loop with the buyer. Make sure you have a signed estimate of closing costs for the buyer.
2. Fill out Greensheet and submit loop for review. (Ensure deposit money has been delivered to Listing Agent)
3. Turn in file to Conveyancing - order Title (If using other title company other than 1st. Land Transfer then contact other title company and provide info. To them)
4. Fill out dates to remember document and email to buyer (use Contingency Inspection Checklist)
5. Email listing agent with pertinent dates to remember
6. Mail or email buyer a congrats letter and buyer's checklist
7. Make sure you have provided buyers with a list of vendors (Inspectors)
8. Order inspections (communicate the day & time with listing agent)
9. Ensure buyer makes mortgage application

From Sale to settlement document for seller is a system

1 week before settlement system

FOR SELLER – Make sure all documents that pertain to the sale are in the loop

Look in your mail folder –Lois Frederick (Conveyancer) will provide you with a file for settlement. The file contains a Title Company Instruction Sheet, the deposit check, a mortgage payoff, Tax Status report, sewer/trash payoff, domestic relations search, patriot act, copy of the title report. Lois has already emailed these documents to the Buyer's Title Co. This is an opportunity to make sure the title company and mortgage company have any change in terms addenda. (Price, seller assist, or change in settlement date).

1. Scan documents into computer and email to your seller. Set up a phone meeting with the sellers. Have your seller review for accuracy. Review with the seller all upcoming events:
2. Ensure the following:
 - a. Movers are coming the day before settlement. (Remind seller not to leave extra paint and other items unless we ask buyer's permission).
 - b. Utilities are scheduled for transfer as of the day of settlement
 - c. All agreed upon repairs are completed and repair invoices/reports are in the process of being emailed to you
 - d. Seller has received a settlement notice
 - e. If seller net sheet has changed since the time of the Agreement then update the seller net sheet and email to the seller as an update

FOR BUYER – Make sure all documents that pertain to the sale are in the loop. This is an

opportunity to make sure the title company and mortgage company have any change in terms addenda. (Price, seller assist, or change in settlement date).

1. Contact listing agent. Ensure they have a settlement notice. Schedule final walkthrough. Ensure all agreed upon repairs have been completed. Make sure you have all repair invoice/reports. Ask if seller is leaving paint etc. for buyer.
2. Run an updated estimate of closing costs for buyer. Give buyer the amount needed for settlement so they can be prepared to either obtain a bank check or wire. (Do not wait until the HUD or Closing Disclosure is ready).
3. Set up a phone appt. with the buyer. Review all upcoming events:
4. Make sure you have provided buyer with all repair invoice/reports.
5. Set up the time for the walkthrough
6. Movers are scheduled.
7. Utilities are set up in buyer's name as of the day of settlement.
8. Buyer has received a settlement notice.

Tools

seller appt. Form

buyer appt. Form

Bio

Buyer guide -use for buyer consult -create a buyer loop in buyers name

Pre-list/listing presentation - create listing loop in prop. Address-always include buyer agency contract in listing loop

3-ring binders

Agreement of Sale packet for car

Listing Contract packet for car

Open House Bag

Presentation folders

Listings to Leads (Provides a way to go to social media and craigs list, marketing flyers etc.)

Flyers/Feature Sheets

Settlement pouches

KW note cards

Comment cards

Surveys

Variety of valued Giveaways

Settlement gifts