Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Prop to List Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mailing

Client Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: Home\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Work\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

E-mail:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-Mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

LEAD TRACKER SOURCE

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **CCR** | **PCR** | **PC** | **PF** | **RLTR** | **AD** | **BUS** | **A/R** | **BLDR** |
| CURRENT CLIENT REFERRAL | PREVIOUS CLIENT REFERRAL | PREVIOUS CLIENT | PERSONAL FRIEND | REALTOR | SIGN, INTERNET, MAILINGS | BUSINESS REFERRAL | ANNUAL REVIEW | BUILDER |
|  |  |  |  |  |  |  |  |  |

Referral or Relocation \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Subdivision/Area\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Office Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-Mail \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**PRE LISTING CHECKLIST**

\_\_\_\_ Lead Tracker \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Month)

\_\_\_\_ Prelisting Call #1\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Date)

\_\_\_\_ Enter into Database

\_\_\_\_ Prelisting Package: Mail\_\_\_\_\_\_\_\_\_\_\_ Delivery\_\_\_\_\_\_\_\_\_\_\_ Emailed\_\_\_\_\_\_\_\_\_\_\_ Pick Up\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_ Prelisting Call #2\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Date)

\_\_\_\_ Post Listing Call #3\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Date)

\_\_\_\_ Thank You Letter to Referring Person\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Date)

\_\_\_\_ Copy of Grid Map for File with Street Highlighted

\_\_\_\_ Appointment Set for: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_ Time: \_\_\_\_\_\_\_

\_\_\_\_ All Parties Present: Yes\_\_\_\_\_ No\_\_\_\_\_

\_\_\_\_ Print CRM Contact Management Info Report

\_\_\_\_ Print Tax Roll

\_\_\_\_ Print MLS Property History

\_\_\_\_ Print MLS Subject Property if listed previously or same street

\_\_\_\_ Print MLS Active, Pending, and Sold Comparables

\_\_\_\_ Print Net Sheets

\_\_\_\_ Print Listing Agreement

\_\_\_\_ Print Seller’s Disclosure

\_\_\_\_\_ Print Amendment to Listing

\_\_\_\_ Print Brokerage Service Information:

\_\_\_\_ Print Lead Paint, Septic, Survey, HOA, Buyer Rep

\_\_\_\_ Print ERC Broker’s Market Analysis Relocation Forms

\_\_\_\_ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Customer Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

After Appointment

\_\_\_\_ Honor Call after the appointment

\_\_\_\_ Staff Call the next day

\_\_\_\_ 3-5 Changes recommended by agent sent to seller

\_\_\_\_ Thank You Note to seller

\_\_\_\_ Staging Recommended