

# REAL ESTATE FAST TRACK

## Seller Transaction and Relationship Timeline

When	Action	Done?
First Contact	Qualification Dialogue. OWN THE OPENING by <i>immediately</i> offering value. Ask open-ended questions and dig deep to get to the WHY of their move. SET Review Appointment and home tour	
Immediately after first contact	<ol style="list-style-type: none"> <li>1) Video (SMS or email) OR handwritten note – agent choice. Reiterate key points, say “thank you” for the opportunity to serve.</li> <li>2) Send Buyer or Seller Item of Value (physical) and Client Appreciation Program Flyer</li> <li>3) Add to Follow Up Boss (COMPLETE ENTRIES)</li> </ol>	
Tour and Review	Ask buyer to show you around the home like theyre showing it off. Ask permission to take notes. Ask about upgrades, repairs, defects. Bring BLANK ERTS and disclosures, discuss, and leave for seller review. Set appointment for signing. Thank and send Hand Written Note or Video THANKING for the tour and the opportunity to serve. Reiterate your enthusiasm to represent home on the marketplace and value proposition.	
Signing appointment	<ol style="list-style-type: none"> <li>1) Thank for the opportunity</li> <li>2) Do they have any questions</li> <li>3) Sign required docs</li> </ol>	
You got an offer!	<ol style="list-style-type: none"> <li>1) Call client and let them know! Be excited!</li> <li>2) Record video explaining next steps and what to expect.</li> <li>3) Sent a congratulations note.</li> <li>4) Lisa will prep and email contingency deadlines letter.</li> </ol>	
Acceptance +2 days	Deliver moving kit to client’s home (contains 5 boxes, 2 sharpies, a roll of tape, and a USPS change of address kit). Offer any assistance they may need – packing help, PODS discount. Seek to serve!	
Inspections	Confirm two days before and explain the process. Confirm again morning of.	
NORR Negotiations Over	Note: Thank you for trusting me to negotiate on your behalf! I think we did fairly well and kept the end goal in mind – closing!	
appraisal	Confirm 2 days before and morning of. Send \$5 coffee card to client with note – “We’re past the last major hurdle – a jolt of caffeine should help us push through to a strong finish! !” After negotiations. ASK FOR REFERRAL if you have not received them.	
5 days before COE	<ol style="list-style-type: none"> <li>1) Call and confirm walkthrough, signing. Offer any assistance they may need and do it.</li> </ol>	
Signing	Attend signing, reconfirm move-out, and deliver Closing Gift. Make sure property is ready to transfer. Take photo of clients outside home with SOLD sign and send to them for social media with their permission. DO NOT POST without permission.	
Move-out Day	Deliver late lunch – pizza, Port of Subs, something else you think your client will like.	

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Move-out + 7	Check in call: How is everything going? Ask if they need referrals to a service provider, remind about HW, ask for review	
Move-in + 30	Video (Email or SMS) or handwritten note: Hope everything is going great! Double check that everything works, is as expected, offer a referral to service provider, ask for a referral	
COE + 1 yr	Take your clients out to dinner, or if they've moved away, send them a decent gift card to a highly rated restaurant in their city.	
After	Holiday cards, merry pop-ins, Client Appreciation Party invites, anniversary cards, Home anniversary gift, Market insights, e-report, birthday cards, life events, referrals.	