The Listing Process

Guide a seller from the first conversation through closing and a continuing relationship. A well-managed listing combines careful preparation, clear explanations, accurate records, sound market analysis, and timely communication. Each step should help the seller understand the choices in front of them.

At List n Show, you manage the seller relationship, counseling, pricing discussions, marketing strategy, offers, negotiation, contracts, and disclosures within your professional role. Transaction Coordination, or TC, supports file administration, deadlines, documentation, participant coordination, and closing preparation. The broker provides oversight and direction on escalated issues.

How to use this guide

Read the sections in sequence. Complete the practice activities in a notebook using a hypothetical listing or an authorized training file. Compare your answers with the self-checks. Use the final readiness plan and worksheet before working through a listing with company support.

Form numbers identify the company documents named in the training material. Use current company-approved forms and the applicable transaction checklist. Requirements depend on the property and circumstances; ask the broker about applicability, legal interpretation, or unusual terms. The examples illustrate a process rather than determine legal rights in a particular transaction.

Your route through the guide

1 Prepare for the seller consultation

2 Explain agency and seller responsibilities

3 Develop a pricing strategy with a CMA

4 Explain the listing agreement and disclosures

5 Complete property forms and establish the file

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9 Guide the seller from contract to closing

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Your first listing readiness plan

Worksheets and readiness review

The result to work toward

The seller knows what happens next, understands the options, and receives consistent guidance from one coordinated team. You can explain the next action, the responsible person, the supporting document, and any issue that needs broker direction.

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1 Prepare for the seller consultation

A listing opportunity starts with understanding the homeowner. The first meeting should help both of you determine goals, readiness, concerns, and whether the company is a suitable fit. Preparation improves your advice; listening tells you which advice is relevant.

Develop opportunities through several sources

Seller opportunities may come from your sphere of influence, past clients, professional referrals, neighborhood activity, open houses, expired or cancelled listings, website inquiries, and broker-sponsored leads. Record the source in your CRM and schedule follow-up. Follow the company's approved outreach practices and respect existing representation.

Research before the appointment

- Property: MLS history, tax records, ownership history, prior sales, assessments, size, and relevant physical characteristics.
- Market: comparable sales, active competition, pending listings, inventory, days on market, and market absorption.
- Area: amenities, businesses, public information about schools, and confirmed or proposed developments. Distinguish verified information from assumptions.

Prepare questions about information that needs confirmation. Records can conflict, and an online figure is not automatically correct. Avoid presenting an unverified measurement, improvement, or property characteristic as established fact.

Learn what success means to the seller

Ask why they are considering selling, when they hope to move, where they plan to go, and what concerns them most. Discuss prior selling experience, price expectations, completed improvements, and occupancy. A seller with tenants, an estate, or an uncertain moving plan may need a different preparation process.

Begin the consultation with the required agency explanation and disclosures before detailed pricing, marketing, compensation, and agreement discussions, as the company procedure directs. Then explain the overall route through preparation, marketing, showings, offers, inspections, and closing.

Set realistic expectations

Agree on how you will communicate and how decisions will be made. Explain that sale price, marketing time, appraisal, inspections, financing, and buyer performance cannot be guaranteed. You can commit to diligent work, honest advice, and communication. Sometimes the useful recommendation is to resolve an issue or delay listing.

Put it into practice

Prepare six seller questions and a research checklist for a hypothetical home. Identify two facts to verify and one circumstance that could affect the timeline. Write a brief outline for the first meeting, beginning with agency and disclosures.

Check your understanding

The seller wants a quick sale, but their next move is uncertain. Should you promise a short closing?

Suggested answer: No. Clarify the timing conflict and explain options and risks. Build a plan around their actual needs without guaranteeing an outcome.

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2 Explain agency and seller responsibilities

Agency explains who represents whom, the services provided, and the duties involved. List n Show's procedure calls for explaining agency and providing required disclosures early, before discussing pricing, marketing, commission, and listing agreements. A signature should follow an explanation, not replace it.

Explain your role in plain language

The company identifies these general seller-agent duties: loyalty to the seller's interests, obedience to lawful instructions, confidentiality, disclosure of known material facts, reasonable care and diligence, and accounting for entrusted money or property. Apply the actual agency arrangement and company guidance; ask the broker about conflicts or limits.

You might explain: "My role is to help you understand the market and your options, protect confidential information, and carry out lawful instructions within our agreement. You make the decisions, and I explain the process and recommendations." Do not describe a relationship as established merely because an informal conversation occurred.

Review the initial disclosures

- Real Estate Disclosure Notice [501]: review representation options, agency concepts, and consumer rights. Answer questions, obtain required signatures, and upload the completed document to RBO.
- Fair Housing Notice [401]: explain the company's commitment to equal housing opportunity and compliance with federal and Connecticut requirements and company policy. Avoid discriminatory language, steering, selective marketing, and preferences based on protected characteristics.
- Broker Commission Advisory [402]: explain compensation arrangements, services, seller choices, negotiability, and broker cooperation or cooperative compensation when applicable.

The company states that commissions are negotiable. Use the approved advisory and agreement to explain the actual arrangement; do not imply a standard rate or assume the seller understands how compensation works. Direct unresolved terms or policy questions to the broker.

Explain what the seller must contribute

Discuss truthful information about ownership, condition, improvements, defects, and occupancy; applicable disclosures; reasonable showing access; timely documents; and communication. Explain why complete information matters. Do not minimize a concern to keep the listing moving.

Recognize the limits of your advice

Do not provide legal, tax, engineering, or structural opinions. Refer specialized questions to the broker and appropriate attorneys, accountants, engineers, inspectors, or other qualified professionals. Document important explanations and unresolved questions.

Put it into practice

Practice a brief explanation of representation, confidentiality, seller decisions, and compensation. Then write how you would respond if the seller asks whether a visible crack proves a structural defect.

Check your understanding

Can TC take over explaining agency because TC checks the documents?

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Suggested answer: No. You remain responsible for explaining agency and disclosures. TC supports organization and completeness; the broker provides direction on questions beyond your role.

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3 Develop a pricing strategy with a CMA

A comparative market analysis, or CMA, supports a pricing discussion with market evidence. It is a professional opinion based on available information. It is not an appraisal, a guaranteed value, or a prediction of the final sale price.

Choose comparable properties thoughtfully

Consider location, property type, size, bedrooms, bathrooms, lot size, age, condition, renovations, garage, basement, waterfront, and other meaningful features. Explain why each property is relevant, where it differs, and why an adjustment may be appropriate. Do not invent adjustments simply to reach a preferred price.

Use each type of evidence for its purpose

- Recent sales show what buyers actually paid and provide evidence of completed transactions.
- Pending listings show current buyer activity, although final prices may not yet be known.
- Active listings show the alternatives available to buyers. Asking prices are not completed sale prices.
- Expired listings may help you examine unsuccessful positioning or changing conditions. Do not assume price alone explains every unsuccessful listing.

Connect the evidence to current conditions

Discuss inventory, buyer activity, days on market, and competing properties. A low-inventory market may behave differently from one with many comparable homes available. Account for the property's characteristics and the seller's timing rather than applying one strategy universally.

Use a supported range and explain uncertainty: "Based on recent comparable sales and current competition, the evidence appears to support this range. Here is how I would position the home and what we would monitor." Keep the seller's financial needs separate from evidence of what buyers may pay.

Explain the tradeoffs

A higher asking price may reduce activity, extend marketing time, and lead to later reductions. Pricing below a supported range may stimulate competition in some circumstances but can also risk an unsatisfactory outcome. Explain advantages, disadvantages, and uncertainty; the seller chooses the strategy within the company's process.

Plan for a review after launch

Discuss how you will evaluate showing activity, feedback, new sales, competing inventory, and market changes. A price adjustment should be a considered response to evidence, not a reaction to one isolated comment. Explain your recommendation and document the seller's decision.

Put it into practice

Choose three potential comparables for a training property. For each, identify its status, similarities, differences, and information you still need. Prepare a short pricing explanation and a plan for reviewing activity after launch.

Check your understanding

A nearby active listing is priced much higher. Does that establish your seller's value?

Suggested answer: No. It is an asking price and a competing option. Compare completed sales, pending activity, property differences, and current conditions before recommending a strategy.

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4 Explain the listing agreement and disclosures

After the agency discussion, required disclosures, and pricing strategy, formalize the relationship using approved listing documents. Explain what each document does, what decisions it records, and what the seller is being asked to acknowledge or authorize.

Review Listing Agreement 408

The Listing Agreement [408] establishes the contractual relationship between the seller and the company. Review the parties, property, listing term, price, compensation, agency, marketing authority, broker cooperation, seller obligations, and additional terms. Verify the information rather than copying details without checking them.

Discuss beginning and expiration dates, services, showing access, marketing methods, and compensation negotiability. Explain applicable cancellation provisions using the approved document, and ask the broker about interpretation rather than inventing a general cancellation right. Give the seller time for questions.

Use the property disclosure forms appropriately

Property Condition Report [403] records the seller's known information about the property, such as systems, utilities, condition concerns, water intrusion, environmental issues, and improvements. The seller completes it. You can explain its purpose and general instructions; do not guess, supply answers for the seller, pressure them, or minimize concerns.

For Lead Paint Disclosure [405], the company identifies pre-1978 residential construction as a key applicability issue. Use the current approved process to determine applicability and address known information, available reports, required materials, signatures, and delivery. Refer specific legal obligations or exceptions to the broker or legal counsel.

Concrete Advisory [407] addresses concrete-related concerns for applicable Connecticut properties. Explain the advisory and encourage disclosure of known information. Do not diagnose a foundation or provide engineering opinions. Obtain broker direction and recommend qualified evaluation when appropriate.

Make inclusions and exclusions specific

Use Items Included & Excluded [409] to clarify items such as appliances, light fixtures, window treatments, mirrors, shelving, television mounts, and outdoor structures. Written specificity reduces assumptions. Make sure the seller's intended treatment is reflected consistently in marketing and later contract discussions.

Confirm other property requirements

The company also identifies Multi-Family Statement [410] and Vacant Land Statement [420]. Additional documents may depend on condominiums, new construction, commercial use, wells, septic systems, environmental concerns, easements, historic designations, estates, trusts, divorce, or corporate ownership. Use the applicable checklist and ask the broker early.

Put it into practice

Build a form list for a hypothetical older single-family property. Mark what you know applies, what needs confirmation, and which questions require broker or specialist input. Explain why the seller must complete the condition report.

Check your understanding

The seller is unsure whether a repair solved an old water problem. Should you choose a reassuring answer for them?

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Suggested answer: No. Do not guess or complete the disclosure for the seller. Explain the process, encourage accurate known information, and seek appropriate direction.

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5 Complete property forms and establish the file

Marketing permissions and property access deserve the same careful explanation as pricing and compensation. Confirm what the seller authorizes, complete the documents, and establish the official RBO file promptly rather than waiting for an offer.

Explain photography authorization

Photography Authorization [421] addresses the use of property images in marketing. Discuss where photographs may appear, including the MLS, websites, portals, social media, and marketing materials. Address preparation, privacy, access, and the document's rights or limitations before photography occurs.

Discuss open houses as a choice

Open House Notice [432] supports a discussion of exposure, traffic, public access, privacy, and security. The company describes open houses as optional; the seller should participate knowingly and voluntarily. Do not assume a signed listing agreement settles every open house decision.

Address recording devices before access

Audio-Video Recording Disclosure [430] concerns cameras, doorbells, security systems, and audio recording devices. Discuss the property's devices and the required disclosure process. Refer legal questions about recording, privacy, or visitor notification to the broker rather than giving an unsupported assurance.

Apply the document quality checks

- Complete: every required page and attachment is present.
- Legible: pages are readable, correctly oriented, and free of cut-off text.
- Accurate: names, property details, dates, price, and financial information are consistent.
- Executed: required signatures, initials, and dates are present. Identify and resolve incomplete items rather than treating them as finished.

Create the official listing record promptly

After execution of the listing agreement, create and maintain the listing transaction in RBO through the company workflow. Upload the agreement, required disclosures, property documents, marketing authorizations, and supporting material promptly. Do not rely on separate unofficial folders or wait until an offer arrives.

Review the uploaded copies, keep details current, and respond to deficiency notices. TC supports file organization, completeness review, administrative coordination, and deadlines. You remain responsible for explanation, accuracy, signatures, and seller counseling.

Put it into practice

Write a pre-launch file checklist covering the executed agreement, applicable disclosures, marketing permissions, property details, and unresolved items. Draft a short message to TC identifying what is ready and what still needs attention.

Check your understanding

The photography is scheduled, but the seller has unanswered questions about image use. Should you leave those questions until afterward?

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Suggested answer: No. Address the authorization and privacy questions before photography, using the approved form and broker guidance as needed.

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6 Market the listing and manage showings

Begin marketing after the agreement, required disclosures, and transaction setup are in place. Your role includes strategy, MLS content, seller communication, access, feedback, and adjustments. TC supports the file and administration; you manage the seller's experience.

Prepare and present the property

Discuss cleaning, decluttering, minor repairs, safety concerns, deferred maintenance, and curb appeal. Recommend improvements without pressuring the seller; they decide what work to undertake. Coordinate photography, preparation, and access according to the seller's authorizations.

Verify marketing facts

Check property details, room counts, measurements, taxes, school information, features, remarks, and disclosures. Write accurate, professional descriptions that highlight verifiable features and improvements. Avoid exaggerated or discriminatory language and claims you cannot substantiate. Describe the property rather than the type of person who should buy it.

Review online photographs, descriptions, and syndicated information periodically for accuracy. Coordinate signs with company standards, seller preferences, and applicable local requirements, including installation and removal. Correct discovered errors promptly.

Agree on showing arrangements

Discuss notice, appointment windows, restricted times, lockbox procedures, occupancy, pets, security, and special instructions. Explain what the seller should do to prepare and whom to contact when access changes. Confirm the agreed arrangements and keep participants informed.

Communicate even during quiet periods

Agree on a regular update schedule and channel. Discuss showing activity, buyer feedback, marketing performance, new competition, and market changes. If nothing material has changed, provide a brief factual update rather than disappearing. Avoid implying work occurred unless it did.

Example: "We had three showings this week. Two visitors commented on the kitchen condition. I am reviewing that feedback alongside new competition and recent sales. Let's discuss whether any change to presentation or price would support your goal." Use actual facts and distinguish comments from conclusions.

Adjust the plan using evidence

Days on market reflect price, competition, inventory, property characteristics, and other conditions. Look for feedback patterns rather than reacting to every comment. Discuss whether new photography, a different approach, an optional open house, or a price adjustment is warranted. Obtain and document the seller's decisions through the appropriate process.

Put it into practice

Prepare a launch checklist and a sample weekly seller update. Include verified marketing facts, showing arrangements, the agreed update day, the information you will monitor, and how you will propose a change.

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Check your understanding

One visitor dislikes the layout. Must you recommend an immediate price reduction?

Suggested answer: No. Review patterns, showing activity, comparable sales, competing inventory, and seller goals before recommending a change.

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7 Present offers and negotiate

Review offers promptly and present them objectively without unnecessary delay. Your role is to explain terms, risks, strengths, weaknesses, and alternatives. The seller decides. TC supports records and coordination; negotiation and seller counseling remain with you.

Check the complete offer

Review signatures, dates, price, deposits and due dates, financing, contingencies, riders, closing and possession, and included or excluded personal property. Clarify incomplete information promptly without using it as a reason for unnecessary presentation delays. Explain the entire proposal rather than only the headline price.

Compare terms against the seller goals

Consider financing and supporting information, inspection and mortgage terms, appraisal provisions, other contingencies, timing, and practical ability to perform. A higher price can involve different risks or timing than a lower offer. Base comparisons on objective transaction terms and documented information.

Hypothetical example: Offer A is higher but includes a home-sale contingency and a closing date the seller cannot readily accommodate. Offer B is lower with a different financing structure and suitable timing. Identify the tradeoffs and questions to resolve. Do not declare either one automatically superior.

Handle multiple offers with broker guidance

Notify the seller promptly and explain strategies permitted by company policy, MLS rules, and applicable law. The company discusses accepting an offer, requesting highest and best terms, countering one, or countering more than one if permitted. Do not improvise simultaneous counteroffers or assume the seller can accept incompatible commitments. Obtain broker direction on the process.

Review every counteroffer carefully

Changes can involve price, deposits, closing, possession, repairs, credits, personal property, and contingencies. Review all terms after each change and confirm the seller's instructions. Use approved documents and communication procedures. Ask the broker about legal effect or unusual language.

For an escalation clause, identify the trigger, maximum price, proof requirements, and confidentiality concerns. Refer questions about legality, ethics, and company policy to the broker before advising the seller on how to proceed.

Remain calm and document decisions

Treat cooperating agents, buyers, lenders, and attorneys professionally. Explain options and risks without making guarantees or reacting defensively. Keep records of offers, seller instructions, material communications, and agreed changes in the official file.

Put it into practice

Create a comparison of two hypothetical offers using price, financing, deposits, contingencies, timing, possession, and open questions. Write a recommendation that explains the tradeoff while leaving the decision with the seller.

Check your understanding

Can the seller's preferred price justify ignoring the other terms?

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Suggested answer: No. Explain the complete offer and its risks. The seller's decision should reflect the full proposal and their goals.

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8 Verify execution and hand off to TC

An accepted offer moves the work toward contract execution and coordination. Confirm the executed documents and communicate the transaction clearly. A listing file should already exist; update it promptly rather than treating the contract stage as the first point for recordkeeping.

Verify the contract package

The company describes full execution generally as all parties signing, completed dates, attached riders, and communicated acceptance. Verify the actual transaction documents and company procedure. If effectiveness, timing, or interpretation is uncertain, obtain broker direction rather than making a legal conclusion.

- Purchase agreement: required signatures and dates, correct price, clear deposits, and complete contingencies.
- Riders and addenda: applicable inspection, financing, property-specific terms, additional disclosures, and amendments.
- Agency documents: required disclosures, consents, and company forms.

Update RBO as the official record

Verify property information, transaction type, status, and contract dates. Confirm buyer, seller, attorney, lender, cooperating agent, and other participant information. Check purchase price, commission entries, referral fees, company fees, and applicable charges against the records. Upload the executed contract, riders, amendments, agency documents, and required disclosures.

Notify TC promptly

Communicate acceptance, deposit deadlines, inspection dates, mortgage contingency, applicable appraisal deadlines, and closing date. Provide participant contacts and flag special circumstances, such as occupancy arrangements, estates, unusual contingencies, construction concerns, or title questions.

A useful handoff identifies the property, file location, verified documents, deadlines, participants, open items, responsible person, and issues already referred to the broker. Do not calculate uncertain contractual deadlines by guesswork; resolve the question with appropriate support.

Explain the partnership to the seller

You might say: “Our transaction coordinator helps organize documents, track milestones, and coordinate information. I will continue advising you, discussing decisions, negotiating issues, and keeping you informed.” Confirm how the seller should communicate with the team and when you will next update them.

Check the handoff for unresolved work

Confirm the next actions and who is handling them. Identify missing documents, unanswered questions, and approaching dates. Handoff does not mean you stop reviewing deadlines or seller concerns. Follow up on important items until the responsible person and status are clear.

Put it into practice

Draft a handoff for a hypothetical executed sale contract. Include the supporting documents, key dates, participant contacts, one open item, and the seller’s next scheduled update. Mark any uncertain term for broker review.

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Check your understanding

Does notifying TC transfer the client relationship and negotiation responsibility?

Suggested answer: No. TC manages administrative support and coordination. You continue seller counseling, communication, negotiation, and representation.

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9 Guide the seller from contract to closing

After execution, sellers still need guidance as inspections, financing, appraisal, amendments, and closing arrangements develop. Continue reviewing status and explaining choices. TC organizes information and tracks milestones, while the broker directs escalated risk or interpretation issues.

Handle inspections and amendments

Explain the buyer's requests, relevant timing, possible responses, and negotiation options within your role. Requests may involve repairs, credits, price changes, or further inspection. The available options depend on the contract; do not promise the seller can refuse without consequences or guarantee a particular outcome.

You handle the negotiation and use approved processes for amendments. Seek broker or legal direction for interpretation or drafting beyond your authority. TC can support uploads, document organization, and deadline tracking after changes are agreed.

Monitor financing and appraisal developments

Review mortgage contingency dates, commitment information, and communications with TC. Discuss risk, extensions, or contract interpretation with the broker. A delayed financing milestone deserves prompt attention rather than an assumption that an extension will occur.

A low appraisal may lead to discussions about price, additional buyer funds, renegotiation, reconsideration, or other contract-dependent options. Explain the facts, uncertainty, and need for appropriate direction. Do not guarantee an appraisal change, loan approval, or a right to terminate.

Communicate changes to the whole file

Notify TC promptly about extensions, repairs, credits, price changes, occupancy agreements, inspections, commitments, appraisals, delays, and rescheduled closings. Upload supporting documents, update affected details and tasks through the company workflow, and record meaningful activity. An email alone may not update the official record.

Prepare the seller for closing

Discuss moving, possession, utilities, final walkthrough, expected closing arrangements, and outstanding questions. Coordinate with TC and closing professionals about document requests and scheduling. Keep promises about what you will do separate from matters controlled by other participants.

Escalate problems promptly

Notify the broker about legal or ethical issues, threatened litigation, serious client complaints, financing failure, title concerns, earnest money disputes, contract disputes, and unusual circumstances. Keep TC informed of coordination needs. Early escalation gives the team time to respond appropriately.

Put it into practice

A buyer requests an inspection credit and the closing may move. List the seller discussion, negotiation, documentation, date verification, TC notification, and possible broker questions. Identify which actions cannot be completed until terms are agreed.

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Check your understanding

A buyer's appraisal is below contract price. Can you promise the seller that the buyer must cover the difference?

Suggested answer: No. Review the actual terms and circumstances with broker support. Explain available options without guaranteeing rights or outcomes.

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10 Continue the relationship after closing

Closing completes an important transaction and often a major life transition. Stay involved through the final stage when practical, then follow up in a way that fits the client's new circumstances. A seller who has moved away may need different information from a buyer who remains in the home.

Confirm the closing experience

Contact the seller before and shortly after closing, attend when appropriate and practical, and confirm that remaining questions have been addressed. Thank them for their trust. Route unresolved matters to the right team member or professional rather than treating closing as a reason to stop responding.

A simple message might be: "Thank you for trusting me with your sale. I hope your move is going smoothly. Is there any remaining question you need help directing to the right person?" Adapt it to the actual circumstances and avoid assuming the transition is easy or celebratory.

Ask for useful feedback

Ask whether communication was clear, the process was explained, expectations were met, and anything could improve. Listen without becoming defensive. Record a service improvement you can make. If feedback reveals an unresolved complaint or risk issue, involve the broker promptly.

Invite reviews and introductions without pressure

You may ask for an honest review of the experience and make your availability for future introductions clear. Keep requests appreciative and optional. A client should not feel that an expression of gratitude creates an obligation to provide business.

Example: "If you would like to share your experience in a review, I'd appreciate it. And if someone you know needs real estate guidance, please feel free to introduce us." Follow company practices for review requests and use language that matches the relationship.

Make future contact relevant

Update the CRM with the closing, current contact details, preferences, and the next useful check-in. Consider milestones, helpful market information, homeownership resources, community news, or client appreciation invitations when relevant. A home anniversary message belongs to the client's actual situation; do not congratulate a former seller on another year in a home they sold.

Simple appreciation can include a note, coffee gathering, charity event, food drive, or educational resource. Keep future communications welcome and useful. People may return as buyers, sellers, investors, or referral sources, but continuing care is not a guarantee of future business.

Put it into practice

Write a post-closing thank-you, three feedback questions, and a follow-up plan for a seller who relocated. Choose one specific lesson from the transaction to apply to the next listing.

Check your understanding

Should a former seller automatically receive updates about the property they sold?

Suggested answer: No. Ask what information is useful now and respect their preferences. Match the follow-up to their current circumstances.

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The Listing Process

Your first listing readiness plan

Use this practice sequence to prepare before taking responsibility for a listing. It does not delay any actual file, disclosure, client, or deadline obligation. Work in a notebook or approved training setting and ask for company support where needed.

Step 1 Prepare and practice the consultation

Research a training property, note uncertain facts, and prepare seller discovery questions. Practice the agency and disclosure discussion before moving to pricing and marketing. Explain the seller's responsibilities and your limits when specialist advice is needed.

Ready when: you can outline the process, identify unanswered questions, and explain how the seller makes informed decisions.

Step 2 Build and explain the pricing analysis

Select comparable sales, pending activity, active competition, and relevant expired listings. Explain similarities, differences, market conditions, and the limits of your opinion. Prepare for a seller whose expectations differ from the evidence.

Ready when: your recommendation has a traceable basis, acknowledges uncertainty, and includes an activity review plan.

Step 3 Review forms and launch preparation

Walk through the approved listing agreement and applicable disclosures. Practice verifying signatures, pages, dates, inclusions and exclusions, marketing permissions, and property information. Map the RBO setup and TC support process. Prepare an accurate marketing and showing plan.

Ready when: you know what must be complete, what the seller authorizes, and which requirements still need broker confirmation.

Step 4 Practice offers and the contract handoff

Compare two hypothetical offers, outline a permitted negotiation process, and identify escalation questions. Review a training contract package, verify dates and participants, and draft a concise TC handoff. Explain your continuing role after execution.

Ready when: you can identify the next action, responsible person, document, and unresolved question at each transition.

Step 5 Plan continuing client care

Prepare a regular seller update, an inspection issue discussion outline, closing preparation questions, and a post-closing check-in. Schedule recurring file reviews and client communication. Keep the plan current as the transaction changes.

Before using the process on a live listing

Confirm current company forms, property-specific requirements, RBO procedures, available TC support, and the broker contact for escalation. Resolve uncertainties about representation, unusual ownership, recording, compensation, contract terms, or legal rights through the appropriate company process.

A useful readiness test is whether you can explain why each step matters to the seller, not merely name the form or task. If an explanation remains unclear, resolve it before relying on it with a client.

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The Listing Process

Worksheets and readiness review

Use these prompts alongside the company checklist and official RBO record. Record agreed actions and important decisions in the appropriate company system.

Seller consultation notes

Goals motivation timing and occupancy: _____

Price expectations concerns and improvements: _____

Agency and required disclosures reviewed: _____

Facts to verify and questions to escalate: _____

Next action responsible person and date: _____

Listing launch and contract review

CMA evidence and seller pricing decision: _____

Agreement and applicable forms completed: _____

Inclusions exclusions and marketing permissions: _____

RBO setup and document checks completed: _____

Showing arrangements and seller update schedule: _____

Offer terms and seller instructions documented: _____

Executed package key dates and participants verified: _____

TC notified open items assigned and broker questions raised: _____

Readiness scenarios

1. The seller asks you to complete unknown condition answers.
Explain the form and encourage accurate disclosure; do not guess or complete the seller's answers. Obtain appropriate direction for unresolved issues.

2. The highest offer has timing the seller cannot accommodate.
Explain all terms, compare tradeoffs with other options, and let the seller decide. Seek broker direction for unusual terms or multiple-offer procedures.

3. A closing extension is discussed but not documented.
Do not assume the date has changed. Follow the approved agreement process, verify supporting documents and dates, update the file, and notify TC.

4. A seller complains that no one has explained an inspection request.
Take responsibility for the seller discussion, explain options within your role, coordinate the next steps, and escalate significant issues to the broker.

Your next commitment

One skill I will practice before my next consultation: _____
One company procedure I will confirm: _____
My next file and seller communication review: _____

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