Listing Appointment Prep Checklist

Work through this before you walk in, so the meeting is about the seller's goals and a clear plan.

SELLER NAME(S) _____ APPOINTMENT DATE _____ PROPERTY ADDRESS _____

1. Before the appointment

- [ ] Pull recent sold, pending and active comparables for the neighborhood
- [ ] Review the property's tax records, lot, beds, baths and year built
- [ ] Note any permits, additions or HOA details you need to verify
- [ ] Drive the street and note first impressions and curb appeal
- [ ] Prepare your listing presentation, marketing plan and a sample timeline
- [ ] Bring your listing agreement and required disclosures to review
- [ ] Confirm who will attend, and send a short agenda ahead of time

2. Questions to ask the seller

Why are you selling, and what does success look like? _____

Ideal move date, and is it flexible? _____

What do you still owe, and what do you need to net? _____

What repairs or updates have you already considered? _____

Anything about the home or neighborhood I should know? _____

3. During the walk-through

- [ ] Take notes and photos of strengths and items to fix before photos
- [ ] Ask about recent updates, known issues and what is included in the sale
- [ ] Explain how you will price from comparable sales, then confirm next steps

Marketing form, not legal or financial advice. Use your brokerage's required forms and follow fair housing and your state's agency rules.

After the Appointment: Next Steps

Keep the momentum, whether or not you got the listing today.

Within 24 hours

- [ ] Send a thank-you note that recaps their goals and your proposed plan
- [ ] Email the presentation or pre-listing packet as a PDF
- [ ] Answer any open questions in writing
- [ ] Share the comparable sales you used and how you read them
- [ ] Calendar a follow-up call and add them to your CRM

If they sign

- [ ] Review the listing agreement and disclosures together
- [ ] Schedule photos and a prep walk-through
- [ ] Agree on a showing and communication routine
- [ ] Set a go-live date and a date to review feedback

If they are not ready

- [ ] Ask what would make them ready, and note it
- [ ] Set a check-in date (30 or 60 days) and keep it
- [ ] Send one useful market update, not a sales pitch

Fair housing reminder

Give every seller the same quality of service and information. Base advice on the property, the market and their goals. Do not make assumptions about buyers based on protected classes.

Notes

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