

AGENT FIELD GUIDE

DRAFT **TO** DOORSTEP

Premium Client *Communication Kit*

Elevate the client experience with professional email templates and status updates designed for white-glove transaction standards.

Precision from Contract to Closing

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1 The White-Glove Standard

Clients don't remember every disclosure they signed — they remember how it felt to be kept informed. A premium experience is built on five habits, applied consistently across every file.

- **Proactive, not reactive:** the client should never have to ask "what's happening?" — you've already told them.
- **Plain language:** translate contingencies, contingency removals, and lender jargon into what it actually means for them.
- **Fast response windows:** acknowledge same-business-day, resolve or update within 24 hours.
- **Personal specificity:** reference their address, their timeline, their kids' school start date — never a generic form letter.
- **Consistent branding:** every email, text, and call sounds like it comes from the same polished team.

2 Communication Cadence

Map every milestone to a timing rule and a channel so nothing depends on memory.

MILESTONE	TIMING	CHANNEL
Offer Accepted	Same day	EMAIL + CALL
Inspection Scheduled	Within 24 hours	TEXT
Inspection Results	Same day as report	EMAIL
Appraisal Ordered	When ordered	TEXT
Appraisal Complete	Same day	EMAIL
Clear to Close	Same day	EMAIL + CALL
Final Walkthrough	2–3 days before closing	TEXT
Closing Day	Morning of	TEXT
Post-Closing	Within 24 hours	EMAIL

3

Email Templates — Under Contract

TEMPLATE 01

TRIGGER — OFFER ACCEPTED

SUBJECT *You're Under Contract! Here's What Happens Next*

Hi [Client Name],

Congratulations — [Property Address] is officially under contract! I know this is an exciting milestone, and I want you to feel confident about everything ahead.

Over the next few days, we'll schedule your inspection and get the appraisal process moving. I've attached a simple timeline so you can see exactly what's coming and when. My transaction coordinator, [TC Name], will also be reaching out to introduce themselves — they'll be your go-to for document requests and scheduling.

Reach out anytime with questions. We're just getting started.

[Agent Name]

[Brokerage] · [Phone]

TEMPLATE 02

TRIGGER — INSPECTION COMPLETE

SUBJECT *Inspection Update — [Property Address]*

Hi [Client Name],

The inspection is complete, and overall the home is in [strong / good / fair] condition. The report flagged a few items worth reviewing — nothing unusual for a home of this age, but I want to walk you through the findings before we decide on next steps.

I've attached the full report. The items I'd recommend prioritizing are [item 1] and [item 2]. We have until [contingency date] to request repairs or credits, so let's connect by [date] to align on our approach.

[Agent Name]

[Brokerage] · [Phone]

4

Email Templates — Mid-Escrow

TEMPLATE 03

TRIGGER — APPRAISAL RECEIVED

SUBJECT *Appraisal & Loan Update — On Track for Closing*

Hi [Client Name],

Good news — the appraisal came back at [value], which [matches / exceeds] our contract price. That's one more contingency behind us.

Your lender, [Lender Name], is now moving into final underwriting. They may reach out for a few last documents — try to turn those around within 24 hours to keep us on schedule for our [date] closing. I'll flag anything time-sensitive directly.

[Agent Name]

[Brokerage] · [Phone]

TEMPLATE 04

TRIGGER — 7 DAYS BEFORE CLOSING

SUBJECT *One Week to Go — Your Closing Checklist*

Hi [Client Name],

We're one week from closing on [Property Address] — here's what to expect:

Final walkthrough: [date/time]. We'll confirm the home is in the agreed-upon condition.

Closing appointment: [date/time] at [location]. Please bring a valid photo ID.

Funds to close: must be sent via verified wire only — I will never text or email new wire instructions. Call our office directly to confirm any instructions before sending funds.

I'll send a final reminder the morning of closing. Almost there!

[Agent Name]

[Brokerage] · [Phone]

5 Email Template — Post-Closing

TEMPLATE 05

TRIGGER — DAY OF CLOSING

SUBJECT *Welcome Home! Thank You for Trusting Us*

Hi [Client Name],

Congratulations — [Property Address] is officially yours! It's been a pleasure guiding you through this process, and I hope the home brings you many great years ahead.

If anything comes up — a vendor recommendation, a question about the home, or just settling-in advice — I'm always a call away. And if you know anyone starting their own home search, I'd be honored to help them the way I helped you.

Welcome home!

[Agent Name]

[Brokerage] · [Phone]

6 Quick Status Text Templates

For fast, in-the-moment updates that don't need a full email.

INSPECTION SCHEDULED

"Quick update: your inspection is set for [date] at [time]. I'll follow up with the full report as soon as it's ready."

APPRAISAL RESULT

"Great news — the appraisal came in at value! We're on track for our [date] closing."

CLOSING CONFIRMATION

"Closing is confirmed for [date] at [time] at [location]. Bring your ID — see you there!"

GENERAL CHECK-IN

"Checking in — no action needed on your end right now. Everything is moving forward on schedule. I'll reach out the moment there's an update."

Consistency is the luxury.

Draft to Doorstep helps agents deliver a white-glove client experience on every file, from contract to close.

BRING YOUR FILES TO DRAFT TO DOORSTEP