

AGENT FIELD GUIDE

DRAFT **TO** DOORSTEP

Pre-Listing *Master Checklist*

FROM FIRST CONVERSATION TO ACTIVE ON MLS

A complete, room-by-room walkthrough for agents preparing to list a seller's home — every conversation, disclosure, document, and deadline mapped from initial consultation through go-live, with dedicated tracks for Florida and Indiana compliance.

Precision from Contract to Closing

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1 Initial Seller Consultation

PHASE ONE

The first conversation sets the tone for the entire listing relationship. Come prepared to listen, educate, and qualify.

- ☐ **Confirm ownership & title status** — run preliminary title/lien search, confirm all owners of record (spouse, trust, estate, HOA liens)
- ☐ **Discuss seller motivation & timeline** — why they're selling, target move date, hard deadlines
- ☐ **Walk the property** — note condition, visible repairs, updates/renovations and their dates
- ☐ **Present comparative market analysis (CMA)** — recent sold, active, and pending comps
- ☐ **Review pricing strategy** — list price, anticipated net sheet, seller concessions philosophy
- ☐ **Explain the transaction coordination process** — who does what, expected communication cadence
- ☐ **Collect seller contact & mailing information** for all parties on title

2 Listing Agreement & Core Documents

PHASE ONE

Executed and stored before the property can be entered into MLS.

- ☐ **Exclusive Right of Sale Listing Agreement** FL — FAR/BAR IN — IARA
- ☐ **Seller's Property Disclosure** — completed in seller's own words, signed and dated
- ☐ **Lead-Based Paint Disclosure** (required for homes built before 1978)
- ☐ **HOA / Condo Association Disclosure** — rules, fees, estoppel contact if applicable
- ☐ **Flood Zone / Elevation Certificate** — pull if in a designated flood zone
- ☐ **Homestead / Tax Exemption Status** — confirm current exemptions on file with county
- ☐ **Brokerage Compliance Packet** — W-9, agency disclosure, brokerage-specific addenda
- ☐ **Open file in transaction platform** (OpenToClose / Dotloop / SkySlope / KW Command)

State note — Florida: FAR/BAR listing agreement pairs with the AS IS Residential Contract for Sale and Purchase at contract stage; confirm which riders the brokerage requires before signing.

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Property Preparation

PHASE TWO

Tasks that get the home market-ready, coordinated between agent, seller, and vendors.

- | | |
|--|--|
| ☐ Recommend pre-listing repairs
Address items that will surface on inspection | ☐ Order pre-listing inspection
Optional, gets ahead of buyer inspection surprises |
| ☐ Schedule professional photography | ☐ Confirm utilities remain on
For showings and inspections |
| ☐ Schedule videography / drone
If lot size or view warrants it | ☐ Discuss lockbox / showing access |
| ☐ Book a stager or consult
Full staging or a decluttering walkthrough | ☐ Set showing instructions
Pets, alarm codes, notice window |
| ☐ Confirm curb appeal items
Landscaping, pressure wash, paint touch-ups | ☐ Confirm sign installation date |

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MLS Entry & Marketing Setup

PHASE TWO

Everything required to publish a complete, compliant, market-ready listing.

- ☐ **Draft MLS listing description** — seller review and approval before publishing
- ☐ **Verify property details against public record** — square footage, beds/baths, year built, parcel ID
- ☐ **Upload photos, floor plan, and matterport/3D tour**
- ☐ **Attach required disclosures to the MLS listing file**
- ☐ **Confirm showing service setup** (ShowingTime or brokerage equivalent)
- ☐ **Set MLS go-live date & coming-soon status** if applicable
- ☐ **Build social & email marketing assets** — brochure, just-listed post, agent email blast
- ☐ **Schedule open house** — if part of the marketing plan

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Compliance & File Audit

PHASE THREE

The transaction coordinator's final audit before the file is considered listing-complete.

- ☐ **All signatures & dates present** across listing agreement and disclosures
- ☐ **Brokerage compliance checklist satisfied** — matches office file requirements
- ☐ **Deadlines logged** — listing agreement expiration, any coming-soon-to-active date
- ☐ **Document storage confirmed** — transaction platform file complete and shared with seller
- ☐ **Commission & co-op terms confirmed** in MLS per brokerage policy

State note — Indiana: IARA listing paperwork and seller disclosure forms follow Indiana Association of Realtors formatting — confirm the correct county-specific addenda before file submission.

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Final Seller Walkthrough

PHASE THREE

A last conversation with the seller before the listing goes live.

- ☐ **Review the live listing together** — photos, description, price, terms
- ☐ **Confirm showing availability & notice preferences**
- ☐ **Set expectations on offer review & negotiation process**
- ☐ **Confirm communication plan** — frequency of updates, feedback sharing
- ☐ **Answer remaining seller questions** before go-live

AGENT SIGNATURE / DATE

TRANSACTION COORDINATOR / DATE