



# ESSENTIAL REAL ESTATE CHECKLISTS

MOD  
VIRTUAL



Find out how Realtors are making more money than ever - while spending less time at the office.

Leverage your business with a MyOutDesk Real Estate Virtual Assistant.

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No matter where you are located, no matter how big your team is, you can use these simple checklists to free up your time and close more deals. Print out these checklists and use them everyday — they are a lifesaver!

Fill out these checklists every time you have a new buyer under agreement, get a new listing, have to set up an open house, or to simply keep yourself accountable to your goals.

What do you think your business would look like if you had someone to help implement many of the tasks that are on these checklists? Do you want to find out?

Visit **[www.MyOutDesk.com](http://www.MyOutDesk.com)** and learn more about our Real Estate Virtual Assistants.

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# NEW LISTING

## CHECKLIST

### Property Address

  

### Seller Name & Number

  

### Seller's Email Address

### Showing Instructions

### Expires Date



DATE	INITIALS	COMPLETION LIST
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send seller a "Welcome to our Team" Letter
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Mark expiration date on Team Leader Calendar
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Set up automatic email to remind me to check on expiration 1 week in advance
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Post the property in MLS
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Make sure that a sign is in front of the home
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Order Trackwell post if applicable
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Prepare Design Center brochure
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send seller a letter "How to Prepare a Home to Show in 10 Minutes"
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Email MLS listing sheet to seller for OK
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Email current client database with the New Listing Information
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Do Reverse Prospect Email with New Listing
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Drop of listing sheet folder with sign in sheet at seller's home
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Drop of school reports & community profiles at seller's home
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Fill brochure holder in front of home
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Post the property on Craigslist
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Set up automatic email to remind me to repost on Craigslist after 1 week
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Go over advertising plan with Team Leader
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Get advertising proof approval from Team Leader
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Insert advertising deadlines in my personal planner
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Order a Visual Tour
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Make sure property is correctly listed on Realtor.com
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Verify office has correct showing instructions in MLS
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Post the listing on Team Website
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Just Listed postcards to entire neighborhood
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send listing sheet to Realtors with listings within the same town and price range
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send referral source a note letting them know property is listed and thanking them for their trust
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send "Choose Your New Neighbor" (MOS) to closest neighbors
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Add the property to Listing Board
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Leave new Listing Sheets in all agent mailboxes
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Schedule an open house if applicable
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send "Clean Room" award to seller's kids
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Order Home Warranty
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Make sure Home Warranty Ryder is on home
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Schedule property for a Team Tour
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Make sure that the property photos don't look seasonal

# OPEN HOUSE CHECKLIST

Property Address

  


Seller Name & Number

  


Seller's Email Address

Agent Covering Open House

Date of Open House

Hours of Open House

DATE	INITIALS	COMPLETION LIST
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- |                      |                      |   |
|----------------------|----------------------|---|
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Confirm Open House Date & Time with Agent by phone                               |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Call Seller to confirm Date & Time of Open House                                 |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Mark Open House in MLS   |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Place Open House in RE/MAX.com   |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Place Open House in Craigslist   |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Send Reverse Prospect Email in MLS about upcoming Open House                     |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Place Open House Advertisements  |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Put Open House Ryder on the home   |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Send "Come By My Open House" letter to neighborhood (MOS)                        |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Send "Come By My Open House" letter to potential buyers (MOS)                    |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Prepare Open House Packages with Client Surveys                                  |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Make sure to have plenty of school reports & community information at Open House |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Prepare "Other Listings You Might Like" reports for Open House                   |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Prepare "Open House Pass" for potential buyers (MOS)                             |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Prepare Team Giveaways for Open House  |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Give Open House Checklist to Team Members conducting the Open House              |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Send Thank You cards to all who attended the Open House                          |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Call the Seller with Open House feedback on the following morning                |



# UNDER AGREEMENT CHECKLIST

## OUR BUYER

### Property Address

  

### Seller Name & Number

  

### Commitment Date

### Closing Date

### Home Inspector's Name & Number

### Date & Time of Home Inspection

### Mortgage Company Name & Number

### Closing Attorney Name & Number

### Appraiser Name & Number

### Date & Time of Smoke Certification



DATE	INITIALS	COMPLETION LIST
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Listing Agent a personal notecard from Team Leader
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Buyer Letter "Congratulations on Accepted Offer" (MOS)
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Call Buyer to have them book the Home Inspection
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Verify that the date & time of Home Inspection is acceptable to Listing Agent
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Home Inspector a personal notecard from Team Leader
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Mark Team Leader calendar with date & time of Home Inspection
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Call Lender for updated mortgage approval
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Ask Lender for Closing Attorney contact information
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Ask Lender for Appraiser contact information
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send personal note to Lender with Team Leader's business card
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send personal note to Closing Attorney with Team Leader's business card
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send personal note to Appraiser with Team Leader's business card
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Receive copy of updated approval
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Mark board with under agreement information
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Change status in MLS to UAG
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Set up automatic email to remind me to check on commitment 1 week in advance
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send "Congratulations, You're Under Agreement" letter to the buyer
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Mail Just Sold postcards
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Thank You card to buyer with information about the town
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Thank You card to seller with (contact info is on HUD)
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Thank You card to Listing Agent
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Thank You card to Lender
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Thank You card to Closing Attorney
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Thank You card to Appraiser
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Thank You card to office staff members for another smooth deal
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Thank You card to home owners insurance company
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Call referral source and notify them about another smooth move
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send thank you and tickets to referral source
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Buyer movie tickets so they can sit back and relax one week later
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Call Buyer on week anniversary date to make sure no loose ends

## UNDER AGREEMENT CHECKLIST

# OUR LISTING

### Property Address

  

### Seller Name & Number

  

### Commitment Date

### Closing Date

### Home Inspector's Name & Number

### Date & Time of Home Inspection

### Mortgage Company Name & Number

### Closing Attorney Name & Number

### Appraiser Name & Number

### Date & Time of Smoke Certification



DATE	INITIALS	COMPLETION LIST
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Buyer's Agent a personal notecard from Team Leader
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Verify with Buyer's Agent the date & time of Home Inspection
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Home Inspector a personal notecard from Team Leader
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Notify Seller of Home Inspection date & time
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Mark Team Leader calendar with date & time of Home Inspection
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Call Lender for updated mortgage approval
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Ask Lender for Closing Attorney contact information
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Ask Lender for Appraiser contact information
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send personal note to Lender with Team Leader's business card
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send personal note to Closing Attorney with Team Leader's business card
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send personal note to Appraiser with Team Leader's business card
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Receive copy of updated approval
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Mark board with under agreement information
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Change status in MLS to UAG
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Set up automatic email to remind me to check on commitment 1 week in advance
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send "Congratulations, You're Under Agreement" letter to the seller (MOS)
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Receive copy of fully executed accepted offer from all parties & place in file
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Prepare preliminary purchase agreement and email it to buyer agent for review
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Receive fully executed copy of Purchase and Sale Agreement
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Thank You to seller's kids with friendly gift certificates for ice cream, etc.
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Leave all Escrow checks with Broker
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Fax P&S to Lender
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Call all previous open house attendees notifying them of status change
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Notify Seller to contact Closing Attorney to talk about deed preparation
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Call Seller to find out if they need moving company referral
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Contact Appraiser and fax comparable properties
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> One week prior to commitment date, verify with lender everything is on schedule

## UNDER AGREEMENT CHECKLIST

# OUR LISTING

### Property Address

  

### Seller Name & Number

  

### Commitment Date

### Closing Date

### Home Inspector's Name & Number

### Date & Time of Home Inspection

### Mortgage Company Name & Number

### Closing Attorney Name & Number

### Appraiser Name & Number

### Date & Time of Smoke Certification



DATE	INITIALS	COMPLETION LIST
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Receive mortgage commitment
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Notify Seller to have utilities switched and delivery changed
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Schedule Smoke Detector Certification with fire department
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Notify Seller of Smoke Certification appointment and remind them to leave \$\$\$
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Notify Team Leader of date & time of Smoke Certification
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> After Smoke Certification, send personal note to fire department
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Call Town/City Hall for final water reading
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Town/City Hall official a personal note
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Notify Sign Removal company when to remove signs
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Make sure all directional signs are removed
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Order closing gift
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Prepare Just Sold postcards for neighborhood
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Schedule a walkthrough with buyer's agent
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Notify Seller of scheduled walkthrough
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Verify time & place of closing with Closing Attorney
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Put closing time & place on Team Leader's Calendar
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Add client to past client database
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Change status in MLS to CLOSED
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Place property on Closed Board
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Mail Just Sold postcards
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Thank You card to seller
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Thank You card to buyer with information about the town
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Thank You card to Buyer's Agent
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Thank You card to Lender
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Thank You card to Sign Removal company
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Thank You card to Appraiser
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Thank You card to all office staff members
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Call referral source and let them know this was another smooth move
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send referral source movie tickets
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Send Seller movie tickets one week later so they can sit back and relax
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Call Seller on week anniversary date to make sure no loose ends
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Make sure all escrow checks are delivered to Listing Agent
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Fax P&S to lender
<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Notify buyer to shop for homeowner's insurance



## UNDER AGREEMENT CHECKLIST

# OUR LISTING

Property Address

  

Seller Name & Number

  

Commitment Date

Closing Date

Home Inspector's Name & Number

Date & Time of Home Inspection

Mortgage Company Name & Number

Closing Attorney Name & Number

Appraiser Name & Number

Date & Time of Smoke Certification

DATE	INITIALS	COMPLETION LIST
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- |                      |                      |  |
|----------------------|----------------------|--|
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Notify Buyer to contact Closing Attorney to start preliminary scheduling of closing |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Call buyer to find out if they need moving company referral                         |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> One week prior to commitment date, verify with Lender everything is on schedule     |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Receive mortgage commitment   |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Call Buyer to make sure they are comfortable with the commitment terms              |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Call Buyer to remind him to notify current landlord about the move                  |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Send Buyer's landlord a note card offering assistance with rental of unit           |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Notify Buyer to have utilities switched and mail delivery changed                   |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Order closing gift  |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Schedule walkthrough with Listing Agent   |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Put walkthrough on Team Leader's calendar   |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Verify time & place of closing with Closing Attorney                                |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Put closing time & place on Team Leader's calendar                                  |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Notify Buyer to contact Closing Attorney for closing figures                        |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Add client to past client database  |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Verify that list office has changed status in MLS                                   |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> Place property on Closed Board  |





**ESSENTIAL**

**REAL ESTATE**

**CHECKLISTS**

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