

Buyers Checklist

Cultivate	Watch Lead - 5% Get the Lead's Phone Number Get the Lead's Email Get the Lead's Current Address Update Database As Needed	Nurture Lead - 7% Follow-Up Call or Mailer from Initial Contact w/ Lead Put on a Buyer Drip Campaign Send Call To Action - Mailer/Call/Email	Hot Lead - 10% Assist Buyer w/ Pre-Approval Keller Mortgage Pre-Approval? Compile List Of Properties To Show Buyer Set Up Buyer With A Buyer Tips Campaign	
Appt.	Scheduling Initial Appt - 10% Start To Create Client Folder Include Contact Info, MLS Printouts Etc. Introduction & Pre-Qualfy Client Schedule Buyers Consult	Initial Appt - 20% Send Reminder To Client of Appt Time/Day Obtain Signatures on Contract?	Contract Appt - 25% Obtain Signatures on Contract Submit Contract	
Active	Searching - 50% Search For & Compile Properties To Show Client Based in Interests Update Opportunity Details in Pipeline	Showing - 70% Set Up Times To Show Client Properties	Negotiations - 80% Submit & Negotiate Terms of Offers on Client's Behalf Start To Add Offers Into The Opportunity Details in Pipeline Update Opportunity Details As Needed in Pipeline	
Under Contract	Open Escrow - 90% Submit Contract Call/Email Buyer to Congratulate Them Send Buyer a List of Inspectors Send Buyer Copy of Contract Call/Email Buyer With Updates during Escrow Process Give Buyers List of Home Protection Plan Choices Confirm Earnest Money Deposit Coordinate Home Inspection Choice & Appt. (5) Days In - Confirm Clients Have Received Escrow Package & Assist w/ Any Questions Confirm Delivery to Escrow Package Call To See If There Are Any Requests From The Lender	Inspections - 90% Assist Buyer (If Needed) To Set Up Inspections Obtain Disclosures From Seller Buyer - Review & Approve Prelim Confirm w/ Listing Agent When Inspections Are Scheduled Review & Approve Termite Report Obtain Inspection Report Remove Inspection Contingencies Review & Complete Escrow Instructions	Appraisal & Financing - 90% Set Up Appraisal For Buyer Confirm w/ Lender Appraisal is Ordered Confirm Appraisal Is In @ Value Obtain Inspection & Disclosure Contingency Removals Submit Home Protection Plan Choice To Escrow Confirm w/ Lender There Are No Outstanding Conditions Remove Appraisal & Loan Contingencies Pre-Closing - Verify Closing Disclosure Has KW Processing Fee Included	Clear to Close - 90% (1) Week Prior To "Clear To Close" Make Sure There Are No Outstanding Items With Escrow (1) Week Before "Clear To Close" Verify Home Protection Plan Has Been Ordered Final Walk Through Approx. (5) Days Before Closing Remind Buyers To Turn On Utilities Coordinate Possession & Keys For Buyer Order Gift For Buyers
Closed	Closed - 100% Update Database Update/Finalize Opportunity Details in Pipeline Create/Order Just Sold Marketing Pieces Get A List Of Closest 100 Homes From Title Put "Just Sold" Sign In Front Yard & Set Reminder To Take Down After 2 Weeks Get Photo In Front Of House W/ Buyers Post Photo w/ Permission Of Buyers Deliver Gift To Buyer Send Thank You Card To Listing Agent Ask For Referral / Testimonial Set-Up Schedule For Client Follow-Up After Close Of Escrow			