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|  | TASK |
| 1 | Agent calls potential client to arrange a time to meet and obtain details about the property |
| 2 | Agent ensures all decision makers will be present at meeting |
| 3 | Agent adds vendors contact details on phone |
| 4 | Agent adds appointment to personal calendar |
| 5 | Agent sends SMS to potential client to thank them for the opportunity |
| 6 | Agent/Admin orders ARE from Eckermann's |
| 7 | Agent completes a TMP to provide to Admin for Prelisting kit prep |
| 8 | Admin prepares pre-listing kit with questionnaire, sample brochure & cover letter, property magazine, agent profile booklet |
| 9 | Admin/Agent delivers pre-listing kit (preferably within the hour) & SMS potential vendor |
| 10 | Admin/Agent to research & prints comparable Sales reports |
| 11 | Admin prepares TMP with Marketing Costs Selection booklet, Service Offering Selection booklet, Sales Agency Agreement & Benefits Form, ARE |
| 12 | Admin enters potential Vendor into CRM & set “Appraisal” Track |
| 13 | Agent confirms appraisal on the morning of the appointment with an SMS |
| 14 | Agent meets with potential Vendor and completes the appraisal |
| 15 | Admin prepares written appraisal report hand-deliver with coffee vouchers &/or gift |
| 16 | Agent hand-delivers report with coffee voucher or Haighs chocolates |
| 17 | Agent receives confirmation from vendor to proceed with listing & arranges signing of Residential Sales Agency Agreement |
| 18 | Admin checks Residential Sales Agency & enters as Listing into CRM |
| 19 | Admin completes the "New Listing Checklist" and prepares black folder |
| 20 | Admin checks for Vendor email addresses & if required call or SMS client to obtain |
| 21 | Admin sets track (New Listing 1) as at date of signing Sales Agency & removes Appraisal trail (if applicable) |
| 22 | Admin completes the marketing section of CRM |
| 23 | Admin confirms if Marketing has been paid upfront and prints/saves Tax Invoice |
| 24 | Admin creates Property Folder in Network |
| 25 | Admin scans & files Residential Sales Agency in Network folder |
| 26 | Admin creates OFI Folder (including rental appraisal from RP Data) |
| 27 | Admin email/post "Thank You For Listing" letter with copy of Sales Agency Agreement & Seller's Guide & Marketing Tax Invoice |
| 28 | Admin sends Form 1 Request Email through to Eckermann Forms |
| 29a | If auction - Agent books auctioneer |
| 29b | If Auction - Admin completes auction day checklist and auction day paperwork checklist |
| 30 | Agent/Admin creates and delivers Just Listed letterbox drops |
| 31 | Agent to organise a time to have dropped off to office or collect keys if Vendor agrees |
| 32 | Admin secures keys and stores in key safe |
| 33 | Agent organises Home Stylist, Floor Plan & Photography |
| 34 | Agent adds appointments to personal calendar |
| 35 | Agent/Admin attends photography appointment at property |
| 36 | Admin receives proof photos and saves to Network Folder under "Proofs" |
| 37 | Agent/Admin selects photos for retouching |
| 38 | Agent/Admin emails photos to vendor for approval |
| 39 | Agent/Admin emails approved photo list to Gainsborough |
| 40 | Agent/Admin emails floor plan to vendor for approval |
| 41 | Agent/Admin completes write-up text and emails to vendor for approval |
| 42 | Admin uploads property onto internet on MONDAY |
| 43 | Agent confirms open time with Vendor &/or Tenant and has Admin update online |
| 44 | Agent/Admin checks for newspaper advert request/budget in Sales Agency Agreement |
| 45 | Admin to place newspaper advert if requested |
| 46 | Admin orders signboard & emails to vendor for approval |
| 47 | Admin to email vendor approval to Read Bros |
| 48 | Admin to send write-up text & floor plan to Gainsborough to create brochures |
| 49 | Agent/Admin to proof check brochures & send approval to Gainsborough |
| 50 | Admin receives print ready brochure file from Gainsborough & print inhouse |
| 51 | Admin to create & display window card |
| 52 | Admin to submit editorial to Messenger & Advertiser |
| 53 | Agent/Admin to create & deliver First Open Invitation letterbox drop |
| 54 | Admin adds property to Weekly Property Magazine |
| 55 | Agent/Admin prepares for OFI: |
|  | \* For all new properties, secure the Agent's magnet with a paperclip onto the front cover of at least 30 brochures |
|  | \* Put brochures into a plastic folder and label using the label inside the cover of the black OFI folder |
|  | \* Put a brochure inside the plastic sleeve cover of the black OFI folder for new properties |
|  | \* Check other properties open over the weekend and ensure they have at least 20 brochures prepared with magnets secured |
|  | \* Check the black OFI folders are complete with rental assessments, offer forms and Form 1 |
|  | \* Put the coloured plastic file box and the black OFI folder into a box with labels facing upwards |
| 56 | Agent/Admin prepares the OFI basket with: |
|  | \* Current weekly magazines 2-3 per property to be opened |
|  | \* Full lolly jar |
|  | \* Bluetooth speaker with charger |
|  | \* Business card holder (with business cards) |
|  | \* Orange folder with Form R3's |
|  | \* At least 3 Busy Nipper's bags |
|  | \* Clipboard with OFI sheets & extra offer forms and/or charged iPad |
| 57 | Agent/Admin conducts OFI with standard SP setup - e.g.. Music, lollies, etc |
| 58 | Agent/Admin records names and numbers of all attendees |
| 59 | Agent calls Vendor after OFI to update them |
| 60 | Agent/Admin generates thank you for attending text message to all attendees at conclusion of ofi |
| 61 | Agent/Admin completes call-backs on Monday at the latest to organise 2nd viewings, obtain feedback and handle offers |
| 62 | Agent negotiates offers where applicable & presents to Vendor |
| 63 | Agent to get written offer with all conditions & copy of purchasers ID & provide all paperwork to Admin |
| 64 | Admin types up contract |
| 65 | Agent/Admin gets contract signed by all parties along with acknowledgement of Form 1 documentation |
| 66 | Agent/Admin places file with completed contract and Form 1 in the "Awaiting Deposit" tray for processing |
| 67 | Admin sends copy of Contract & Form 1 with 'Congratulations' Letter & Moving Checklist to VENDOR & PURCHASER |
| 68 | Admin enters Purchaser details into CRM |
| 69 | Admin completes Sales Commission screen in CRM |
| 70 | Admin sets Settlement Trails for Purchaser and Vendor in CRM |
| 71 | Admin places reminder in calendar to follow up finance approval 2 days prior to due date, if required |
| 72 | Agent coordinates building &/or pest inspections if required |
| 73 | Agent/Admin to attend building &/or pest inspection |
| 74 | Admin completes Settlements spreadsheet including Under Contract tab in Network |
| 75 | Admin receipts deposit paid by purchaser |
| 76 | Admin updates property as UNDER CONTRACT online |
| 77 | Agent updates property as UNDER CONTRACT on signboard |
| 78 | Agent/Admin obtains Conveyancer details from Vendor & Purchaser |
| 79 | Admin checks if Vendor Paid Marketing has been received |
| 80 | Admin completes story sheet and sends with Contract and Form 1's sent to Conveyancers |
| 81 | Agent/Admin to follow up finance approval (if applicable) |
| 82 | Admin organises signboard removal for the day after settlement once contract is unconditional |
| 83 | Admin to print & organise delivery of Just Sold campaign |
| 84 | Agent updates property as Sold on signboard & get photo with Vendor &/or Purchaser |
| 85 | Agent/Admin to post SOLD photos on Social Media |
| 86 | Agent arranges with vendor to provides keys & remotes prior to settlement |
| 87 | Admin prepares settlement gifts for both Vendor and Purchaser |
| 88 | Agent calls purchaser to congratulate them and organise pick up or delivery of keys and gift |
| 89 | Agent calls Vendor to congratulate them and organise to deliver gift and thank them once again |
| 90 | Admin updates addresses, send service survey letters, set Anniversary tracks |
| 91 | Admin updates as SOLD online (display price unless otherwise instructed) |
| 92 | Admin prepares file for archiving |
| 93 | Agent calls Vendor & Purchaser after settlement - 1 week, 1 month, 6 months |
| 94 | Agent makes annual anniversary phone call and Admin sends card & gift to Vendor & Purchaser |