



Buyer Lead Sheet

Date: _____ Lead Generator: _____
Assigned to: _____ Status: A B C
Referral Fee? Y/N To Whom? _____ % _____ Phone: _____

Prospect: _____ Spouse: _____

Address: _____

City: _____ State: _____ Zip _____

Home phone: _____ Work: _____

Cell: _____

Fax: _____

Email: _____

Text: Y/N Preferred number to text to: _____

How do you prefer to be contacted? _____

Own? - Y/N Rent? - Y/N Lease up _____ Rent amount: \$ _____

If own... is house on market? Y/N Have to sell first? Y/N

Working with an agent? Y/N How long looking? _____

Motivation level: 1 2 3 4 5

Best time to look: AM Afternoon PM Weekend

Price range: _____ When to move? _____

Desired areas: _____ #

Bedroom(s) _____ # Bath(s) _____ Garage? Y/N _____

Special requests:

Initial Consultation: Date _____ Time _____ Agent _____

Will you be paying cash, or will you need to obtain financing? _____

Lender? Y/N If yes, company: _____

Contact: _____

Phone: _____

Approved amount? _____ Type: _____

If no, may we have a preferred lender call? Y/N

Referred to:

ACTION: Send Buyer Book? Y/N Relo Package? Y/N DATE NEEDED: _____
COMPLETED BY: _____



Seller Lead Sheet

Date: _____ Lead Generator: _____

Assigned to: _____ Status: A B C

Referral Fee? Y/N To Whom? _____ % _____ Phone: _____

Prospect: _____ Spouse: _____

Address: _____

City: _____ Zip: _____ Preference: Phone / Email

Home Phone: _____ Work: _____

Cell: _____ Spouse Cell: _____

Email: _____

Is the property address the same as your mailing address? **Y/N**

If NO, _____

How long have you owned your home? _____ Why are you selling? _____

Moving to? _____ When do you need to be there? _____

Need Agent? **Y/N** Provided contact info for: _____

Bedrooms: _____ # Baths: _____ Age: _____ Style: _____

Subdivision: _____ Garage: _____

Square feet: _____ Lot size: _____ Septic: Y / N obtained: _____

Special features: _____

Updates last few years? **Y/N** If YES, what? _____

Rate your house 1-10 _____ What would be an acceptable selling price to you? _____

What do you owe? (1st) _____ (2nd) _____

How did you hear about us? _____

What are three things you are looking for in a Realtor?

1 _____ 2 _____ 3 _____

Have you or are you going to talk with any other agents? **Y/N**

When can you come to the office to meet with the team? _____

ALTOS: _____ LISTING LEADS: _____ HIGHRISE: _____ NARRPR: _____ USDA: _____ Post visit: Phone call _____

Personal Note _____ 2 week check up calendared _____

APPT: _____ HANDBOOK EMAIL: _____ DOCUSIGN: _____ RPD/PLQ: _____



New Listing Lead Checklist

- _____ Lead Sheet completed?
- _____ Appt set?
 - _____ NARPR report saved?
 - _____ Email "Staging Criteria" and "Seller Survival Kit"?
- _____ Added to Altos?
- _____ Added to Contactually?
- _____ Tax card pulled?
- _____ If necessary, septic permit pulled
- _____ Old MLS pages?
- _____ Added to calendar, add day before to confirm
- _____ Short sale? Send short sale email, forms and attorney info
- _____ Scan into listing leads DB
- _____ Referral? Scan into referral DB
- _____ USDA eligible



What Your Home Is/Is Not Worth

The Market Value of your home is NOT:

- What you have in it
- What you need out of it
- What you want
- What it appraised for
- What your neighbor's house says it is worth
- What the tax office says it's worth
- How much it is insured for
- Based on memories and treasures
- Based on prices of homes where you are moving

The True Market Value of your home is what a buyer is willing to pay:

- Based on today's market
- Based on today's competition
- Based on today's financing
- Based on today's economic conditions
- Based on the buyer's perception of the condition
- Based on location
- Based on normal marketing time
- Based on showing accessibility

Properties that sell in Today's Market: On a scale of 1-10, The 10s are the ones that are selling. How can your home be a "10"?

- By improving the condition dramatically
- By offering good terms
- By improving the way your home shows
- By adjusting the price

As a Seller you control:

- The price you ask
- The condition of the property
- Access to the property

As a Seller you do not control:

- Market conditions
- The motivation of your competition
- Value



10 Favorite Features

To assist us in marketing your home, please tell us your 10 favorite qualities or features.

Home

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Community

1. _____
2. _____
3. _____
4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____



VIP Questionnaire

*In order to better serve you, please complete and return this sheet with your listing paperwork.
Thank you very much for the opportunity to serve you!*

Your name: _____

Spouse/Significant Other's name: _____

Mailing address: _____

Physical address: _____

Phone numbers: _____

You: Home: _____ Mobile: _____

Work: _____ Fax: _____

Spouse: Work: _____ Fax: _____

Email Address - You: _____

Spouse: _____

SPECIAL DATES	Month	Dates	Gender	Name
Your birthday				
Spouse/SO bday				
Child #1 birthday				
Child #2 birthday				
Child #3 birthday				
Child #4 birthday				
Wedding Anniv.				

Favorite Things	You	Spouse/Significant Other
Flower		
Color		

Restaurant		
Holiday		
Sport/Hobby		
Other		

Please list any friends or family members who may be in need of assistance at this time:



Seller 10s Sheet

Client Name: _____

Property: _____

On a scale of 1-10, with 1 being not so desirable and 10 being extremely desirable, what one thing has to happen in this transaction for your experience to be a 10?

What is important to you about that?

If we could add just one more thing, what other thing has to happen to make your experience a 10+?

What is important to you about that?

If we could add just one more thing for this experience to be a 10++, what would it be?

What is important to you about that?

How does someone lose with you?

What do you feel you have the right to expect from us?

What do you feel we have the right to expect from you?

Seller's Initials _____

Agent's Initials _____



**Please provide us with the following information
on your home:**

- Copy of Deed.
- Copy of Title Insurance Policy.
- Copy of Floor Plan of House.
- Home Owners Association name, contact person phone number, amount of dues and how paid.
- Name, phone number and loan number of all Mortgages on property and Home Equity Line.
- Copy of Deed Restrictions and Restrictive Covenants.
- If you would like to, you can provide the Utility Bills (Power, Natural Gas – if applicable, and Water) for the past 12 months. Many buyers are interested in how much their utilities will cost them in the homes they are considering purchasing.
- If you have filed any insurance claims against your homeowner's policy in the past 10 years, please list the claims and circumstances.
- Copy of Appraisal.
- List of improvements, upgrades and repairs (item, amount, and date) and note whether or not permits were acquired.
- If spouse is deceased, please provide the death certificate.
- If there is a septic system, need map for certification before closing.

Leigh Brown's Staging Criteria

When you get ready to place a home on the market for sale, it becomes a product...and just like any product on the shelves at your local store, it has features and benefits/ pluses and minuses, and there are other products to compare. To gain an edge in your marketplace **you must be priced right and look better than the competition**. Sometimes it's difficult to think of a home as a mere product, but it helps to think that way so that you can get top dollar for your property and sell it in a reasonable amount of time.

When you sell your home you're going to have to move. When you move you're going to have to pack. Most of the principles of staging just mean that you're going to pack up some of your things early. It's a little bit of work, but you're going to have to do it anyway, so let's do it now so you can get top dollar for your property!

General Comments

- If your electric bill doesn't go up while your house is on the market - you are doing something wrong! While on the market your house will have the screens off of the windows, lights and music should be left on in case of a showing, and a comfortable temperature should be maintained.
- In every room.....stand at the doorway and look at the room through the eyes of a buyer. What do you see? Be tough on yourself: What can you live without while your home is on the market?
- Most carpets need to be cleaned. Have them professionally cleaned before coming on the market.
- *"Buyers only know what they see...not the way it is going to be!"* Unless your home is a "fixer", badly worn or very out of date carpets should be replaced before coming on the market. Offering a buyer a credit to pick their own new carpet or a discount off the price is far less effective and will always end up costing you more money and slow the selling process. Pick a light-colored short plush or frieze carpet. "Real-estate beige" is the safest color.
- Check all light fixtures. Are they working properly? Replace all burned out light bulbs. Look for dark hallways and corners and increase the wattage of bulbs in those areas.
- Make sure there are lamps with adequate bulbs for dark corners that are turned on for showings.
- Repair and repaint cracks on walls and ceilings.
- Repair or replace broken light switches and switch plates. Clean any dirty areas around them.
- Keep all curtains and blinds open during the day to let in light and views. The extra cost of additional heating or air conditioning is a necessary cost of selling.
- Reduce the number of pillows on couches to zero or two. Remove all afghans and blankets. Pick up all valuable items to protect them. If necessary, take them to a safe deposit box.
- Fireplaces need to be cleaned out. Glass doors should be cleaned. Mantles and hearths need to be cleared off except for a very few necessary items.
- Take a hard look at those beloved house plants. In most cases they need to be pruned and/or the number of plants reduced to create more space. If plants don't look healthy and are just barely clinging to life throw them away.
- To create more space you may want to remove a chair, a love seat or other pieces of furniture.
- Remember the model home!
- White Glove Clean - From the ceiling to the baseboards and floors.
- Pack up all collections (you're going to need to pack them up sooner or later anyway). They become a distraction for buyers from the desired focal point...your home.

- Reduce the number of books on bookshelves. Pack up extra books early!
- Remove all family pictures on shelves, pianos, tables and walls.
- Reduce the number of wall-hung photos and paintings in every room to one large piece on a wall or a small group of three. Make sure they are hung at eye level.
- Keep soft music playing at all times for showings. Easy-listening or light jazz, not hard rock or funeral music.
- Be sensitive to odors, because buyers are! Excessive cooking or smoking odors, dog or cat odors, baby, laundry and mildew odors will turn off buyers. If there is a challenge with odors in your home use room deodorants or disinfectant sprays and keep windows cracked open for ventilation even in very hot or cold weather. (There are great products in pet stores for pet odors, and many professional carpet cleaners have special ozone machines that can really help with difficult odors.) You can't sell it if you can smell it!
- Wash all windows and make sure they operate freely. If the seal is broken on a double-pane window, replace it now.
- Repair items that are broken. This will show that your home is well-taken-care-of. In most cases, buyers will ask for them to be repaired anyway, so do it now
- Don't be afraid to move furniture from room to room. That extra chair from the living room or dining room may just look great in the master bedroom.
- Dog & cat dishes, pet bedding and toys should be placed in the garage.
- In general pack up the little things. Little things create clutter and they need to be packed up anyway, so pack them up now.

Inside of Home

- If you go into a model home that is newly constructed, you will see that they are usually sparsely decorated. In a resale home, you need to create space for buyers to mentally move into the room by reducing clutter and the overall number of items.

Living Room, Family Room, Den, Bonus Room or Rec Room

- Clear off all coffee tables and end tables to just 2 or 3 magazines and one nice vase or statuary.
- Remove all ashtrays.

Dining Room

- Clear off dining room table except for one nice centerpiece
- Remove tablecloths from table
- Remove extra leaves from the table to make the room look bigger
- Remove extra dining room chairs if they crowd the table or fill up the corners of the room. Four or six chairs are plenty. It will make the room look bigger and you can put the extra chairs in the garage or storage unit.
- See the living room section above concerning removing or reducing the number of items, valuable items, and collections. It all applies here too, especially in a buffet.

Kitchen

- The main question in the kitchen is...what can you live without? Clear off counters leaving only a very few items that you have to use on a daily basis. Everything else should be kept off the counters to create space. Most homes have far too many small appliances and other items out that should be stored out of sight. Leave out a few large decorative items like a bowl of fruit or a basket with bread in it.
- Repair any tile or Formica counter tops and edges that have been damaged or come unglued.
- Clean tile grout with bleach if it is stained.
- Remove all magnets, photos, children's drawings, etc. from the front of the refrigerator. If there are a couple of truly necessary items put them on the side of the refrigerator.
- Clean the stove top and oven. Replace old burner pans if they are badly stained. Clean all exhaust fans, filters and hoods.
- Clean the kitchen floor and keep it clean for showings
- Keep the kitchen sink clean and empty on a daily basis.
- Make sure the kitchen faucet is working smoothly without drips and that it is clean.
- Clear everything off the window ledge above the kitchen sink.
- Remember to pack up the collections in the kitchen too. Pack up your antique plate collection or whatever will distract buyers and take up space.
- Keep all soaps, towels, scouring pads and cleaning supplies out of site under the sink.
- Some kitchens have too many scatter rugs in them. Too many rugs make a room look smaller. If space allows, one large Oriental rug in the middle of the kitchen looks great.
- Empty the garbage regularly to prevent kitchen odors.
- Move dog and cat dishes so that they don't interfere with buyers walking around the room.

Master Bedroom

- Make the bed every day.
- Invest in a new bedspread if necessary.
- Clear off bedside tables and chest of drawers except for a very few necessary items. (See living room coffee and end tables)
- Store extra books and magazines underneath the bed.
- Keep closet doors closed. If you have a walk-in closet, keep the floor clean and free of laundry and clutter.
- If you have a clock radio keep it playing soft music during showings.
- Reduce the number of photos on tables and chest of drawers to a minimum.

Hallways

- Remove plastic runners on carpet or hardwood floors.

Additional Bedrooms

- See master bedroom guidelines.
- In children's rooms take down all the posters except for one favorite over the bed. Repair nail holes and paint walls.

Laundry Room

- Put soaps and cleaners in a cupboard or reduce the number and organize them neatly on one shelf.
- Just like in the kitchen, keep counters and sinks clean and empty.
- Get rid of excess hangers and hanging laundry. If you have a drying area replace all those miscellaneous hangers with one style of white plastic hangers.
- Make sure that light bulbs are working and have adequate wattage. Many laundry rooms are too dark and need to be brighter.
- Put a large bowl of Tide detergent (not liquid) on top of the dryer with a scoop in it. Use it and it gives that clean fresh smell to the entire area.

Bathrooms

- Clear off counters. Reduce toiletries down to a decorative few (3-6) and consolidate them on a tray or decorative basket. Put everything else in drawers or cabinets.
- Replace that ugly dirty hand soap with a neat bottle of liquid soap.
- Coordinate all towels with one or two colors. Fold in thirds and hang neatly every day. New towels can be purchased very inexpensively if the ones you have don't match.
- Clear everything out of the shower and tub except for one bottle of liquid soap and one shampoo.
- Clean or replace the shower curtain. Keep shower curtains drawn at all times.
- One common problem in a lot of bathrooms is cracking or peeling just above the top of the shower tile or tub enclosure where it meets the drywall or ceiling. Repair using caulking and paint or install wood trim coated in polyurethane
- Get rid of mold and stains throughout bathroom, especially in the shower and bathtub area.
- Many tubs and showers need a fresh new bead of silicone caulking around the edges to make them look neat and clean.
- Take all cloth toilet lid covers and water closet covers off. Keep toilet lids down everyday.
- Scatter rugs in front of sink, toilet and shower make the room look small. Use one larger rug in the middle of the room or none at all.
- Hide all cleaning supplies and the garbage can under the sink or out of the line of sight.

Closets

- Make sure you can open the door freely without something falling out on the buyer.

Basements

- Be aware of smells, musty odors, and dampness. Do your best to alleviate problems by repairing and cleaning problem areas. Use room deodorants and disinfectant sprays to help with any odors.
- If you use the basement for storage, condense the piles to one corner of one area of the basement.
- Repair any cracks in the ceilings and walls.
- Clear any drains.

Garage or Carport

- Carports have to be completely cleaned out....everything!
- Garages should be swept out and organized. If you have to use part or the entire garage for storage, that's fine, just keep it neat.
- Always keep garage doors down while your home is on the market.
- If you're not using the garage for storage, keep cars in the garage and not in the driveway.
- Move boats and RVs to a storage facility or neighbor's home several homes away until your home sells.
- If garage floor is very stained, paint with gray or beige concrete paint.

Where do I store all the stuff I took out?!

- Rent a storage unit (we have a discount with PODS)
- Have a garage sale
- Give it to charity (Habitat for Humanity will pick up! 704.786.4000)
- Put it in the attic
- Store it in the crawl space
- Use a portion or corner of the basement
- Use part or all of the garage
- As a last resort, sacrifice a third or fourth bedroom and fill it full.

Outside of Home

- The first impression when a buyer drives up to your home is critical. Walk across the street and look at it through the eyes of a buyer. Be tough on yourself. What do you see?

Trim & House Paint

- Take a hard look at the front door and trim. Give special attention to this because this is where buyers will get their first opportunity to make a close inspection of your home. Does it need repainting or staining? Repainting the doors and trim to help make the house look crisp and in good condition is one of the least expensive things you can do to dress up a home.

Decks, Porches & Patios

- Sweep all decks, walks, porches and patios and keep them swept.
- Remove any moss from all decks, walks and patios.
- Decks should be pressure-washed, stained or painted if they are in need of it.
- Reduce clutter on decks, porches and patios so that they look bigger. Get rid of old flowerpots, barbecues, charcoal, planters, toys, construction materials and excess furniture.
- If you have outdoor furniture, create one simple 'room setting' of clean furniture that will remind buyers of the usefulness of the space.
- Decks & patios should look like you are going to entertain there.

Roof

- Clean all debris and moss from roof and gutters.

Fences

- Repair broken fences and paint if necessary.

Landscaping

- Plants are like children...they grow up so fast! First they are little and cute, then they seem just right, and all of a sudden they're so big we hardly know how to take care of them! You can't trim the kids, but you can trim the plants. If they need it, do it now.
- Rake and weed flower beds. If possible, spread new mulch such as beauty bark, pine needles, gravel or lava rock to put a finishing touch on the landscaping.
- Remove and, if needed, replace all dead plants.
- Mow lawn and keep it mowed on a weekly basis during the growing season
- Trim branches around roof line to prevent animals, insects and foliage from getting on the roof.

Front Yard

- "Curb appeal" is important. Has your landscaping overgrown the house? Remember... "You can't sell it if you can't see it!" Cut back all shrubs to window height that block light or view from windows. (If you're afraid they won't bloom next year, don't worry, you won't be there!)
- Move all children's toys to the backyard.
- Clean and sweep paved driveways. Rake, weed, or re-gravel gravel driveways.

Back Yard

- Remove any extra items from the yard, such as tools, piles of lumber or auto parts. Children's toys should all go in one area in the back yard.

Preferred Products

- **Folex** - Instant spot carpet remover. Perfect for rust, red wine or pet accidents. Available at Lowe's or Bed, Bath & Beyond.
- **Polyshades by Minwax** - Brightens all wood cabinets in the home (kitchen, bath etc.)

Preferred Vendors

- **Storage** - *PODS (ask for the RE/MAX discount), 866.229.4120*
- **Carpet & tile** - *University Flooring, 704.921.7673*
- **Carpet cleaning** - *White Knight Steamers, 704.821.5512*
- **House cleaning** - *Hill's Cleaning Service, 704.545.6058*
- **Repair** - *Shelby Tyding, 704.699.7714 or Danny Kiser, 704.634.8028*

