



CLOSING MANAGEMENT – CORE SERVICES QUESTIONNAIRE

The information below is **required 3 days prior to your scheduled Closing Management – Core Services Kick Off call** so we can determine how best to help you manage your closings.

Please complete the following information and return to your Key Assistant.

Client Information

- 1. First Name: _____
- 2. Last Name: _____
- 3. Company/Team Name: _____
- 4. Contact Phone: _____
- 5. Email: _____

Business Overview

Last Year's Information		This Year's Information	
Total transactions/deals:	\$ _____		\$ _____
Average sales price:	\$ _____		\$ _____
Total GCI:	\$ _____		\$ _____

Estimated listings taken (not sold but taken): _____

Estimated % split of seller vs. buyer deals: _____ %/ _____ %

Are you wanting Listings, Closings or Both? _____

Client - Closed and Database

Confirmation of main database used for Clients and status of Listing and Closing Management in database.

Get 100% accurate for previous year and current YTD for Client - Closed - YEAR as in Client - Closed 2013, and Client - Closed 2014. Each record must also have Client-A, Client-B, Client-C rating, a Client-Buyer or Client-Seller tag to tell us the deal type, proper Source field completed, full contact information, and updated notes on original source of lead and future business and referral sources.

For most databases, the Closings records should be accurate for current YTD always within one week of closing including sales price and commission amounts.



Listing Management

The following questions are related to Listings. If you are only needing Closings, please skip this section and continue to the Closings section.

1. About how many new listings per month during busy season? _____
2. How many listings do you currently have in inventory? _____
3. Who is doing Listing Management? _____

4. About how many hours for one listing? _____
5. Will we have access to your MLS? _____ If so, will Best Agent Business have to limit the access to the MLS database to specific time of day (what timeframe would be preferred?)

6. Will we be posting your listings on the MLS for you? _____
7. Where are your current listings posted? _____

8. How are your listings currently being posted to these locations? Please notate auto syndication, manual posting, or a combination of both methods. _____
9. Where are your photos stored or uploaded? _____
10. How many photos are usually utilized for each property? _____
11. Do you want Listing Management to utilize any special captions or descriptions? _____

12. What program do you currently utilize to track your listings? Top Producer is one example.

13. Do you currently utilize a showing, scheduling, or feedback site? Example: www.Showings.com. If not, would you be interested in adding this option to your Listing Management Plan? _____
14. Do you have a current Listings process checklist? _____ If not, would you like one? _____
15. Do you want us to either document a system or take over some or all of this function? _____

16. Any wish list items to improve Listing Management? _____

Buyer Management

1. Estimated number of buyer first meetings last year? _____
2. Are you able to produce a report of all buyer first meetings and results from last year? _____
(If not, we can put system in place to make that happen.)
3. Estimated conversion rate of first meeting to closed buyer? _____ %
(For example, out of 10 buyer first meetings, how many end up closing? If 5 of 10 close, that is a 50% conversion rate.)
4. If you think that percentage is different for you versus your buyer's agents, please detail estimates. _____

5. Do you get buyers pre-approved before showing and if so, who is your lender and working relationship and flow? _____

Closing Management

The following questions are related to Closings. If you are only interested in Listings, please skip this section.

1. About how many closings per month during busy season? _____
2. Who is currently managing your Closings? If you have an in-house assistant, please provide email and phone number. _____
3. About how many hours for one closing? _____
4. If person doing Closing Management is some other local or virtual assistant and you are paying on a per closing or per file basis, how much are you paying per closing? (For example, \$200, \$300, \$400?) \$ _____
5. What database do you currently use for managing your Closings? Please email logins. _____

6. Do you utilize an MLS/MRIS system? If yes, does Best Agent Business need assistant logins to access MLS/MRIS? _____

7. Do you have a current Closing process checklist? _____ If not, would you like one? _____
8. Do you want us to create system or take over some or all of Closing Management functions?

9. How involved do you want your Closing Assistant to be in your closings? Minor, Medium or Full (Refer to descriptions below.) _____
- **Minor Involvement:** I want to handle most of the closing, but I'd like my Closing Assistant to take some of the tasks off my plate.
 - **Medium Involvement:** I want my Closing Assistant to take more than half of the closings work off my plate. I'd like them to be in contact with the closing parties and make sure the closing is moving forward, but I want everything to run through me.
 - **Full Involvement:** I'd like my Closing Assistant to handle as much of the closing as possible, from start to finish. I want minimal involvement and would prefer that all closing details go through my Closing Assistant.
- Please expand on your answer from above. List any specific tasks you'd like your Closing Assistant to take over. _____

10. What do you do during the under-contract and post-closing period to enhance Client Service and increase short-term and long-term referrals? _____

11. What would you like to add and start to do in future? _____

12. If service is top-notch, out of 10 client closings, how many total referrals do you think you should be able to get by Day 100 from those 10 clients that would lead to a first meeting with a buyer or seller lead within a few months? _____



Wish List

What are your top 3 wish list items to Focus Unique Talent, Delegate Everything Else, and Stop Wasting Leads related to these topics?

- 1. _____
- 2. _____
- 3. _____

Thank you for taking the time to fill out this questionnaire. Your answers will help us determine the best way to help you manage your closings.