



CLOSING MANAGEMENT QUESTIONNAIRE

The information below is **required 3 days prior to your scheduled Closing Management 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. Brokerage: _____
- 5. **Company Address**
Street: _____
City: _____ State: _____ Zip: _____
- 6. **Brokerage Address**
Street: _____
City: _____ State: _____ Zip: _____
- 7. Company Phone: _____
- 8. Brokerage Phone: _____
- 9. Cell Phone: _____
- 10. Fax: _____
- 11. Email: _____
- 12. Signature Line – Please provide your signature line as you’d like it to appear in emails. _____
- 13. Tagline/Slogan – Provide any taglines or slogans for your business as you’d like it to appear in emails. _____

- Transaction Goal for the Current Year: _____
- Transaction Year-to-Date: _____
- Closings in the Previous Calendar Year: _____
- Current Listing Inventory: _____
- Current Closing Inventory: _____

Closing Management Goals

We've found many agents get overwhelmed during this process and it's best to start with 3 goals to achieve and then expand upon those.

What are your top three wish list services you would like to have the Closing Management Team Accomplish?

1. _____
2. _____
3. _____

Please answer the following questions and provide logins and passwords where applicable.

Software and Systems

1. What database do you currently use for managing your closings? Please provide login credentials.

Database: _____
Login: _____
Password: _____

Database: _____
Login: _____
Password: _____

2. Where do you store files, property photos, etc. (Dropbox, Cloud, Google Drive, etc.)?

Database: _____
Login: _____
Password: _____

Database: _____
Login: _____
Password: _____

3. Who is currently managing your closings? _____

If you have an in-house assistant, please provide name, email and phone number.

Name: _____
Email: _____
Phone: _____

4. Do you utilize an MLS/MRIS system? If yes, does Best Agent Business need assistant logins to access MLS/MRIS? If so, please provide login credentials.

Database: _____
Login: _____
Password: _____

Database: _____
Login: _____
Password: _____

5. Will Best Agent Business have to limit access to the MLS/MRIS system to a specific time of day? If yes, what time frame(s)? _____

Full or Partial Closing Management:

1. How involved do you want your Closing Management Assistant to be in your closings? Please check one of the below choices.

Minor Involvement – I want to handle most of the closing, but I'd like my Closing Management Assistant to take some of the tasks off my plate.

Medium Involvement – I want my Closing Management 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'll still be in touch with my buyer/seller and involved in the process.

Full Involvement - I'd like my Closing Management 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 Management Assistant.

2. Please expand on you answer Minor, Medium or Full Involvement from Question #5. List any specific tasks you'd like your Closing Management Assistant to take over. _____

3. Do you want your Closing Management Assistant to communicate mainly through email, phone or a combination of both? Phone Email Both

In what circumstances would you require phone calls? _____



4. Do you want your Closing Management Assistant to handle urgent issues and problems that come up with your closings? Yes No

5. What response time do you require from your Closing Assistant? _____

(Please note Best Agent Business company’s policy is a response within 1 business day, though Closing Management Assistants strive to provide a response time as close to your requirements as possible.)

6. How many hours a week do you plan to budget for Closing Management? _____

General Questions:

1. Do you have email templates set up for contact with closing parties?
 Yes No

2. Do you have closing plans or checklists already in place to help you manage closings?
 Yes No

3. When would you like your Closing Management Assistant to begin handling your closings?

4. Are there any other Closing Management tasks we might help you with at this time?

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.