



Sales & Marketing Proposal

123 Sample St
Hometown, CA 12345



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Executive Summary

This plan is designed to launch your home with maximum impact by combining strategic preparation, premium presentation, and targeted marketing proven to attract qualified luxury buyers in the area. Optional enhancements like staging, updated inspections, and advanced media allow us to elevate the home's presentation and broaden its appeal to both entertainers and families while showcasing the property's strongest features.

A multi-channel marketing approach—encompassing MLS distribution, high-quality photography, digital advertising, retargeting, mailers, social media, and optional premium print placements—ensures the home reaches the widest possible audience. For sellers who want an even stronger presence, optional video services such as twilight cinematics, aerial footage, and a hosted walkthrough help differentiate the home online and generate deeper emotional engagement from buyers during their initial search phase.

Throughout the process, I personally manage all preparation, scheduling, contractor access, inspections, disclosures, showings, and weekly reporting. This ensures consistent presentation, controlled access, clear communication, and a seamless path from pre-market readiness through negotiation and closing.

Our pricing strategy is grounded in the CMA and a clear understanding of current market conditions: limited high-quality comps, buyer sensitivity at the \$2M+ level, and the home's prior performance on the MLS. Listing slightly above market value provides room to negotiate, positions the home competitively, and allows us to evaluate early interest before making adjustments. Your flexibility by not being in a rush to sell allows us to pursue this strategy which will also minimize disruption, which was a priority of yours.

The full details of the available service tiers and final listing fee appear at the end of this proposal, giving you flexibility to choose the preparation and marketing level that best aligns with your goals.



Preparation Plan

Background:

This home was previously listed on the MLS in 2024 and was an off-market listing thereafter, so the home is already well prepared for the market. Several inspections have already been completed as recently as 2024 and a detailed file of inspections and work to the property has been prepared. The home itself is in excellent condition and very little updating is needed to prepare the home for the market.

Inspections & Disclosures

All statutory disclosures, such as the Transfer Disclosure Statement, Seller Property Questionnaire and NHD Disclosures will need to be updated and a new preliminary title report will need to be prepared. All historical inspection reports and disclosures from the previous listing, the purchase and any repairs, enhancements or improvements should be made available for disclosure digitally.

The following new inspections should be scheduled and conducted:

- **General Home Inspection**
- **WDO (Termite) Inspection**

Buyers will expect updated inspections of these systems. A roof and chimney inspection could also make sense if there are any red flags or areas of ambiguity with the historical inspections, or if the general home inspection recommends a roof inspection be conducted.

OPTIONAL: The cost of these inspections will be covered by the Concierge Package. If that package is not selected, seller may choose whether or not to conduct the inspections and will be responsible for payment.



Repairs, Updates & Improvements

The home is very near market ready and could easily list right now without any repairs or improvements beyond anything that may come up in the inspection reports. My only suggestions are as follows:

- Light landscaping work such as adding more colorful rocks or mulch to enhance color in the backyard and curb appeal.
- Removal of chandelier from guest bedroom and replace with either recessed lights or a more modern, more flat light fixture such as the ones in the bonus space or the one in the home office. This change will make the room feel a little less ornate and more appealing to prospective buyers as a secondary bedroom. The current fixture is very large and makes the room feel considerably smaller. It is also recommended that the 4 post bed be replaced with a smaller full size bed for similar reasons.
- I recommend considering the removal of the chairlift to help buyers better envision the space. While the chairlift may potentially be an attractive feature to older buyers, it may detract from the space and counter the goal of de-personalization for others.

Timelines & Service Providers

The landscaping work and swapping out the light fixture and/or the bed should be done as soon as practicable.

Upon signing of the listing agreement I will take possession of the historical disclosures and digitize them. I will also order a new preliminary title report and NHD report from the title company and disclosure company of your choice – I will provide recommendations - and a presale escrow will be opened.

Inspections will then be ordered and scheduled at your convenience. If you are traveling I can provide the inspectors full access as needed to complete their inspections. I will provide you with recommendations and options for inspectors.



Presentation Plan

The home is presently in excellent condition and shows extremely well. The goal is to take an excellent home and showcase it in a way that tells a story to prospective buyers while also preserving the utility of the home since it will continue to be occupied while on the market.

The primary selling point of the house is as a place for entertaining. In particular, the area off the entrance and the decks and the multiple outdoor areas. All of those areas need to be showcased at the highest level possible to demonstrate the versatility of the property and all of the places available for entertaining.

The current setup has some limitations. The home presently is not setup to showcase its utility for families. The home is marketed as a 4 bedroom home but only shows 2 traditional bedrooms as one was converted into an office and the other is part of a larger, open bonus space. The bonus space is largely left to the imagination of the buyer and doesn't have a clear theme,

To properly showcase the home for buyers, I recommend light staging, starting with a staging consultation aimed at the following:

- Maximizing all of the entertaining spaces so that they are properly showcased.
- Creating a concept to take advantage of the bonus space.
- Making the space appear more palatable to families.

Staging would start with a walkthrough of the space and a staging plan will be created with the goal of enhancing the space with a minimal footprint on utility. Installation would occur shortly before photography is scheduled and the listing goes live.

I will also provide a detailed "ready to show" checklist shortly before listing to help you keep the space ready for showings.

OPTIONAL: Staging consultation and staging are included in the Concierge Package.



Professional Photography & Videography

Professional photography and videography is the centerpiece of our marketing plan and the best way to showcase the house across all platforms where we may find the right buyer.

To properly showcase this home, aerial and twilight photography will be performed in addition to photography during the day. We will also take advantage of videography, including vertical videos for social media and a virtual tour video. Here is a list of all of the professional photography and videography services:

- Daylight Photography
- Twilight Photography
- Aerial Photography
- Flyover video showcasing home and surrounding area
- Virtual tour video
- Vertical video for social media
- Hosted showcase video with me
- Matterport Virtual Tour and/or Zillow Showcase*

*Both of these services are included. Some sellers are sensitive about privacy concerns, so the Matterport can be put in a protected area on the single property website. If privacy is a primary concern, it is recommended to skip Zillow showcase.

The twilight photography in particular will showcase how the home looks in the evening, when most entertaining events will take place. I will coordinate a day and time for the regular and aerial photography to showcase the home in its best light. Because of the position of the home, a midafternoon shoot would be optimal.

OPTIONAL: Aerial photography, twilight photography, flyover video, virtual tour and hosted showcase video are included in the Luxury Marketing package. If the Luxury Marketing Package is not selected, some or all these services can be handled on an a la carte basis independent from the listing agreement.



Promotional Plan

Property Overview

This property is a luxury property so our plan will generally target luxury buyers. The home is ideal for entertaining with a 3 car garage and long driveway to accommodate guests combined with relatively easy street parking. The open layout with multiple outdoor areas is ideal for entertaining, and the space in the driveway could be used for parties as well. The foyer of the home is stunning and the flow with the ability to open the living area to the decks with the custom doors and high ceilings is very unique and the home can easily and comfortably host a large party.

The home is situated on a hill and on several levels. Those levels are great for separation of space for parties, but could become more difficult to traverse for homeowners with mobility issues. There are 3 traditional bedrooms (one which is currently being used as an office) and a large bonus space has been added to what was the fourth bedroom. This space has a Murphy bed, an ensuite bathroom and a separate entrance and is currently being used as a studio for business. It presents many opportunities – a kitchen can be added to make it a large in-law unit where a grown child or relative could stay, it could be an entertainment area or continue in its regular function. The primary bedroom is nice with its own fireplace and bathroom with walk-in closet, separate shower and oversized tub, but some of the fixtures in the bathroom are dated and it could use a cosmetic upgrade.

The home features beautifully landscaped grounds on a hilly lot. There is no pool, nor is there a logical place to put one. There's also no outdoor kitchen. All of the finishes in the home are high end and tailored to a premium buyer. The home does not have any signature views, nor is it walking distance from downtown or in a resort setting, but it is in a sought after area with top rated schools.

Target Buyer

Based upon how the home has been updated, the target buyer is someone who will value the ability to entertain and hold parties. Because it does lack several of the features that families at this price point in the area seek, such as a pool and a large, flat yard and because of the high end features, this home could be ideal as a retirement home or a second home for people who love the area and frequently have guests, but



don't need to be part of a country club. Because of the entertaining space and the bonus area, it could be attractive to corporate buyers looking for a place to house clients or throw parties.

Even though the home hasn't been designed for families, a young family did live there, and there are features attractive to families, primarily the schools. Families with older kids could utilize the bonus area as a kids area, or could potentially rent it out for additional income. Not all families want or need a pool, and the space in the driveway area could be utilized as a play area for kids. It could also be a second home for families too.

Our marketing mix needs to be broad and focused both locally, with most local attention on families, and across the state, primarily focused on the Bay Area to target prospective buyers there. Our targeting should begin in the neighborhood and expand from there.

Marketing Mix

1) MLS Listing

- The home will be listing on the MLS and distributed to all syndicated search websites.

2) Single Property Website

- A website will be created with a custom URL to the property
- The website will feature enhanced photos and information compared to what's available on the MLS and will be where all internet ads are directed.
- If we do a Matterport, it would be housed on the website.

3) Paid Digital Advertising

- Listing ads will be featured on Facebook, Instagram and YouTube.
- Display Network Ads will be featured on Google and will be used to build awareness in targeted areas.
- Users with demonstrated interest will be retargeted.



4) Organic Social Media

- Listing photos and videos will be displayed on my social media and on eXp's social media.
- These organic posts will be boosted to increase reach in targeted areas.

5) Just Listed Mailers to Neighbors and Targeted Prospects

- Mailers will be created and sent announcing the home as just listed with trackable QR codes to measure interest.
- Neighbors will primarily be targeted so they can help get the word out to interested parties.

6) Signage with Flyers

- A for sale sign will be placed on the property with a do not disturb occupants rider.
- The sign will be stocked with flyers with more information about the property and QR codes.

7) Ad Placements in local and regional publications

- Prominent print ads will be placed in a local magazine with the goal of attracting local interest, and in a regional which is targeted to buyers in an area where many luxury buyers in this area come from. These ads will feed back to the property's website.

8) Trifold Brochures

- Brochures will be printed and made available to those touring the home.

9) Email and Agent Outreach

- Emails will go out to my database of buyers, many of whom are located in San Francisco and on the Peninsula about the opportunity. I will also reach out to my network of agents to bring attention to the property.

10) Open Houses

- I will hold the house open both days on the opening weekend it's on the market and once a month thereafter on a weekend. One of the open



houses on the opening weekend will be a twilight event. Light catering will be provided to help showcase the property. Lightly catered broker tour is also optional.

11)Disclosures.io

- The disclosure packet will be available online and activity tracked.

NOTE: The services mentioned are included in the Luxury Marketing Package and can be significantly scaled back if the package is not selected.

Process Management

This home will be owner occupied during the sale, though there will be times when the occupants are traveling, which would make the home more available to be shown.

Pre-Market

I will be present for and coordinate all inspections and the staging appointments. I will also advise you on the completion of disclosure documents and any point of sale requirements. I will also be present for all of the photography and will personally select the photos being used in our marketing materials and will be oversee all marketing copy and design.

Showings

A Bluetooth lockbox will be placed on the property in a discreet location with keys to access the property. The lockbox can only be accessed by licensed Realtors. As an additional measure of security, I will require a CBS code to open the lockbox that the buyer's Realtor would need to receive from me.

I will coordinate a calendar for available showing times with you on a weekly basis and make that calendar available for your review online. A minimum of 4 hours advance notice will be required for showings.



Prospective buyers will be screened by me prior to confirming a showing. The buyer's agent will be required to present a valid Buyer-Broker agreement confirming agency representation as well as proof of sufficient funds to purchase the home prior to being confirmed for a showing. For unrepresented buyers, I will require proof of funds and will accompany them to the property.

The Sellers should never be present during showings with prospective buyers or open houses.

Communication with Prospective Buyers and Agents

I will directly handle all communications with prospective buyers and their agents. If there are questions for which I don't know the answer, I will contact you or the appropriate professional to get the answer. I will also handle all direct negotiations and receive all offers.

Offers

Unless instructed otherwise, I will promptly present all offers as written and will vet the offers by performing due diligence on the buyers.

Escrow

Once the property is in escrow, I will be the first point of contact and negotiate any issues that arise. I will present and update a timeline of events and deadlines that occur and keep you updated on the progress.

I will also coordinate with you from a scheduling standpoint to facilitate access to the property as necessary for inspections, an appraisal or buyer's informational access to the property and be present for all such events.

I will be the first point of contact and negotiate according to your instructions with the buyer on any issues that may arise. I will also facilitate with the title and escrow officer the signing of required documents and the transfer of keys upon closing.



Reporting

Prior to the property going on market, I will provide a timeline of all events and keep you updated as all those events are completed.

While the property is on the market, I will provide weekly written reports on the progress of the listing, which will include details on showings, the number of disclosure packages reviewed and statistics related to our advertising, such as views.

During escrow, I will advise on the contractual deadlines and promptly report any issues.

Pricing Strategy

CMA Results

Attached is a comparative market analysis of the value of the home. Based upon a review of comparable properties, my assessment of the current market value of the property is **\$2,550,000**.

There have been a limited number of comps sold recently of the same relative size and property type in the immediate vicinity of the subject property, with one selling recently for \$2,200,000. That home is approximately 1100 square feet smaller than the subject, but had desirable features including a flat lot and a pool and was built 10 years after the subject. Several other homes in a nearby neighborhood recently sold and are good comps, though newer and in a slightly more desirable location.

Notably, there was a retroactive appraisal on the subject that was completed as of late 2022 which appraised the subject's value at \$2,750,000, but that was in a market that strongly favored sellers, and it also gave substantial weight to a home sold at the country club at the time, which I would not consider a comp. Additionally, this home was listed on the MLS at \$2,795,000 for over 90 days and received no offers and only a handful of showings, suggesting that the price was above market value.



Local Market Trends

The market in the area right now is neutral and leans toward favoring buyers, especially at higher price points. The sales to list ratio on all homes sold in January was 96%, indicating that the average home is selling slightly below the list price. The median days to sell in January was 58, suggesting homes are staying on the market longer. Homes at the \$2M price point and above performed worse against list price coming in at 93.9% of list price.

Strategy

Given the data that buyers are not honoring list prices, especially at higher price points and the lengthy days on market, an above the market strategy makes sense, particularly considering that there is not any urgency to sell. This strategy provides a pathway for price reductions, if necessary and leaves room to negotiate.

Given the lack of interest at \$2,795,000, my recommended list price is **\$2,699,000**. That represents a healthy price reduction of almost 3.5%, but still puts it almost 6% above the market, which is in line with where many properties in this category are listed.

Evaluating interest and data should be done over the first month of this listing prior to considering any price adjustments. In my opinion, a lower list price would invite lowball offers outside of a zone of possible agreement based upon the lack of direct comps to the subject and the trends of the market.



Listing Fees

Standard Listing Fee

2.5%

Includes

- Representation services at all stages of the transaction.
- Basic professional photography

+ Luxury Marketing Package

+0.5%

Includes

- Enhanced photography and videography
 - Aerial
 - Twilight
 - Showcase Videos
- Enhanced digital advertising
 - Geotargeting
 - Longer Ad Run, Higher Budget
- Print Advertising in Napa Valley Life and Gentry Magazines
- Upgraded Printed Materials
- Light catering for open houses

+ Concierge Package

+0.5%

Includes

- Home and Pest Inspection fees paid
- Staging Consult and targeted staging for 2 months.

- Credit for Selecting Both Luxury & Concierge

-0.25%

TOTAL LISTING FEE: 3.25%

Top Dollar Guarantee: If the final sale price is below **\$2,600,000**, I credit **\$800 for each full percentage point** below that amount. This guarantee applies only when both the Luxury Marketing and Concierge Packages are selected. If one package is declined, the guarantee adjusts to \$2,550,000; if both are declined, the property is not eligible for the guarantee.