

Seller Qualification Checklist

Qualify the person before the property. Every box must check out — one fail = NON-VIABLE.

Weave these into conversation — never read them as a list. Sellers feel interrogated by checklists. Tag the answers mentally, then document after the call.

1. OWNERSHIP & DECISION-MAKERS

- ☐ Seller is on title (or holds verified POA)
- ☐ Every other owner — spouse, family, partner — is aligned on selling
- ☐ No unresolved probate, divorce without judgment, or pending tax sale
"Still in my dad's name, he passed last year" = DQ until probate is done.

2. MOTIVATION — THE BIG WHY

- ☐ A real driver is on the table: divorce, financial pressure, relocation, inherited property, tired landlord, life event
- ☐ The cost of NOT solving it is concrete — they can tell you what happens if this drags on
- ☒ "Just curious what it's worth" — no motivation, no lead. DQ.

3. TIMELINE

- ☐ A 45-60 business day close (about 9-12 weeks) works for their situation
- ☒ Needs cash in under 30 days — refer to a cash/wholesale operator. DQ.
- ☒ Wants full retail and is fine with six months on market — refer to a traditional agent. DQ.

4. PROGRAM FIT

- ☐ Open to the listing / service-pro model — property lists on the MLS with a top-tier agent
- ☐ Not already under an exclusive listing agreement
- ☐ Reasonable to work with — respectful, responsive, decision-ready
Hostile sellers and cash-discount shoppers are noise, not leads. Kill fast, stay polite, never burn a bridge.

5. CAPTURE BEFORE YOU HANG UP

FIRST ASKING PRICE _____ SECOND ASKING PRICE _____

TIMELINE _____ MOTIVATION (HIGH / MED / LOW) _____

WIRING TAG (CHOLERIC / MELANCHOLY / PHLEGMATIC / SANGUINE) _____

DISPOSITION — PICK EXACTLY ONE

BUCKET	WHAT IT MEANS	NEXT MOVE
HOT	Motivated, realistic on price, passes every gate, 45-60 day timeline works	Same-day handoff to Closer. Appointment inside 48 hrs.
WARM	Some motivation, 90+ day timeline, or still weighing options	Stays with LM. 3-5 touches over 30 days. Reassess every touch.
NURTURE	Ownership clear, could fit later — 6-18 months out	Drip + quarterly call. Re-qualify every 90 days.
NON-VIABLE	Fails any gate above. Not a lead — noise.	Mark dead in CRM with reason code. Fast, polite goodbye.

A lead is either a pass or a fail — there is no score.

If any one check fails, the lead is NON-VIABLE for RetailMax — even if the seller is nice, the neighborhood is hot, or you feel like there's something there. That discipline protects the Closer's calendar and the close rate.