

These are the tasks that need your licence, your judgement or your face. Everything not on this list can be handed to someone else — that is the whole point of the list being this short.

LEADS

- ☐ Qualify new leads and set follow-up strategy
- ☐ Meet with sellers and buyers to build trust
- ☐ Handle objections and pricing conversations
- ☐ Screen and pre-qualify serious buyers before showings

CLIENT EXPERIENCE

- ☐ Host and personally attend client appreciation events (if applicable)
- ☐ Deliver weekly pricing and marketing updates to sellers

LISTINGS

- ☐ Deliver listing presentation and set price
- ☐ Decide staging strategy with the seller
- ☐ Walk the property to note upgrades and issues

MARKETING

- ☐ Approve final marketing materials and messaging

SHOWINGS

- ☐ Conduct private showings for serious buyers

CONTRACT

- ☐ Negotiate offers and contract terms
- ☐ Advise client on offer strategy
- ☐ Negotiate repair requests after inspection

CLOSING

- ☐ Attend closing and final walkthrough

BUSINESS DEVELOPMENT

- ☐ Develop and refine personal brand and value proposition
- ☐ Build and maintain a professional network (lenders, inspectors, contractors)
- ☐ Complete continuing education and license renewal requirements

