

# OPPORTUNITY PIPELINE

SELLERS

CULTIVATE		APPOINTMENT		ACTIVE		UNDER CONTRACT		CLOSED	
<b>Watch</b>	Interview Setup Auto Nurture* Added Neighborhood Watch Setup Quarterly SmartPlan Birthday(s) SmartPlan	<b>Pre-Listing</b>	Sent Prelisting Packet Confirmed Appointment CMA Created Leave Behind	<b>Showing</b>	Checked Realtor, Zillow and KW Setup Auto Reports Advertising Showing Time Sentry Lock Feedback Weekly Reports Updated CMA Open House	<b>Under Contract</b>	Collected Earnest Money Deliver Signed Contract Subject to Sale/Close form Home Warranty Changed Status <b>Compliance</b>	<b>Closed</b>	<b>Compliance</b> Commissions Final CD
	<b>Nurture</b>		Confirmed Receiving Nurture Added Time Frame Home Visit (early) Qualify for Next Home* Call with Possible Listing*		<b>Staging</b>		Measured Photos / V-Tour Created Brochures Copies to Seller		<b>Contingencies</b>
<b>HOT</b>	Called for Updates on Nurture Sent Text for Updates Called With Possible Listings* Sent Market Updates	<b>Listing</b>	Presented Listing Info Signed Contract Signed & Lockbox <b>Compliance</b>	<b>Negotiations</b>	Contract To Seller Negotiated Signed Contract	<b>Finals</b>	Client Picture Picked up Sign and Lockbox Closing Statement Utilities Compliance Gift?	<b>Lost</b>	Return of Earnest Pickup Sign and Lockbox Thank You Card

\* If Buying too

OPPORTUNITY PIPELINE

BUYERS

CULTIVATE		APPOINTMENT		ACTIVE		UNDER CONTRACT		CLOSED						
<b>Watch</b>	Interviewed Auto Nurture Add Neighborhood Watch Setup Quarterly SmartPlan Birthday(s) SmartPlan	<b>Pre-Showing</b>	Confirmed Availability Sent Buyers Packet Confirmed Appointment	<b>Offer</b>	Wrote Offer Inspection Timelines Closing Costs Submitted Offer	<b>Under Contract</b>	Delivered Signed Contract Delivered Earnest Money Ordered Inspections Home Warranty <b>Compliance</b> Go Over Timeline	<b>Closed</b>	<b>Compliance</b> Final CD Closing Check Gift?					
	<b>Nurture</b>		Buyer's Presentation Confirmed Nurture Working Get PreApproval Sent Listings Called with Possible Listing		<b>Kept</b>		Sent Review of Homes Seen CMA for Hot Property Adjusted Search		<b>Negotiations</b>	Got Signatures	<b>Contingencies</b>	Repairs Termite Inspection Title Appraisal Loan Commitment Repairs Completed Property Insurance Repair Receipts Home Warranty?	<b>CLOSED Complete</b>	Updated Nurture Add Aniv Date Thank You Card Commissions Social Post
			<b>HOT</b>				Called for Updates on Nurture Texted Checkin/Update Called With Possible Listings Sent Market Updates Updated on Seen Listings Buyer Representation/Agency Sent Dos and Don'ts					<b>Offer Rejected</b>		Rejected Offer Signed