

# Client Care Checklist: Delivering Exceptional Service

This checklist is designed to help you provide a stellar client experience, from the first meeting to post-transaction follow-ups. Use this guide to ensure every client feels valued, supported, and confident in their real estate journey.

## 1. Initial Contact and Consultation

- Respond to inquiries promptly (within 1 hour if possible).
- Provide a welcoming and professional first impression.
- Discuss client goals, timeline, and expectations.
- Explain your services and value proposition.

## 2. Property Search and Showing

- Curate a personalized list of properties based on client preferences.
- Schedule showings promptly and efficiently.
- Provide a comparative market analysis (CMA) for properties of interest.
- Offer honest and professional insights during showings.

## 3. Negotiation and Offer Process

- Explain the offer process clearly to clients.
- Provide expert advice on competitive yet fair offer strategies.
- Communicate effectively with the other agent to facilitate smooth negotiations.
- Keep the client informed at every step of the process.

## 4. Closing and Follow-Up

- Coordinate with all parties (lender, lawyer, inspector) to ensure a smooth closing.
- Attend the final walkthrough with the client.
- Deliver a closing gift as a token of appreciation.

- Follow up 1 week, 1 month, and 6 months post-closing to check in.

## 5. Post-Transaction Relationship Building

- Request a testimonial or online review.
- Send personalized greetings for birthdays or holidays.
- Invite clients to exclusive client appreciation events.
- Periodically provide market updates and valuable tips.

Let's Make Your Next Move a *Positive* One!

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