AGENT MEETING HANDOUT

Your Seller Service Action Plan

Choose one listing. Leave the meeting with an action and a date.

Agent / property or practice case

Make your work visible. Send a written update and speak with the seller every week, including quiet weeks. Explain what happened and what you recommend next.

Set the communication schedule

Weekly update day / time / method

Next market and strategy review date / listing expiration date

Use the six-month blueprint

Phase	Focus while actively marketed
Before launch	Agree on goals, preparation, pricing, services, costs and access.
Month 1	Launch, verify the listing and review the first buyer response.
Month 2	Improve response and remove access or presentation problems.
Month 3	Refresh the property story and complete a full strategy review.
Month 4	Keep exposure relevant to the season and current competition.
Month 5	Reassess seller priorities, costs and current positioning.
Month 6	Decide the next course before the actual agreement expires.

The six months are a planning horizon, not a predicted selling time or an extension of the agreement. Start expiration discussions earlier when needed; shift to the closing plan when an offer is accepted.

One service improvement / person responsible / due date

TRAINING EVERY TUESDAY
10:00 AM Eastern on Zoom
New and experienced agents should attend.
BobLatigonaTraining.com for previous class recordings.

REUSABLE AGENT WORKSHEET

Your Weekly Seller Update

Complete this summary, discuss it with the seller and save the agreed next steps.

Property / reporting dates / next scheduled seller conversation

Activity	This period	Previous period
Relevant inquiries	_____	_____
Showing requests / completed visits	_____ / _____	_____ / _____
Requests not accommodated	_____	_____
Repeat visits or interest / written offers	_____ / _____	_____ / _____

Work completed and evidence (links, outreach, follow-up or campaign results)

Actual feedback and market changes (note any feedback still outstanding)

My recommendation and the seller's decision or approval

Next action / person responsible / due date / next review date

Before you finish the weekly review

- ☐ Explain the response, including a quiet week; do not report only views or clicks.
- ☐ Check access, current competition and whether the agreed work was completed.
- ☐ Confirm the expiration date and the next strategy meeting; begin extension planning early.
- ☐ Record the decision and any required approval. Communicate urgent developments promptly.

If an extension is approaching: Bring the record of service, current CMA, buyer response and a specific plan for the next period. Obtain the appropriate written agreement before continuing beyond the authorized term.

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Previous class recordings: **BobLatigonaTraining.com**