MONTHLY FACE-TO-FACE MEETING | 1 OF 3

Monthly Seller Meeting

Schedule a face-to-face review each month while actively marketed. Suggested time: 30-45 minutes.

Property address

Month / review period

Seller name(s)

Agent

Meeting date and time

Meeting location

Bring to the meeting

- ☐ Updated, dated CMA and supporting MLS sheets
- ☐ Marketing examples, results and spending
- ☐ Next 30-day marketing and service plan
- ☐ Updated estimated net sheet if relevant
- ☐ Weekly reports, showing totals and feedback
- ☐ New competition and any tour comparisons
- ☐ Agreement end date and upcoming review dates
- ☐ Seller-provided carrying costs if relevant

Guide the conversation

1. **Seller priorities:** Has the move date, motivation or situation changed?
2. **Service delivered:** What did we promise, complete and learn?
3. **Buyer response:** What do inquiries, visits and feedback tell us?
4. **Current market:** Review the CMA and the homes buyers can choose.
5. **Choices:** Discuss price, condition, access, marketing and costs.
6. **Agreement:** Confirm next actions, approvals and the next meeting.

Monthly results / trends versus last month / services completed or still outstanding

Seller’s current priorities, questions and concerns

Service feedback: What should we keep doing or improve?

MONTHLY FACE-TO-FACE MEETING | 2 OF 3

Review the Updated CMA

Show the evidence, explain meaningful differences and distinguish asking prices from completed sales.

Property address

CMA prepared / reviewed date

Current asking price

Days on market / as-of date

Bring the full CMA. Review relevant active, pending and recently sold homes. Select comparables by relevance; explain any search beyond the weekly three-mile competition review.

Address / MLS #	Status	Price / type	DOM	Important differences / meaning

Label prices as asking or closed sale. Do not assume pending sale prices; attach dated source sheets.

What has changed since the last review? Competition, response, condition or seller timing

Agent recommendation and evidence: price, presentation, access or marketing changes

Recommended asking price / keep current

Follow-up date to evaluate response

Seller’s response / decision / questions to resolve before approval

Use dated net / cost estimates with clear assumptions. Obtain required price-change approval separately.

MONTHLY FACE-TO-FACE MEETING | 3 OF 3

Agree on the Next 30 Days

Leave with a written plan that identifies the work, who will complete it and when results will be reviewed.

Property address

Plan dates from / to

Priority for the next month / what response or progress we will evaluate

Choose the changes to discuss

- ☐ Pricing / positioning
- ☐ Condition / preparation
- ☐ Media / marketing / outreach
- ☐ Showing access / availability

Action / intended result	Responsible person	Due date

Approvals and costs: service / payer / approved limit / authorization reference / open questions

Listing agreement expiration date

Strategy / extension decision meeting

Next weekly phone call

Next monthly face-to-face meeting

- ☐ Send the seller a written recap of decisions and next steps.
- ☐ Save the meeting summary, CMA and required approvals in Dotloop / the transaction record.
- ☐ Calendar follow-up dates and address urgent developments before the next scheduled review.

Confirm seller approval through the appropriate process before changing price, ordering additional paid services or extending the listing. If an offer is accepted, shift the plan to transaction and closing milestones.