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.