



## Real Estate Sales Professional Expectation Checklist

Use this checklist with every buyer to set proper expectations, build trust, and maximize chances for successful closings.

### BUYER CHECKLIST

#### 1. BIG PICTURE — Make these commitments

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- Always take the time to get to know your buyer — understand their true motivation, timeline, and emotional drivers
- Know the local market at expert level — be prepared to advise, not just show
- Deliver confidence and clarity through every step of the process, it's all about their objectives
- Only write offers when the buyer is serious about the property
- Only write offers when the buyer is qualified to purchase the property
- Identify DISC behavioral style for each buyer and adjust your communication approach accordingly
- Understand your value in solving their challenges, articulate this value, and expect a commitment in return
- Document buyer's core 'why' — revisit this during moments of doubt or remorse

#### 2. BUYER CONSULTATION (Every Time — No Exceptions)

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- Conduct a formal buyer consultation using the PECVCEP consultation process found at <https://momentorsllc.com/resources/> to differentiate yourself — address buyer fears and DISC-based concerns (offer Zoom option only if cannot be done in person)
- Once you have connected and built value, use the Exclusive Buyer Broker Agreement (EBBA) to determine buyer seriousness before investing significant time
- Ensure buyer has conditional approval with a reputable, vetted lender before showing homes
- Walk through the process: 'I will give you all the information and help you interpret it so you can make a confident, clear decision'
- Set communication expectations: how often will you touch base, how quickly will you respond?

### 3. SETTING EXPECTATIONS — Once Exclusive Buyer Broker Agreement is signed / Before Showings

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- Thoroughly communicate the current buying environment — competition, pricing, speed of market (months supply), interest rates
- Discuss how many homes to show before making a decision: your knowledge of them + your knowledge of the market + their ability to get confident and clear = effective decisions (no need to see every home on the market!)
- Set expectation: there is no perfect home — we are looking for the best match for your goals, B+ to A+ should be considered
- Ask: 'What will you do if we find the right home today?' — confirm readiness to move or what actions need to happen first
- Instruct buyer: No new credit inquiries other than mortgage and no major purchases during the process
- Explain the importance of using trusted third-party providers: inspector, lender, title, insurance, surveyor
- Provide a written timeline of what to expect from offer through closing
- Explain what earnest/binder/deposit money is, pros and cons of different amounts, and what it signals to sellers
- Discuss escalation clauses and when they may be appropriate in competitive situations

### 4. SETTING EXPECTATIONS - WRITING CONTRACTS

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- Walk through the home multiple times before writing the offer
- Review key negotiation points: Price / Terms / Inclusions & Exclusions / Contingencies / Additional Terms
- Explain the value of a large earnest money deposit — signals commitment and seriousness, may get better price
- Explain the value of a shortened inspection period — reduces fall-through risk for seller, may get better price
- Explain the value of minimal contingencies — cleaner path to closing, may get better price
- Explain the value of a clean contract — fewer conditions = stronger offer, may get better price
- Discuss home warranty options and their strategic value in an offer, may reduce disruptiveness of major repair issue
- Review seller's motivation (if known) and tailor offer terms accordingly when appropriate (e.g., flexible closing date)
- Confirm buyer understands all offer terms before signing



- Discuss the risk of writing offers below market value in a competitive environment

## 5. SETTING EXPECTATIONS — At Contract Acceptance

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- Prepare buyer for potential surprises during inspection — normalize the process
- Discuss appraisal issues and available options if appraisal comes in low
- Prepare buyer for typical annoyances during the mortgage process — document requests, underwriting delays
- Be present or available when buyer asks questions of planning/zoning, HOA, etc. — do front legwork to identify the right people for buyer to speak with
- Normalize buyer remorse — reassure that questioning the purchase is normal for many buyers
- Create and follow a detailed transaction timeline — share with all parties and vendors as appropriate
- Avoid language like 'Let's just tie it up and you can cancel' — this indicates the buyer may not be serious enough
- If haven't done yet, introduce buyer to key vendors immediately after acceptance: inspector, insurance agent, title contact
- Send a 'What Happens Next' summary email within 24 hours of contract acceptance – include your timeline
- Schedule check-in calls with buyer to address questions before they become concerns

## 6. REINFORCING THE BUYER'S DECISION

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- Send relevant new data locally, regionally, and nationally to affirm the purchase decision
- Make introductions to help them get involved in the community
- Help them create a vision for what their new home can become
- Stay in touch offering ongoing service so they do not feel overwhelmed