

B.Y.O. (Build Your Own) Buyer & Seller Checklist **Workshop**

01 What's **Covered**

- **Buyer's Checklist** – Covers all stages of the buyer journey:
New Lead, Touring, Under Contract, After Closing
- **Seller's Checklist** – Covers all stages of the seller journey:
Pre-List, Active, Pending, Sold
- Build comprehensive, reusable checklists with every step, action, and milestone needed to complete listings and transactions—tailored to your processes.
- Plug-and-play items that can be easily added to your workflow or task management systems.
- **Learning & Refresher:** Each phase reinforces key steps in the buying and selling process, providing practical knowledge while building your checklists.



02 How It **Works**

- **Duration:** Buyer checklist workshop — 2 hours | Seller checklist workshop — 3 hours.
- **Wrap-Up:** Includes 30 minutes for final Q&A, share resources, and key takeaways.
- **Participants:** Individual or small group (up to 4 agents) for focused attention.
- **Tools:** Checklists are built in Word—simple, flexible, and ready to integrate into your workflow or task management systems.
- **Delivery:** Available in person at your brokerage, at co-working offices I book (no extra charge), or via Zoom.

03 The **Investment**

*Custom packages available for brokerages and/or to create or update **workflows**.

B.Y.O. Checklist	Cost
Buyer's Checklist	\$299
Seller's Checklist	\$399
Bundle: Buyer + Seller Checklists	\$599

04 Small **Print**

- Workshop is non-transferable.
- Offered only to real estate agents (Workshops for real estate assistants will be available in 2026).
- No-shows can be rescheduled; fees are non-refundable.
- Rates are secured once services are booked.
- Payment: Workshops are brokerage-paid, not through escrow.
- If you have an active or pending transaction, you can pay through escrow at closing.
- If you'd like to discuss payment options, just reach out.