A PROPLY PLAYBOOK · FOR AUSTRALIAN AGENTS

The Listing Proposal Playbook

How Australian agents **win the listing** before the agreement is signed.

proply

PROPOSAL-FIRST SELLING

Contents

THE LISTING PROPOSAL PLAYBOOK

Introduction

Most listings aren't won in the room. They're won — or lost — at the kitchen table later that night, when the vendor sits down with their partner and compares what each agent left behind.

That's the uncomfortable truth this playbook is built on. You can give the best presentation of your career, read the vendor perfectly, answer every question — and still lose to an agent who said less but left a clearer document. Because the decision happens after you've gone, and the only version of you still in the room is the one on paper.

This book is about making that version exceptional.

Proposal-first selling is a method where agents structure the listing process around a clear, tailored proposal rather than relying on a traditional slide-based presentation. The proposal becomes the centrepiece of the listing decision — the document the vendor reviews, compares and ultimately chooses from — not an afterthought sent once the meeting is over.

Everything that follows is an argument for that shift, and a practical guide to making it. It is written for Australian listing agents and agency principals — the people who live or die by their conversion rate at the appraisal, and who know that the difference between a good month and a great one is often a handful of listings that could have gone either way.

The research backs the instinct. Vendors consistently choose agents on reputation, trust and clarity of process — not commission — and Australian sellers rank honesty and transparency above technical skill. A structured proposal is the most direct way to demonstrate all of it, in writing, where it keeps working after the meeting ends.

What's inside

The playbook follows the listing the way you do — from the appraisal call to the signed agreement.

Part I makes the case: why presentations fail, how a proposal differs from a presentation, and what proposal-first selling actually changes. Part II covers preparation — what to bring and how to be ready before you walk in.

Part III is the build: what a great proposal includes, how to write one, and what strong examples look like next to weak ones. Part IV is delivery — running the meeting itself. Part V covers the modern edge: where AI genuinely helps, and how the best agents connect their tools into one workflow. The book closes with the fastest way to put all of it into practice.

At the back is the Toolkit — a proposal template, a listing-presentation run-sheet and a pre-listing checklist. These are the working documents. They're designed to be printed, filled in and used.

How to use this playbook

Read it front to back once. It's built to be read in an afternoon, and the parts build on each other.

After that, treat it as a reference. Before your next appraisal, work through the checklist in Part II and the build sequence in Part III. Keep the Toolkit somewhere you'll actually reach for it — the proposal template and run-sheet are the parts you'll use every week.

One idea runs through all of it: the agent who explains their process most clearly wins more often than the agent who simply quotes the lowest fee. Clarity is the whole game. Let's build it.

PART I

Why the Proposal Wins the Listing

Before the templates and the checklists, the mindset. This first part is about a single shift: from treating the proposal as paperwork that follows the meeting, to treating it as the document the whole listing turns on. We start with why strong agents still lose listings they should win, draw the line between a presentation and a proposal, and define what proposal-first selling actually is. Get this part right and everything after it has somewhere to land.

PART I · WHY THE PROPOSAL WINS THE LISTING

CHAPTER 1

Why Most Listing Presentations Fail

Losing a listing to a less experienced agent is one of the more frustrating experiences in real estate. It happens more often than it should — and rarely because the better agent offered a lower commission or a flashier presentation. It happens because they communicated their process more clearly.

Most listing presentation failures aren't caused by a lack of skill or market knowledge. They're caused by structural mistakes that undermine vendor confidence — problems with sequence, emphasis and clarity that experienced agents fall into as easily as new ones. The good news is that every one of these mistakes is preventable, and fixing them doesn't require starting from scratch.

This chapter identifies the most common reasons listing presentations fail and explains specifically what to do differently.

WHAT IS A LISTING PRESENTATION?

A listing presentation is a vendor meeting in which an agent presents their pricing strategy, marketing plan and approach to the listing process — with the goal of demonstrating sufficient expertise and clarity to be appointed as the vendor's agent.

It's the single most important meeting in the agent's sales cycle. Win the listing presentation and you have the opportunity to run a campaign. Lose it and the preparation, the relationship-building and the market knowledge all count for nothing. Understanding why these meetings fail is the foundation for consistently winning them.

Why agents lose listings even with strong experience

Experience creates confidence, which is an asset. It can also create complacency, which isn't. Experienced agents often lose listings not because they lack the ability to win them, but because they've stopped treating every appointment as though the outcome is uncertain.

The patterns are consistent. They show up without a tailored proposal because they've won plenty of listings without one. They skip the opening questions because they assume they know what the vendor wants. They rush the marketing plan because they've explained it a hundred times. And they lose to an agent who did all three things properly — not because that agent was better, but because they were better prepared for this specific appointment.

Trust and honesty are the leading factors vendors weigh when choosing an agent. Both are demonstrated through preparation, specificity and the willingness to have clear conversations — not through experience alone.

The agent whose proposal is sitting on the kitchen table has a significant structural advantage.

MISTAKE 1

Leading with commission

Walking into a listing presentation and establishing your fee before you've established your value is one of the most reliable ways to frame the entire meeting as a negotiation rather than an appointment.

Vendors who hear a commission figure early in the meeting spend the rest of it thinking about whether that number is justified. Every claim you make about your marketing plan and local knowledge is filtered through that lens. The question in their mind shifts from "is this the right agent?" to "is this agent worth what they're charging?"

What to do instead: Save the fee conversation for after the vendor has seen your CMA, understood your marketing strategy and reviewed your proposal. At that point, the commission is a reflection of the value you've just demonstrated. Discussed before that context exists, it's just a number.

Commission isn't the reason you'll win or lose most listings. Vendors consistently place communication skills, market knowledge and responsiveness above cost when choosing who to work with. Lead with those strengths.

MISTAKE 2

A weak or generic marketing plan

Vendors are sophisticated consumers. Most of them have been online, looked at comparable listings and formed a view of what a property marketing campaign should look like. A standard agency package presented without any tailoring to their property reads immediately as effort they didn't receive.

Generic marketing plans are often identifiable by what they don't say. They list portals without recommending a tier or explaining why. They mention photography without addressing what specifically makes this property worth premium visual treatment. They describe "digital marketing" without explaining what that means for this buyer profile in this suburb.

What to do instead: Build the marketing plan around a specific buyer profile. Who is most likely to buy this property, and where do you find them? Every element of the plan — portal strategy, photography brief, copywriting tone, social targeting, open home timing — should flow from that answer. A vendor who can see you've thought specifically about their property is far more likely to trust your judgement on budget and strategy.

MISTAKE 3

Overloading the presentation

More information is not more persuasive. Agents who arrive with forty-page slide decks, fifteen comparable sales and a detailed history of their agency's last decade of results often walk out without the listing — not despite the volume of material, but partly because of it.

Overloaded presentations have two effects. First, they exhaust vendors. By the time you get to the pricing discussion — which is what the vendor came for — their attention is gone. Second, they signal a lack of editorial judgement. An agent who shows everything they know is telling the vendor they don't know what matters most.

What to do instead: Curate ruthlessly. Five well-chosen comparable sales you can clearly explain are more compelling than fifteen that require the vendor to do the analysis themselves. A two-page marketing plan with clear reasoning outperforms a ten-page brochure every time. The discipline of deciding what to leave out is one of the marks of an experienced presenter.

MISTAKE 4

Leaving without a proposal document

This is the most consequential mistake on the list, and the one most agents don't realise they're making.

Vendors rarely decide during the meeting. They decide afterward — often with a partner, a family member or a trusted friend who wasn't present. If you've left without giving them a document that clearly explains your pricing strategy, marketing plan and approach to the campaign, that decision happens without you in the room. The agent whose proposal is sitting on the kitchen table has a significant structural advantage.

A real estate proposal isn't the same as a slide deck or an agency brochure. It's a specific document tailored to this property that sets out exactly how you'll approach the campaign — in enough detail that a vendor who wasn't at the meeting can understand what they'd be signing up for.

What to do instead: Arrive at every listing appointment with a tailored proposal document. Not a template with the address swapped in — a document that reflects the pricing analysis, the specific marketing plan and the communication approach you've built for this property. Leave it with the vendor, or send the digital version within the hour.

Proposal-first selling works because it changes what happens after the meeting. Instead of vendors comparing vague memories of three different agent conversations, they're comparing three different proposals — and the quality of that document reflects the quality of the agent behind it.

In a proposal-first selling workflow, the proposal is not a formality that follows the meeting — it's the centrepiece of it. Agents who treat it that way win a disproportionate share of the listings they present for.

MISTAKE 5

Failing to connect the presentation to a clear next step

A listing presentation that ends with "take your time and we'll be in touch" is a presentation that's handed control of the outcome to the vendor. Most vendors won't follow up proactively. If you don't establish a clear next step before you leave, you're relying on them to do it.

What to do instead: Before you close the meeting, ask whether the vendor has any remaining questions on pricing, marketing or the proposal. Then propose a specific next step — a call the following morning to discuss any questions, or a time to go through the listing agreement if they're ready to move forward. If they're meeting other agents, acknowledge it directly: "I know you may be speaking with a couple of other agents. I'm happy to answer any questions that come up after those meetings — here's the best way to reach me."

A confident close doesn't pressure vendors. It reassures them that there's a clear, organised person ready to run their campaign.

How strong listing presentations actually win listings

The agents who win consistently aren't necessarily the most experienced or the best-known in the area. They're the ones who give vendors the clearest picture of what their campaign will look like and what it will feel like to work with them.

That clarity comes from specific things: a defensible CMA they can walk through clearly, a marketing plan built for this property rather than any property, a proposal document that survives the kitchen-table conversation after the meeting, and a structured presentation that moves with purpose from the vendor's goals to the signed listing agreement.

The fundamentals haven't changed. Vendors choose the agent who makes them feel most confident that their property will be handled well, priced correctly and marketed effectively. Fixing the mistakes above doesn't require a new approach to real estate — just a more disciplined application of the one you already have.

CHAPTER 2

Listing Proposal vs Listing Presentation

Most agents use "listing presentation" and "listing proposal" interchangeably. They're related but distinct — and understanding the difference changes how you approach the listing appointment and what you leave behind.

The confusion is understandable. Both documents relate to the same event: the vendor meeting at which an agent aims to win the listing. But they serve different purposes, operate at different points in the process, and have different impacts on the vendor's decision. Getting clear on what each one is for is the first step to using both effectively.

WHAT IS THE DIFFERENCE BETWEEN A LISTING PROPOSAL AND A LISTING PRESENTATION?

A listing presentation is the in-person vendor meeting — the conversation through which an agent presents their market analysis, marketing strategy and approach to the campaign. A listing proposal is the written document that captures that strategy in full — a tailored record the vendor takes away, reviews and uses to make their final decision.

The presentation is the meeting. The proposal is the leave-behind. Neither replaces the other, and the agents who consistently win listings are increasingly using both — with the proposal as the centrepiece that anchors the presentation and survives it.

Why agents confuse the two

The confusion comes from how the terms evolved in real estate practice. For most of the industry's history, "listing presentation" described both the meeting and the materials used in it — slide decks, printed brochures, CMA printouts. These materials were the "presentation" in both senses of the word.

The listing proposal emerged as a distinct concept as agents recognised that the materials used during a meeting are not the same thing as a document designed to be read independently after it. A slide deck designed for a twenty-minute presentation in person is a poor document for a vendor sitting at their kitchen table the following evening deciding between three agents.

The result is two distinct tools that many agents still treat as one — and one of the clearest practical improvements available to any listing agent is separating them deliberately.

The presentation is the meeting. The proposal is the leave-behind.

What a listing presentation is designed to do

The listing presentation is a live performance. Its purpose is to establish trust, demonstrate competence and guide a vendor through a structured conversation that ends with confidence in the agent.

The presentation works through interaction. The agent reads the vendor's responses in real time — adjusting emphasis, addressing concerns as they emerge, reading body language and tone. A skilled listing presentation is not a fixed script; it's a structured conversation that moves through key stages: understanding the vendor's goals, presenting the market analysis, explaining the marketing strategy, discussing fees, and securing the next step.

The materials used in a listing presentation support the conversation. A well-prepared CMA gives the agent a document to walk through. A printed marketing plan gives the vendor something to engage with during the meeting. But these materials are designed for the moment — they're aids to a live conversation, not standalone documents.

What a listing presentation cannot do is be present when the agent is not. Once the agent leaves the room, the presentation is over. What remains with the vendor is whatever document they were left with — and that's where the proposal takes over.

What a listing proposal is designed to do

The listing proposal is designed to work after the meeting. Its purpose is to give vendors everything they need to make a confident, informed decision — without the agent in the room.

This is a fundamentally different design requirement. A document that works well as a presentation aid — dense with data, requiring verbal explanation — is a poor standalone proposal. A strong proposal must be clear enough to communicate its key points to a vendor reading it independently, specific enough to feel tailored rather than generic, and complete enough to address the questions that arise after the agent has left.

The listing proposal document also serves a second function: it persists across the comparison vendors inevitably make between agents. A vendor who meets three agents in a week is comparing their memories of three conversations. If one agent has left a clear, well-structured listing proposal document and the others haven't, that proposal is doing active work in the decision long after the meeting ended.

Trust and clear communication of process are the leading factors in agent selection, and a written proposal is the clearest way to demonstrate both.

How the two documents work together

Used well, the listing presentation and the listing proposal are a sequence, not alternatives.

The presentation establishes the relationship and guides the vendor through the strategy. The proposal documents that strategy in full, answers the questions that arise after the meeting, and provides the evidence for the vendor's decision.

In practice, this means the proposal should be prepared before the meeting — not assembled afterward from notes. The agent walks in with a tailored draft proposal, uses the presentation to confirm their understanding of the vendor's goals, and refines the document as needed before sending the final version the same evening.

This approach changes the dynamic of the meeting significantly. An agent who brings a prepared proposal to the appointment signals a level of preparation that vendors notice immediately. The document is evidence of the work done before the meeting — and vendors use it to infer how the campaign itself will be managed.

The preparation process that sits behind both documents — the full sequence from research through to a completed proposal — is covered in Part II.

Why strong agents are shifting toward proposal-first selling

The clearest signal of how the industry is moving is the growing number of agents who structure their listing process around the proposal rather than the presentation.

This is proposal-first selling in practice — the approach introduced at the start of this book, where the listing process is built around the proposal rather than the presentation. The presentation still happens, but its purpose shifts. Instead of being the primary vehicle for conveying strategy, it becomes the conversation that surrounds a proposal the vendor can already see and engage with.

In a proposal-first selling workflow, the agent's energy goes into the quality of the written document rather than the performance of the in-person pitch. The vendor leaves with something that continues to work for the agent. And the comparison that happens between meetings is a comparison of proposals — which rewards the agent who invested in the document.

The logic is straightforward: most vendor decisions are made after the agent has left the room. Proposal-first selling structures the listing process to account for that reality — ensuring that the agent's best work is present in both moments, not just the one they're physically in.

PART I · WHY THE PROPOSAL WINS THE LISTING

CHAPTER 3

What Proposal-First Selling Is

A real estate proposal is the document that wins or loses a listing before the agreement is signed. It's the structured case an agent presents to a vendor — covering pricing strategy, marketing plan, communication approach and proof of performance — that answers the question every seller is really asking: why should I trust you with my property?

Most agents treat this document as an afterthought. They show up to an appraisal with a slide deck or a printed PDF they haven't updated in months. The agents consistently winning listings approach it differently. They build a clear, structured proposal tailored to the vendor and the property, and they use it to guide the decision — not just support a pitch.

This chapter defines the proposal as a category — what it is, the job it does, and why the best agents in Australia now build the whole listing process around it.

What is a real estate proposal?

A real estate proposal is a structured document an agent prepares for a vendor that outlines their recommended approach to selling a property. It typically includes the agent's pricing strategy, marketing plan, sales method recommendation, communication plan and evidence of past performance. Unlike a listing presentation, which is a live meeting, the proposal is the document the vendor reviews, compares and uses to make their final decision on which agent to appoint.

A strong real estate proposal performs three functions:

1. It demonstrates that the agent understands the vendor's property and local market.
2. It explains the agent's strategy clearly enough that a vendor can evaluate it without the agent in the room.
3. It gives the vendor confidence that this agent has a structured, professional process — not just enthusiasm.

> It shifts the vendor's experience from 'I sat through a pitch' to 'I reviewed a professional strategy.'

Why agents are moving to proposal-first selling

There's a shift happening in the way top agents approach the listing process. Rather than treating the proposal as a follow-up document sent after the appraisal, they're structuring the entire vendor conversation around it.

In a proposal-first approach, the proposal becomes the central tool guiding the vendor's decision — not a supporting document they may or may not read. It carries the strategy the presentation used to deliver on its own.

In a proposal-first selling workflow, the agent prepares the proposal before the appointment. The live meeting then becomes a walkthrough of the strategy, with the proposal as the reference point. The vendor leaves with a document that answers their questions, presents the agent's case clearly and gives them something concrete to compare.

Proposal-first selling works because it shifts the vendor's experience from "I sat through a pitch" to "I reviewed a professional strategy." It removes ambiguity, reduces follow-up questions and gives the agent a structural advantage over competitors who are still winging it with a few slides and a printout of recent sales.

According to proply's listing workflow model, vendors choose clarity over commission — the agent who explains their process most clearly is more likely to win the listing than the agent who simply quotes the lowest fee.

PART II

Before You Walk In

Listings are won in the days before the meeting, not the hour of it. The quality of your market analysis, the specificity of your marketing plan, the fact that you arrived with a tailored document rather than a promise to send one — all of it is decided in preparation. This part covers the two halves of being ready: what to physically bring to the appointment, and the preparation process that produces it. Work it consistently and the meeting itself starts to feel easy.

PART II · BEFORE YOU WALK IN

CHAPTER 4

What to Bring

Walking into a listing appointment without the right materials is one of the most common ways agents lose listings they should have won. Vendors are making a significant financial decision and they're watching everything — including whether you came prepared. The documents and data you bring don't just support your pitch; they communicate that you take this appointment, and their property, seriously.

The good news is that preparation is one of the few variables entirely within your control. The right materials, organised and ready to walk through, give you confidence and give vendors a clear basis for their decision. This chapter covers everything agents should bring to a listing appointment and why each item earns its place.

WHAT SHOULD AGENTS BRING TO A LISTING PRESENTATION?

Agents attending a listing presentation should bring a comparative market analysis, a tailored marketing plan, a listing proposal document, and any supporting materials that help vendors understand the pricing strategy and sales process for their property.

Each item serves a specific purpose. The CMA establishes pricing credibility. The marketing plan shows vendors how you'll find them a buyer. The proposal document ties it together into a clear picture of what working with you actually looks like. Everything else on the list supports one of these three functions.

This chapter covers the physical and digital materials you carry to the appointment; the preparation process that produces them — the research, analysis and document work done in the days before — is the subject of the next chapter.

Why preparation signals professionalism

Vendors don't just assess what you say in a listing presentation — they assess how you show up. Turning up with well-prepared, tailored materials tells vendors you've done the work before the meeting even starts. It signals that you'll apply the same thoroughness to their campaign.

Vendors rank honesty and transparency among the top qualities they want in an agent. A clearly prepared, well-documented presentation is one of the most direct ways to demonstrate both.

Vendors who can see your reasoning — in writing, with supporting data — are far more likely to trust your judgement on pricing and strategy.

Vendors also weight communication skills and market knowledge heavily when choosing who to list with. The materials you bring are the evidence for both.

Vendors don't just assess what you say — they assess how you show up.

The core documents every agent should bring

These are the non-negotiables — items that belong in every listing appointment regardless of property type or price point.

Comparative market analysis (CMA) Your CMA is the backbone of the pricing conversation. It should cover recent comparable sales in the suburb, current listings competing for the same buyer pool, and any relevant market trend data. Bring it in a format you can walk through with the vendor — not a raw data printout, but a structured document that tells a clear story about where the property sits in the market. Property data from platforms including Pricefinder, CoreLogic and PropTrack all provide solid foundations for CMA preparation.

Listing proposal document A listing proposal is the document that ties your entire approach together — pricing strategy, marketing plan, sales method recommendation, communication plan and fees. Bringing a tailored proposal to the meeting signals a level of preparation that generic slide decks don't. Vendors can read it, refer to it after you leave, and use it to compare you to other agents. It's one of the most powerful tools available to a listing agent.

Marketing plan Your marketing plan should be specific to this property and this vendor's situation — not a standard agency brochure. It should explain which portals you'll use, the photography and copywriting approach, your digital and social strategy, any print or database marketing, and how you'll report back to the vendor during the campaign.

Agency disclosure and listing agreement Bring the relevant disclosure documentation and a listing agreement ready to be signed if the meeting goes well. Having these ready is not presumptuous — it's professional. Vendors who are ready to list will appreciate not having to wait for paperwork.

Market data and comparable sales

The pricing conversation is often where listings are won or lost. Vendors come in with expectations formed by online estimates, neighbour gossip and emotional attachment. Your job is to give them a credible, data-supported view of what the market will actually bear.

Bring printed or digital summaries of:

- Recent comparable sales (sold in the last 60–90 days, adjusted for any differences in size, condition or position)
- Current competition (active listings the buyer pool for this property is also considering)
- Days on market data for the suburb and property type
- Any relevant seasonal or trend context (is the market moving, and in which direction?)

Be prepared to explain your reasoning, not just present the numbers. Vendors don't just want data — they want an agent who can interpret it.

Marketing strategy materials

Your marketing plan should exist as a standalone document vendors can review, not just a section of a slide presentation they half-read while you were talking. Structure it clearly:

- Recommended listing portals and advertising tiers
- Photography, video and floor plan approach
- Copywriting and brand positioning for the property
- Database and off-market outreach
- Social media and digital advertising strategy
- Open home schedule and private inspection approach
- Vendor reporting frequency and format

The more specific this document is to their property, the more compelling it is. A vendor at a $1.2M suburban home and a vendor at a beachfront knockdown have different buyer pools and require different campaigns. Generic marketing plans read as generic.

Supporting documents vendors expect

Beyond the core materials, experienced agents bring supporting documentation that reinforces credibility and answers likely questions before they're asked:

Testimonials or recent results A short summary of recent comparable sales you've handled in the area, with vendor testimonials where available. Keep it relevant — results in their suburb or property type carry far more weight than impressive numbers elsewhere.

Your agency profile Brief overview of your agency, team structure and local market presence. Vendors want to know who they're hiring, not just who's sitting in front of them.

Fee schedule Don't make vendors ask about your commission. Having it documented and ready to discuss signals confidence and transparency.

Suburb market report A one-page overview of current market conditions, recent sales volumes and price trends. This positions you as a local market authority and gives vendors useful context for the pricing conversation.

Why the modern proposal is digital

The format you deliver in matters more than most agents realise — and it's the one place where proposal-first selling quietly depends on the medium. The method's whole promise is that your best work stays in the room after you've left. A printed document can't keep that promise. It can't be updated when a figure changes, can't be shared in one tap with the partner who wasn't there, and can't tell you the vendor reread the pricing section at 9pm.

A structured digital proposal does all three: tailored to the property, shareable the moment the meeting ends, current the moment you change it, and quietly informative about how the vendor is engaging.

That's why the agents winning consistently work digitally — not because it's fashionable, but because the medium is part of the method. A printed copy still earns its place as a leave-behind; treat it as the backup, not the main event. The document that does the real work — the one the vendor compares, shares and returns to — should be the one they can open on any device, the same evening you met.

PART II · BEFORE YOU WALK IN

CHAPTER 5

The Pre-Listing Checklist

Most agents who lose listings don't lose them in the room. They lose them in the days before — through incomplete research, a pricing conversation they weren't fully prepared for, or a proposal document that felt rushed. The listing presentation is the visible part. The preparation is what determines the outcome.

A repeatable checklist changes this. Rather than relying on habit and memory, a structured preparation process ensures that every appointment gets the same standard of work — regardless of how busy the week has been or how little notice you had before the meeting.

This checklist covers everything agents should work through before a listing appointment, organised in the sequence that makes the preparation most efficient.

WHAT IS A LISTING PRESENTATION CHECKLIST?

A listing presentation checklist is a structured preparation framework that guides agents through the research, analysis and document preparation steps required before a vendor meeting — ensuring they arrive with the pricing knowledge, marketing strategy and proposal materials needed to win the listing.

It's distinct from what you bring on the day (the physical and digital materials you carry to the appointment) and from the meeting structure itself (how you run the conversation). The checklist is everything that happens before you walk in the door. Done well, it's the reason the meeting feels effortless.

Why listing presentations are won before the meeting

Vendors form their first impression of an agent before a word is spoken. The quality of your CMA, the specificity of your marketing plan, the clarity of your proposal document — all of these are evidence of work done before the appointment. They tell vendors whether you've treated their property as a priority or as a standard Tuesday.

Vendors weight preparation, communication skills and market knowledge heavily when choosing who to list with. These qualities don't emerge in the meeting — they're demonstrated through the materials and analysis you show up with.

Preparation is also where experienced agents separate themselves from high-volume operators who cycle through appointments without tailoring their approach. A thorough preparation process is one of the few genuine competitive advantages available to any agent at any career stage.

Most agents who lose listings don't lose them in the room. They lose them in the days before.

STEP 1

Research the property

Start with the property itself before you look at anything else.

- Inspect the property details — land size, build year, bedrooms, bathrooms, parking, any notable features or improvements
- Check the title and any encumbrances, easements or caveats if accessible
- Review council zoning and any development potential or restrictions
- Check the property's sales history — previous prices, how long it was held, any previous campaigns that didn't result in sale
- Note any obvious presentation issues that will affect buyer perception and pricing (deferred maintenance, dated interiors, landscaping)

This step grounds everything that follows. You cannot have a credible pricing conversation without knowing the property.

STEP 2

Prepare the comparative market analysis

Your CMA is the foundation of your pricing discussion. Vendors come to the meeting with their own number in mind — formed by online estimates, what a neighbour got, and hope. Your job is to give them a credible, data-supported view of what the market will actually pay.

- Pull recent comparable sales from the last 60–90 days using platforms including Pricefinder, CoreLogic and PropTrack
- Select five to eight comparables that genuinely reflect this property's buyer pool — adjust for meaningful differences in size, condition, position and features
- Review current active listings — these are the competition for the same buyers
- Note days on market trends for the suburb and property type
- Identify the likely price range with a clear rationale, not just a number

The goal is not to present a spreadsheet — it's to be able to tell a clear, defensible story about where this property sits in the market and why. Prepare that narrative before you arrive.

STEP 3

Prepare the pricing discussion

The CMA gives you the data. This step prepares you for the conversation.

- Identify the vendor's likely expectations — check online estimates for the address, review what comparable vendors in the suburb have been asking
- Prepare for the gap, if one exists, between vendor expectations and market evidence — think through how you'll address it clearly and respectfully
- Know your recommended method of sale and be ready to explain why it suits this property and this market (auction, private treaty, expressions of interest)
- Prepare your position on pricing strategy — aspirational vs tight range, and the trade-offs of each in current conditions

The pricing conversation is where many agents lose confidence. Preparing your reasoning in advance means you can hold the discussion calmly rather than improvising under pressure.

STEP 4

Build the marketing plan

Your marketing plan should be specific to this property — not a standard agency template with the address swapped in. Vendors can tell the difference.

- Identify the primary buyer profile for this property (upsizers, downsizers, investors, first-home buyers, lifestyle buyers) and tailor the marketing accordingly
- Select and justify your recommended portal strategy — standard, feature or premiere listings, and why
- Plan the photography and copywriting approach — style, tone, any specific features to highlight
- Confirm your digital and social advertising approach
- Include any database or off-market outreach that's relevant
- Set out the open home and inspection strategy
- Document your vendor reporting frequency and format

The marketing plan should be a document the vendor can read independently, not just a set of talking points.

STEP 5

Structure the presentation conversation

Know how you're going to run the meeting before you arrive. Improvising the structure is how agents end up spending too long on commission and not long enough on the marketing strategy.

- Decide your opening — how you'll set the agenda and what you'll ask to understand the vendor's goals and timeline
- Know the sequence you'll use: vendor goals → property context → market data → pricing discussion → marketing plan → proposal and fees → next steps
- Prepare for likely objections: pricing pushback, commission questions, marketing budget, why you over a competitor
- Plan your close — what you'll ask for and how you'll handle "we need to think about it"

A structured conversation doesn't mean a scripted one. It means knowing where you're going and how to get back on track if the discussion wanders.

STEP 6

Prepare the proposal document

This is the step most agents either skip or rush — and it's often the one that determines whether a vendor chooses you over an equally capable competitor.

A well-prepared real estate proposal brings together everything in one document: your pricing strategy, marketing plan, sales method recommendation, communication plan and fees. It's the leave-behind that keeps working after you've left the room, and the document vendors share with partners or family who weren't at the meeting.

In a proposal-first selling workflow, the proposal isn't an afterthought — it's the centrepiece of the appointment. Agents who arrive with a tailored, structured proposal signal a level of preparation that vendors remember when they're comparing three agents the following morning.

- Ensure the proposal is specific to this property — not a template with the address inserted
- Include your pricing rationale, marketing plan summary, fees and a clear explanation of your sales process
- Build it to send digitally — so it can be shared, updated and tracked after the meeting; a printed copy is an optional leave-behind, not the main document
- Review the proposal the night before — errors in a proposal document undermine everything it's trying to achieve

PART III

Build the Winning Proposal

This is the heart of the book: the document itself. A proposal that wins is specific where a losing one is generic, and it commits where a losing one describes. Over the next three chapters we cover what a great proposal includes section by section, how to write each part so it reads as tailored rather than templated, and what strong and weak versions actually look like side by side. The difference between the proposal that wins and the one that doesn't is almost never structure. It's specificity — and specificity can be learned.

PART III · BUILD THE WINNING PROPOSAL

CHAPTER 6

What a Great Proposal Includes

A real estate proposal is only as strong as what's in it. Agents who lose listings to less experienced competitors often have better market knowledge and stronger track records — but the competitor's proposal made their process clearer. Vendors don't always choose the best agent. They choose the agent who best explains what they'll do.

Understanding what a proposal should contain — and why each section earns its place — is the foundation of building proposals that win listings consistently. This chapter explains every core component, what vendors expect from each section, and the difference between proposals that build confidence and those that raise questions.

WHAT SHOULD A REAL ESTATE PROPOSAL INCLUDE?

A real estate proposal should include a property overview and campaign objectives, a pricing strategy supported by market analysis, a specific marketing plan, a vendor communication plan, and a clear statement of the agent's fees and credentials. Together, these sections give vendors everything they need to make a confident decision about who to appoint.

A strong real estate proposal includes:

1. Property overview and campaign objectives
2. Pricing strategy and market analysis
3. Marketing strategy built around the buyer profile
4. Vendor communication plan with specific commitments
5. Agent credentials and recent local results
6. Fees and next steps

Each section serves a distinct purpose. Skip one and the proposal has a gap vendors will notice — even if they can't articulate exactly what's missing.

Why proposal structure matters

Vendors reading a proposal are asking a simple question: if I appoint this agent, do I understand what will happen next? A well-structured proposal answers that question directly. A poorly structured one

— or one that contains some sections but not others — leaves vendors with doubts they'll resolve by moving to someone else.

Clear communication and transparency about the sales process are among the leading factors vendors consider when choosing an agent. The proposal is where those qualities are either demonstrated or missed. An agent who can articulate their process in writing gives vendors evidence of how they'll communicate throughout the campaign.

Structure also signals professionalism. A proposal that moves logically from property context to pricing to marketing to communication tells vendors they're dealing with an organised, deliberate agent. One that covers the same content in a scattered or incomplete way tells the opposite story.

Vendors don't always choose the best agent. They choose the agent who best explains what they'll do.

SECTION 1

Property overview and campaign objectives

Every proposal should open by demonstrating that the agent has understood this specific property and this specific vendor's situation — not just the category of listing.

What to include: - A brief description of the property and its key features from a buyer's perspective - The vendor's stated goals — timeline, price expectations, flexibility, and any factors affecting the campaign (tenants, presentation work required, development potential) - The campaign objective in clear terms: what outcome you're aiming to achieve and why it's achievable in current market conditions

This section is short — typically half a page — but it does important work. It tells the vendor that the rest of the proposal was built for their situation, not assembled from a generic template.

SECTION 2

Pricing strategy and market analysis

This is the most scrutinised section of any proposal. Vendors come to every listing appointment with a number in mind — formed by online estimates, recent sales they've heard about, and optimism. Your pricing section needs to give them a credible, data-supported view of where the property actually sits in the market.

What to include: - A summary of comparable sales from the last 60–90 days, with brief commentary on why each one is relevant (or how it differs from this property) - An overview of current competition — active listings competing for the same buyer pool - Your recommended price range or strategy, with clear reasoning - Your recommended method of sale — auction, private treaty or expressions of interest — and why it suits this property and market conditions

The goal of this section is not to present data — it's to show your interpretation of it. Any agent can pull comparable sales. The proposal should communicate what that data means for this vendor's decision.

Property data from platforms including Pricefinder, CoreLogic and PropTrack provides the foundation for a credible CMA. The analysis and recommendation sit with the agent.

SECTION 3

Marketing strategy

A weak marketing section is one of the most common reasons proposals fail to win listings. Vendors know what a standard agency marketing package looks like — they've seen it online, heard about it from neighbours, researched it before the meeting. A section that reads as a standard package with the address swapped in confirms their worst fear: that they're just another listing.

What to include: - The primary buyer profile for this property — who you're trying to reach, and why - Portal advertising strategy — recommended tier, duration, and your reasoning - Photography, video and floor plan approach — what you're recommending and why it suits this property - Digital and social advertising strategy - Any database or off-market outreach relevant to this buyer profile - Open home and inspection approach - Print or letterbox marketing if applicable

Every recommendation should be justified. Vendors who understand why you're suggesting a particular marketing approach are more likely to support the budget required to execute it — and less likely to push back on costs.

SECTION 4

Vendor communication plan

This section is often missing from proposals — and its absence is more damaging than many agents realise.

Vendors' most common complaint about agents after a campaign is that they weren't kept informed. The communication plan in the proposal is your opportunity to address that concern before it exists — to show vendors exactly what they can expect to hear, when, and in what format.

What to include: - How often you'll provide campaign updates (post-inspection reports, weekly summaries) - What format updates will take — phone call, email, in-person meeting - How you'll handle buyer feedback, including negative feedback - What the vendor can expect from you around pricing conversations during the campaign - How you'll communicate about offers and negotiations

A clear communication plan signals to vendors that they're dealing with an agent who manages campaigns proactively, not one who only calls when there's a problem.

SECTION 5

Agent credentials and local track record

Vendors don't just want to know what you'll do — they want confidence that you can do it. The credentials section gives them that evidence.

What to include: - Recent comparable sales you've achieved in the area, with results and timeframes where appropriate - Vendor testimonials, particularly from similar property types or price points - Your local market presence — suburb expertise, time in the area, relevant database size - Agency resources that support the campaign (support staff, marketing capabilities, buyer database)

Keep this section targeted. Results in the vendor's suburb or property category carry far more weight than impressive numbers from across the city. Two or three well-chosen local results are more persuasive than a long list of general achievements.

SECTION 6

Fees and next steps

State your commission clearly and explain what it covers. Vendors who have to ask about fees, or who find a vague "competitive rates" reference instead of a number, lose confidence — not in the price, but in the agent's willingness to be direct.

What to include: - Your commission rate and any tiered or incentive fee structure - What the commission covers — listing, marketing coordination, negotiation, settlement liaison - Marketing budget recommendations — portal advertising costs, photography, any other direct costs - The proposed campaign timeline — when photography would be booked, when the listing would go live, when the first open home would be scheduled - A clear call to action: what the vendor needs to do next to move forward

A proposal that ends with a clear next step is a proposal that asks for the business. Vendors who receive a proposal with no clear action to take are left to initiate the next conversation themselves — and many don't.

PART III · BUILD THE WINNING PROPOSAL

CHAPTER 7

How to Write It

Most agents understand what a real estate proposal should contain. Fewer know how to write one that actually works — a document that's specific enough to feel tailored, clear enough to survive the kitchen-table conversation after the meeting, and persuasive enough to move a vendor from undecided to ready to sign.

The gap between knowing the sections and writing them well is a process problem. Agents who produce strong proposals consistently aren't necessarily better writers — they have a better method. They start in the right place, build the sections in the right order, and edit for clarity rather than completeness. This chapter walks through that process.

HOW DO AGENTS WRITE A REAL ESTATE PROPOSAL?

Agents write a real estate listing proposal by starting with the vendor's specific situation and goals, then building each section — pricing strategy, marketing plan, communication approach and fees — around what that particular vendor needs to understand to make a confident decision. Strong proposals are tailored documents, not completed templates.

The process for writing a real estate proposal is:

1. Start with the vendor's goals and situation
2. Write the pricing section first — commit to a position before writing anything else
3. Build the marketing section around a specific buyer profile
4. Write the communication plan in specific, committing language
5. Write credentials as evidence — recent local results, not biography

The distinction matters. A template gives you structure. The writing process gives the template meaning. An agent who fills in a template without adapting the substance produces a proposal that reads exactly like what it is: a template with the address changed.

Why most proposals read as generic

Generic proposals have a recognisable feel. They describe the marketing strategy in broad terms without explaining why those choices make sense for this property. They present comparable sales without interpreting them. They describe the communication process without committing to specifics.

The underlying problem is that many agents write proposals starting from the document rather than from the vendor. They open a template, fill in the fields, and consider the proposal complete. The result is a document that describes what the agent usually does rather than what they've decided to do for this property.

In a proposal-first selling workflow, the proposal is the centrepiece of the listing appointment — not a document completed after the fact. Writing it well requires thinking through the specific strategy before writing a single word.

A template gives you structure. The writing process gives the template meaning.

STEP 1

Start with the vendor, not the template

Before opening a document, work through the following questions for this specific property and vendor:

- What are the vendor's primary goals — maximum price, speed of sale, campaign simplicity, or something else?
- What is their timeline and how flexible is it?
- What do they already believe about the property's value, and where did that belief come from?
- Who is the most likely buyer for this property, and what does reaching them require?
- What objections will this vendor have — to pricing, to marketing budget, to the recommended method of sale?

The answers to these questions should shape every section that follows. A vendor under financial pressure and a downsizer with twelve months of flexibility need different proposals — not structurally different, but substantially different in emphasis and tone.

If you didn't get clear answers to these questions in the appraisal, the proposal will reflect that gap. The preparation drives the writing.

STEP 2

Write the pricing section first

Most agents write the property overview first because it feels like the natural starting point. Start with pricing instead.

The pricing section is the section vendors scrutinise most carefully, and it's the one that most clearly reflects whether the agent has done the work. Writing it first forces you to commit to a position — a specific price range, a recommended method of sale, a rationale — before the rest of the document is shaped around it.

How to write it:

Open the section with a brief description of current market conditions in the suburb — not a paragraph of generic market commentary, but a specific statement about what's happening with buyer demand, active supply and recent sale results right now. One or two sentences.

Then walk through the comparable sales. Don't list them — explain them. For each comparable, note what it tells you about this property's likely position: "24 Elmwood, which sold in six days at $1.18M, had a similar land component but a significantly older improvement — which supports the upper end of our range for your property."

Close with a clear recommendation: price range, method of sale, and the specific reason this method suits this property and this vendor's timeline. Be direct. Vendors who receive a proposal with a clear pricing recommendation and the reasoning behind it are far more confident than those who receive a range with no rationale.

STEP 3

Write the marketing section around the buyer profile

Marketing sections fail when they describe what the agent will do without explaining why. Start the section by identifying the buyer — specifically.

"The most likely buyer for this property is a family upgrader purchasing from within a 5km radius, with a budget of $1.1–1.3M and an active search window of the next 60 days. Our strategy is built around reaching that buyer where they're actively looking and creating urgency before competing listings enter the market."

Every marketing decision that follows should connect back to that buyer profile. Why this portal tier? Because that's where buyers in that price bracket are searching. Why this photography approach? Because the features most likely to attract that buyer — indoor/outdoor flow, kitchen, light — need to be the first thing they see.

Specificity turns a standard marketing section into a compelling one. Vendors respond strongly to agents who demonstrate they understand who the buyer is and how to reach them. The marketing section of a listing proposal is where that understanding is either shown or absent.

STEP 4

Write the communication plan in specifics

Most communication plans read as aspirations rather than commitments. "We'll keep you regularly informed throughout the campaign" is not a communication plan — it's a reassurance that communicates nothing.

Write this section in specific, committing language:

"You'll receive a written campaign update by 5pm every Tuesday throughout the listing period, covering inspection numbers, buyer feedback, and any shifts in market conditions that affect our strategy. We'll also call you within two hours of every open home with a verbal summary of buyer feedback."

The specificity serves two purposes. For the vendor, it creates genuine confidence that they'll be kept informed. For the agent, it creates a framework they're now accountable to — which is exactly the kind of structure that separates well-managed campaigns from poorly managed ones.

Explicit process commitments — stating what will happen, when and how — reduce client anxiety and improve outcomes. In real estate, the communication plan is that commitment in writing.

STEP 5

Write credentials as evidence, not biography

The credentials section should answer one question: why should this vendor trust that you'll deliver what the rest of the proposal promises?

Biography doesn't answer that question. Results do. Write the credentials section around recent, relevant outcomes — comparable properties in the same suburb or price range, with results that speak directly to what this vendor wants.

"In the last twelve months, I've sold four properties within 500 metres of yours. The median days on market across those campaigns was 14, with an average sale price 2.8% above the initial listing price."

Two or three results like this, supported by a vendor testimonial where available, are more persuasive than a paragraph describing years of experience and agency affiliations.

Common proposal writing mistakes

Writing for completeness rather than clarity. A longer proposal is not a better one. Every sentence should earn its place. If a section can be cut without losing anything the vendor needs to know, cut it.

Using agency language instead of vendor language. Phrases like "multi-channel digital strategy" and "premium portal exposure" are familiar to agents and meaningless to most vendors. Write in the language your vendor uses.

Hedging on pricing. A proposal that offers a broad price range without clear reasoning — or that defers the pricing discussion entirely to "further discussion" — signals to vendors that the agent hasn't committed to a position.

Copying sections across proposals. The marketing strategy section from last week's proposal in the same suburb might look very similar to this one — but if anything feels recycled, the damage is significant. Adapt every section, even when the substance is similar.

Sending without reviewing. A proposal with a factual error, a wrong address, or the wrong vendor's name is worse than no proposal at all. Review it, then have someone else check it before it leaves your hands.

PART III · BUILD THE WINNING PROPOSAL

CHAPTER 8

Examples That Won the Listing

Reading about what a real estate proposal should contain is useful. Seeing what strong and weak versions of each section actually look like is more useful. Principles tell you what to aim for; examples show you whether you're hitting it.

This chapter works through each core section of a listing proposal with concrete examples — the specific language, structure and level of detail that separates proposals that win listings from those that don't. It also covers the patterns that make weak proposals easy to identify, so agents can audit their own documents before they reach a vendor.

WHAT DOES A REAL ESTATE PROPOSAL EXAMPLE SHOW?

A real estate proposal example shows the specific language, structure and level of detail that distinguishes a well-prepared, tailored proposal from a generic one — illustrating what each section should communicate and how to write it in a way that builds vendor confidence.

Examples are more instructive than templates because they show the thinking behind the structure. It's one thing to know that the pricing section should include comparable sales. It's another to see how an effective agent frames those comparables in writing.

Why examples matter more than principles

Most agents who produce weak proposals don't know they're weak. The sections are all present. The document looks complete. The problem is in the quality of the content — the pricing section is vague, the marketing plan is generic, the communication commitment is aspirational rather than specific.

Reading examples of strong proposals alongside weak ones makes the gap visible. It also makes it fixable — because the difference between a good proposal and a poor one is almost always a question of specificity, not structure.

Vendors rate preparation and communication quality as more important than commission when selecting who to list with. A strong proposal is the most direct demonstration of both. What follows shows what "strong" actually looks like in each section — with concrete listing proposal examples you can apply directly.

The difference between a good proposal and a poor one is almost always specificity, not structure.

Example: a strong property overview

WEAK "4 Elmwood Close is a well-presented four-bedroom family home in a sought-after location, offering comfortable living across two levels."

STRONG "4 Elmwood Close is a four-bedroom, two-bathroom family home on 612sqm in the heart of the Willowdale school catchment. The property last sold in 2017 at $820,000 and has been significantly improved since — the kitchen and main bathroom were both renovated in 2021. Our campaign objective is to achieve a result above $1.15M within a 30-day listing window, targeting family upgraders currently active in the suburb."

The strong version does three things the weak one doesn't: it establishes the vendor's position clearly, it sets a specific campaign objective, and it identifies the buyer. The vendor reading the strong version knows the agent has done the work. The vendor reading the weak version knows they've read a sentence that could describe any property in any suburb.

Example: a credible pricing strategy section

WEAK "Based on current market conditions and comparable sales in the area, we believe the property is likely to achieve in the range of $1.1M–$1.3M. We recommend taking the property to market via private treaty with a price guide consistent with this range."

STRONG "Three comparable sales are directly relevant to your property's position in the current market:

— 12 Birchwood Avenue (sold March, $1.19M): 4 bed/2 bath on 580sqm, similar renovation standard. Sold in 11 days, two offers received. The smaller land component supports the upper end of our range for Elmwood.

— 8 Ridgemont Place (sold February, $1.08M): 4 bed/1 bath on 640sqm, original kitchen and bathrooms. This result establishes the floor for a property at your improvement level.

— 22 Thornton Street (sold April, $1.22M): 4 bed/2 bath on 595sqm, school-catchment premium evident in the result. Sold in 8 days, unconditional.

Our recommended range is $1.15M–$1.22M. We recommend private treaty with a price guide of $1.15M+ to attract the family upgrader buyer pool without capping expectations. Auction is an option if the vendor prefers a defined campaign timeline."

The strong version gives the vendor something to engage with — specific results, clear reasoning, and a recommendation with a rationale behind it. Transparency around pricing methodology is one of the leading factors in building agent trust. The strong version delivers that; the weak version avoids it.

Example: Strong listing proposal structure

A strong listing proposal example follows this sequence:

1. **Property overview** — specific to this property, with a clear campaign objective
2. **Pricing strategy** — comparable sales with commentary, clear price range and method rationale
3. **Marketing plan** — built around the buyer profile, every decision justified
4. **Communication plan** — specific commitments, not aspirations
5. **Credentials** — recent local results, not biography
6. **Fees and next steps** — stated clearly, with a call to action

Example: a specific vs generic marketing plan

WEAK "Our comprehensive marketing strategy includes premium portal advertising on realestate.com.au and domain.com.au, professional photography and copywriting, social media promotion, and regular open homes. We will maintain consistent communication with you throughout the campaign."

STRONG "Our buyer for 4 Elmwood Close is a family upgrader with a budget of $1.1–1.25M, currently searching within a 5km radius of their existing home. Based on this profile, our strategy is:

Portal advertising: Premiere listing on realestate.com.au for the first four weeks (the window when search activity is highest for this buyer profile), supported by a Feature listing on Domain.

Photography: Full professional shoot with twilight exterior — Elmwood's north-facing rear aspect and outdoor entertaining area are the key buyer triggers for this price bracket.

Social advertising: Targeted Facebook and Instagram campaign to homeowners aged 35–50 within a 7km radius, running from listing day.

Database: Direct outreach to 48 registered buyers currently active in our system with matching criteria.

Open homes: Saturdays 11–11:45am for the first three weeks, with private inspections available by appointment for pre-qualified buyers.

Week 1 results meeting: In-person or video meeting on the Tuesday of the first open home week to review buyer feedback and adjust strategy if needed."

The difference is not volume — it's that every decision in the strong version is explained in terms of the buyer. Vendors who see this level of specificity understand that the agent has actually thought about their property.

Example: a communication plan vendors trust

WEAK "We pride ourselves on keeping vendors fully informed throughout the campaign and will provide regular updates on enquiry, inspections and buyer feedback."

STRONG "You'll receive a written campaign summary by 5pm every Tuesday, covering: number of portal enquiries and views, inspection attendances, buyer feedback (including specific objections or concerns raised), and any changes to strategy we're recommending.

After every open home, we'll call you within 90 minutes with a verbal summary of what we observed and heard from buyers.

If an offer is submitted, we will call you immediately, regardless of the day or time. We will not communicate an offer by email or text without first speaking to you by phone.

If the campaign reaches week three without strong buyer interest, we'll schedule a specific meeting to review pricing, marketing reach and any adjustments needed before week four."

The second version is a commitment, not an intention. Vendors who read it know exactly what they're going to receive. That certainty is what builds confidence in the agent before the campaign has started.

What weak proposals have in common

After reviewing the examples above, the pattern in weak proposals becomes clear:

They describe rather than commit. Weak proposals describe what the agent typically does. Strong proposals commit to what they will do for this property. The language shift from "we provide" to "you will receive" changes the entire register of the document.

They omit the buyer. The most consistent weakness in marketing sections is the absence of a clearly identified buyer profile. If the marketing plan doesn't start with who the buyer is, it's describing activity rather than strategy.

They hedge on pricing. A wide price range with no rationale is not a pricing strategy — it's a range the vendor could have generated themselves from an online estimate. Pricing sections that don't commit to a view undermine the agent's credibility in the section vendors scrutinise most.

They use agency language. Phrases like "multi-channel digital strategy", "premium brand exposure" and "extensive buyer database" sound professional to agents and mean nothing to vendors. The best proposals are written in plain language a vendor can evaluate without industry knowledge.

In a proposal-first selling approach, the proposal is what vendors compare when they're deciding between agents. Strong proposals make that comparison easy — and make the outcome clear.

PART IV

Deliver It

You've prepared the analysis and built the document. Now you run the meeting. A great proposal doesn't replace the conversation — it anchors it, freeing you to do the thing only a person can do: build trust, read the room and answer the questions that actually decide the listing. This part covers the listing presentation done right: what vendors are really assessing, how to structure the conversation so it moves with purpose, and how to close on a clear next step rather than an open-ended "we'll be in touch."

PART IV · DELIVER IT

CHAPTER 9

The Listing Presentation, Done Right

The listing presentation is the single most important meeting in the listing process. It's where the vendor decides whether they trust you enough to hand over what is likely their largest financial asset — and it usually lasts less than an hour. Most sellers meet with two or three agents before choosing who to appoint, which means your presentation isn't happening in isolation — it's being compared.

Yet most agents walk in underprepared. They rely on charm, a few printed pages and a vague promise to "get the best price." The agents winning listings consistently do something different: they prepare a structured, vendor-focused meeting backed by a clear proposal that continues working after they leave.

This chapter explains what a listing presentation is, what vendors actually care about, and how to structure the meeting so the conversation and the proposal work as one system.

How the meeting actually works

We defined the listing presentation in Part I — the meeting where an agent presents their strategy to win the listing agreement. This chapter is about running it well.

In the Australian market, the meeting usually happens at the property itself. The vendor has often invited two or three agents to present, and each gets roughly 45 to 60 minutes to make their case. What happens in that window — and what materials the vendor reviews afterwards — determines who wins the listing.

A listing presentation is not just a pitch. It's a working meeting where the agent should be gathering as much information as they're presenting. Understanding the vendor's motivation, timeline, concerns and expectations is just as important as explaining your marketing plan.

> Every section of your presentation should map back to one of these four questions. If it doesn't, it's filler.

What vendors actually care about when choosing an agent

Agents tend to overestimate how much vendors care about awards, years of experience and brand. The research tells a different story.

The National Association of Realtors' Profile of Home Buyers and Sellers consistently finds that sellers prioritise three things when selecting an agent: help marketing the home to potential buyers, pricing the home competitively, and selling within a specific timeframe. The top factors influencing which agent gets appointed are reputation and trustworthiness — not commission rate.

REA Group's Property Seeker Survey reinforces this in the Australian context: honesty and transparency are what consumers value most in agents — ranked above problem-solving ability, market knowledge and effectiveness. Vendors want agents who give it to them straight, even when the news isn't good.

In practical terms, this means the listing presentation needs to answer four questions:

Can I trust this agent? Are they being honest about price, or telling me what I want to hear?

Do they have a real plan? Not a generic marketing package — a strategy tailored to my property and my market.

Will they communicate? Will I hear from them regularly, or will I have to chase them for updates?

Can they prove they've done this before? Not with a list of 200 sales — with relevant evidence that they understand properties like mine.

Every section of your presentation should map back to one of these four questions. If it doesn't, it's filler.

How to structure a listing presentation

There's no single correct format, but the most effective listing presentations follow a pattern: listen first, present second, and leave the vendor with something concrete.

Opening: Ask, don't pitch (5–10 minutes). Start by understanding the vendor's situation. Why are they selling? What's their timeline? Have they sold before? What matters most to them — speed, price, process? The answers shape everything you present next. Agents who launch into a pitch before they understand the vendor's priorities lose trust immediately.

Pricing discussion (10–15 minutes). Walk through your comparable sales analysis. Explain your recommended price guide or range, the evidence behind it, and what it means for buyer interest. Be direct. Vendors respect agents who present the data honestly — even when the number is lower than they hoped. This is where trust is built or lost.

Marketing plan (10–15 minutes). Explain your specific plan for this property. Cover photography, digital marketing, portal strategy, print, signage and open home approach. Be clear about what's included in your fee and what's a vendor-paid cost. Avoid generic overviews — show the vendor you've thought about how to position their specific property to the right buyer pool.

Sales method recommendation (5 minutes). Recommend auction, private treaty or expressions of interest — and explain why that method suits this property in this market. Vendors appreciate agents who have a clear opinion backed by reasoning, not agents who say "whatever you prefer."

Communication plan (5 minutes). Explain how often you'll report back, in what format, and how you handle buyer feedback. This is the section most agents skip — and it's the one vendors remember. Poor communication is the number one complaint vendors have about agents. Address it proactively and you stand out from every competitor who doesn't.

Close: Next steps (5 minutes). Don't leave the meeting open-ended. Explain what happens next — whether that's a follow-up call, a second meeting, or signing the agency agreement. Leave the vendor with your proposal — ideally the digital version they can open on any device — so they have something concrete to review and compare.

PART V

The Modern Edge

Everything so far works with a notepad and discipline. This part is about the multiplier. Proposal-first selling asks you to produce a tailored, high-quality document before every appointment — and the honest objection is time. You can't rebuild a proposal from scratch for every appraisal in a full week. This is where the modern toolkit earns its place: AI to take the first draft off the content-heavy work, and a connected workflow so the proposal isn't an island. We'll be clear about where these tools genuinely help and where judgement, local knowledge and the relationship remain entirely yours.

PART V · THE MODERN EDGE

CHAPTER 10

AI for Listing Agents

AI has entered the real estate workflow faster than most agents expected — not as the industry-disrupting force the headlines predicted, but as a practical tool that saves time on the content-heavy parts of the job. Drafting listing descriptions, preparing proposal sections, writing vendor updates, summarising market data: the tasks that used to take an hour now take minutes.

Most discussions about AI swing between two extremes — breathless hype about agents being replaced, or dismissive scepticism that it's a fad. Neither is useful. The reality is more grounded. AI is already helping agents do specific parts of their job faster and better, and the highest-value application for a listing agent is the one this book is about: preparing a tailored proposal before every appointment.

WHAT AI MEANS IN REAL ESTATE

In real estate, AI refers to software that uses artificial intelligence — typically large language models and machine learning — to help agents create content, analyse data and automate repetitive tasks within their sales and marketing workflows.

It isn't a single product. It's a capability layer being embedded into the tools agents already use — CRMs, marketing platforms, proposal software. Some agents use standalone tools like ChatGPT or Claude directly; others use AI features built into their existing software without thinking of it as "AI" at all. The practical definition is simple: if a tool is drafting, summarising or suggesting content based on your inputs, it's using AI.

Where AI genuinely helps

AI is strongest where the task involves writing, explanation or structured information — which is exactly where listing preparation lives.

Listing descriptions and marketing copy. Property copy, social posts, portal ads, email campaigns. AI produces a competent first draft from basic inputs in seconds. Agents who use it well treat the output as raw material to be edited, not finished content.

Proposal sections. This is where AI has the most strategic impact for a listing agent. Market overviews, suburb summaries, marketing-strategy rationale, communication-plan outlines — all can be drafted with AI and then refined. The structure and substance come from your expertise; AI handles the writing.

Comparable sales narratives. Once you've pulled the comps from Pricefinder, CoreLogic or PropTrack, AI can help turn the raw data into a readable explanation of what those sales mean for pricing — rather than just listing them.

Vendor communication. Post-appraisal follow-ups, campaign updates, market commentary. AI helps you write clear, professional communications at a pace that's otherwise impossible when you're managing several active listings at once.

Objection preparation. Drafting clear responses to the predictable objections — pricing pushback, commission questions, marketing budget — so you walk into the meeting prepared rather than improvising.

The pattern holds: early uptake of AI is driven by productivity, not transformation. Agents aren't redesigning their work — they're getting more done in less time.

Use AI for the first 80 per cent; apply your expertise to the final 20.

Where AI doesn't belong

Knowing AI's limits matters as much as knowing its strengths. The parts of a listing that actually win or lose the business are not content tasks.

Pricing judgement. AI can summarise comparable sales, but it cannot make the call on where to price a property. That requires local knowledge, an understanding of vendor motivation, and a read on current buyer sentiment. It should never be the sole basis for a CMA.

Negotiation. Reading a buyer's intent, managing a vendor's expectations in real time, navigating the emotional dynamics of a transaction — these are human tasks. AI has no role in the room.

Trust. The listing presentation is a trust-building exercise. Vendors choose agents on honesty, confidence and rapport. AI can prepare the materials; it can't replace the agent.

Local market knowledge. Knowing that a street floods in heavy rain, that a development application has been lodged nearby, that a particular buyer pool is active this month — this is the knowledge that separates experienced local agents from everyone else.

There's a useful line to draw: tools that assist agents get adopted, while tools that try to replace judgement get resistance. AI is excellent at content and information processing, and poor at judgement and relationships. Use it for the first; protect the second.

AI across the listing workflow

AI doesn't sit in one step — it supports several:

- **Pre-appraisal:** summarise suburb data and comparable sales into talking points.
- **Proposal preparation:** draft the written sections; you supply the strategy.
- **Listing presentation:** prepare objection responses so you walk in fully ready.
- **Marketing campaign:** generate first drafts of listing copy and social content.
- **Vendor reporting:** turn raw campaign data into clear updates.
- **Follow-up:** maintain the communication cadence between meeting and signature.

The agents getting the most value aren't using AI for one task — they're embedding it across the workflow so every content-heavy step is faster. This is what makes proposal-first selling practical at volume.

Producing a customised proposal before every appointment is only feasible when AI takes the drafting load and you focus on judgement and refinement. The agent's time shifts from writing to reviewing — and the proposal reaches a professional standard on every appraisal, not just the ones you had time to prepare for.

A caution worth stating plainly: a well-reviewed, AI-assisted proposal should be indistinguishable from one written from scratch — often more consistent. The risk is publishing first drafts without review, which is exactly what produces generic-feeling content. Use AI for the first 80 per cent; apply your expertise to the final 20.

The categories of tools

Rather than chase individual products, it helps to understand the categories:

- **General writing assistants** like ChatGPT, Claude and Gemini — flexible, but you supply the structure and context each time.
- **Proposal software with AI built in** — handles both the document structure and the content generation, the category where AI and workflow integration overlap most.
- **Marketing platforms** — AI for listing copy and campaign content.
- **CRMs** — lead scoring and follow-up drafting, still maturing in most Australian systems.
- **Visual tools** — photo enhancement and virtual staging, with quality that varies.

The most effective agents combine a general assistant for ad-hoc tasks with purpose-built tools for their core workflows — particularly proposal preparation, where structure and content generation matter most together.

What's next

The realistic trajectory isn't AI replacing agents. It's AI removing friction from the parts of the job that slow agents down — proposal builders that draft as you build, CRMs that write follow-ups from pipeline activity, marketing tools that generate campaign content from listing data. The next generation is beginning to connect directly to market data and CRM history, which means proposals will increasingly pre-populate with property-specific information automatically.

That's a reason to build good habits now. Agents who learn to work with AI — to prompt it, edit it, and slot it into a structured proposal workflow — will be best placed to take advantage of more capable tools as they arrive. The fundamentals of the job aren't going anywhere. AI just makes the supporting work faster, so you can spend more time on the work that actually wins listings.

PART V · THE MODERN EDGE

CHAPTER 11

The Modern Agent Workflow

A modern real estate agent workflow runs across five stages: prospecting and nurture, the appraisal, the pre-listing proposal, the listing presentation, and follow-up through to a signed agreement. Each stage has a job, an owner and a tool.

The CRM manages the pipeline that produces appraisals; the appraisal sets the pricing conversation; the pre-listing proposal makes the case in writing; the listing presentation delivers it in person; and disciplined follow-up converts a strong meeting into a signature.

High-performing agents in 2026 treat these as one connected sequence rather than five disconnected tasks — and they use a specific tool at each stage instead of forcing one platform to do everything.

This chapter walks through each stage, what good looks like, and the tools that support it — so you can find the weak link in your own process and fix it.

WHAT IS A MODERN REAL ESTATE AGENT WORKFLOW?

A modern real estate agent workflow is the end-to-end sequence an agent follows to convert a prospect into a won listing — from database prospecting and nurture, through the appraisal, pre-listing proposal and listing presentation, to follow-up and the signed agency agreement. Each stage uses a purpose-built tool: a CRM for the pipeline, property data platforms for pricing, and proposal software for the vendor-facing pitch.

The defining feature of the modern version is structure. Where agents once relied on a strong personality and a printed brochure, the agents winning listings today run a repeatable process where the vendor always knows what's coming next, and nothing falls through the gap between a promising appraisal and a signed listing.

STAGE 1

Prospecting and nurture

The workflow starts long before the appraisal. Prospecting and nurture is the ongoing work of building and maintaining a database — past clients, current owners, buyer enquiries and referral sources — and staying in consistent contact until someone is ready to sell.

This is CRM territory. The CRM stores every contact and interaction, automates follow-up sequences so cold leads stay warm, and gives the agent a pipeline view of who's close to a listing decision. The agents who win the most appraisals aren't necessarily the best talkers; they're the most systematic about follow-up over months and years.

Choosing the right CRM for your agency matters here. The goal of this stage is simple: a steady, predictable flow of appraisal opportunities rather than a feast-or-famine pipeline.

Each stage has a job, an owner and a tool.

STAGE 2

The appraisal

The appraisal is where a prospect becomes a live listing opportunity. The agent visits the property, assesses it against the market, and begins the pricing conversation with the owner.

The critical input at this stage is data. Comparable sales evidence from platforms like Pricefinder, CoreLogic and PropTrack underpins a credible price estimate and protects the agent from over-promising to win the listing — a tactic that backfires later in the campaign. A strong appraisal balances an evidence-based price with a clear sense of the vendor's motivation and timeline.

The appraisal is also where the next stage is set up. The best agents don't leave the meeting with a verbal "I'll think about it." They leave having told the vendor exactly what they'll receive next: a tailored written proposal. That single commitment is what separates a structured workflow from a hopeful one.

STAGE 3

The pre-listing proposal

This is the stage most agents under-invest in, and it's where listings are most often won or lost.

A pre-listing proposal is the tailored, vendor-facing document that sets out the agent's full case: comparable sales and pricing strategy, the marketing plan, fee structure, communication commitments and track record — sent to the vendor ahead of (or alongside) the listing presentation. It gives the vendor something concrete to review on their own time, share with their partner, and compare against other agents.

This is the heart of what's sometimes called proposal-first selling — structuring the listing process around a clear, tailored proposal rather than relying on a slide deck delivered on the day. It works because it respects how vendors actually decide: Australian sellers prioritise transparency, clarity of strategy and clear communication when choosing an agent. A structured proposal delivers exactly that.

STAGE 4

The listing presentation

The listing presentation is the meeting itself — where the agent presents their case in person and the vendor forms their final impression.

A modern listing presentation isn't a monologue over a printed booklet. It's a structured conversation, anchored by the proposal the vendor has already seen, where the agent listens as much as they talk and addresses the vendor's specific concerns about price, timing and marketing. The proposal does the heavy lifting on detail, which frees the meeting to build trust and answer the questions that actually decide the listing.

Preparation is everything: what you bring, how you sequence the conversation, and how you handle the fee discussion. Parts II and IV of this playbook cover this stage in depth, including the most common reasons strong agents still lose the room.

STAGE 5

Follow-up and signing

The final stage is the one most agents rush. A great presentation doesn't sign itself — the period between the meeting and the agency agreement is where momentum is either maintained or lost.

Effective follow-up is prompt, specific and low-pressure: a same-day thank you, a recap of the agreed strategy, answers to any outstanding questions, and a clear next step. Because the vendor already holds the written proposal, follow-up has something concrete to reference rather than relying on memory of a conversation. Proposal software that shows when a vendor has re-opened the document gives the agent a useful signal for timing that follow-up well.

This is where the CRM re-enters the workflow: once the agreement is signed, it resumes responsibility for managing the campaign, vendor communication and the relationship through to settlement and beyond.

Where AI fits across the workflow

AI now sits across every stage rather than in a single tool. At the prospecting stage, AI-powered CRM features draft outreach and surface the contacts most likely to transact. At the appraisal and proposal stage, AI helps generate and refine listing copy, marketing descriptions and proposal content from preset prompts. In the campaign that follows, AI supports advertising and social content.

The principle is to let AI remove admin and accelerate drafting, while the agent keeps ownership of judgement — pricing, strategy and the vendor relationship. Chapter 10 covers where it genuinely helps and where it doesn't.

The modern workflow tool stack

STAGE	JOB	TOOL
Prospecting & nurture	Build and work the database; automate follow-up	CRM (Rex, Agentbox, VaultRE)
Appraisal	Evidence-based pricing and vendor discovery	Property data (Pricefinder, CoreLogic, PropTrack)
Pre-listing proposal	Make the tailored case in writing	Proposal software (proply)
Listing presentation	Deliver the case in person	The proposal + agent preparation
Follow-up & signing	Maintain momentum to the agreement	CRM + proposal engagement tracking
Across all stages	Cut admin, speed up drafting	AI tools

The point of mapping it this way is that each stage needs the right tool. Forcing a CRM to produce proposals, or treating the appraisal as the finish line, creates the gaps that show up in listing conversion rates.

CLOSE

Do It in Minutes

You now have the method. The mindset, the preparation, the document, the meeting, the modern edge. None of it is complicated. What makes it hard is doing it consistently — producing a tailored, genuinely strong proposal before every appointment, in a week that's already full.

That's the real barrier, and it's worth naming. An agent who builds a brilliant proposal when they have time and a rushed one when they don't is, from the vendor's side, an agent whose quality varies. Inconsistency is hard to recover from once a vendor has noticed it. The whole advantage of proposal-first selling — that your best work is in the room when you're not — only holds if the standard never drops.

Your best work is in the room when you're not — but only if the standard never drops.

This is the gap purpose-built proposal software is designed to close. Not by writing the proposal for you, but by removing the overhead that makes a good one expensive to produce: the formatting, the layout, the rebuilding from scratch.

The structure is provided; you supply the property-specific content. Pricing rationale, marketing plan, comparable sales, communication commitments — populated into a consistent, professional frame and delivered as a clean digital document that works as well on a vendor's phone the next morning as it did on the kitchen table the night before.

Three things make the digital version more than a faster PDF:

- It can be **updated after it's sent** — correct a figure, adjust a recommendation, and the vendor always sees the current version.
- It can be **shared in one tap** with the partner or family member who wasn't at the meeting and who often has a deciding vote.
- It shows you **when it's been opened and which sections held attention** — turning follow-up from guesswork into an informed conversation.

An agent who can see a vendor spent twelve minutes on pricing and thirty seconds on marketing knows exactly where to focus the next call.

There's a simple way to think about it: the proposal you send is the agent experience the vendor has when you're not in the room. If it loads slowly, looks dated, or makes them download a file before they can read it, that's the impression you've left at the exact moment you wanted engagement. If it's clear, current and effortless to share, that's the impression instead.

proply is built for this — purpose-built proposal software for Australian agents, designed around the listing workflow rather than adapted from a generic document tool. It exists to make proposal-first selling feasible at the pace your business actually runs at: a tailored, professional proposal on every appraisal, not just the ones you had a quiet afternoon to prepare for.

You don't need it to use this playbook. The method stands on its own — work the checklist, build the document, run the meeting. But if the thing standing between you and a higher conversion rate is time rather than knowledge, that's exactly the problem the right tool removes.

Win the listing before the agreement is signed. Then do it again next week, just as well.

See how proply works — book a demo, or start a free trial — at proplyapp.com.au.

APPENDIX

Questions Agents Ask

A consolidated reference for the questions that come up most often. The detail behind each answer is in the relevant chapter.

What should a real estate proposal include?

At a minimum: a property overview and campaign objective, a pricing strategy backed by comparable sales, a tailored marketing plan, a vendor communication plan, your credentials and recent local results, and a clear statement of fees and next steps. The proposal should be specific to the vendor's property — not a generic document handed to every prospect.

How long should a real estate proposal be?

Long enough to cover every section clearly, short enough that a vendor reads it in full. For most residential properties, four to six pages is right. A proposal that runs much longer is usually an unedited template rather than a tailored document.

Should proposals be printed or digital?

Lead with digital. The proposal-first method depends on the document continuing to work after you leave — and only a digital proposal can be shared with the partner who wasn't there, updated after it's sent, and reviewed at the vendor's pace. A printed copy is a useful leave-behind at the meeting, but treat it as the backup; the digital version, sent the same evening, is the one that does the deciding.

Should the proposal be prepared before or after the appointment?

Before. Bring a prepared draft built on your appraisal knowledge and pre-meeting research, use the conversation to refine it, then send the finalised version the same evening. Preparing it beforehand turns the meeting into a structured walkthrough rather than a promise to "send something through."

How long should a proposal take to write?

For a well-prepared agent working from a clear brief, one to two hours — most of it in the pricing analysis and marketing plan, the sections that need genuine thinking. Purpose-built software reduces this by removing the formatting and document-assembly time.

Can I reuse strong proposal sections across proposals?

You can reuse structure and framing, but the substance must be tailored. The comparable sales, price range and method recommendation have to reflect this property's specific position. Reusing marketing language across properties with different buyer profiles is where reuse becomes a problem a vendor can feel.

How do I know if my proposals are strong enough?

Compare your conversion rate to your appointment rate. If you're winning fewer than two-thirds of the listings you present for, the proposal may be contributing to the gap. Ask vendors who chose someone else what influenced the decision — the feedback is usually more specific than agents expect.

What's the difference between a proposal and a listing agreement?

A proposal explains your strategy and approach. A listing agreement is the legal document authorising you to sell the property. The proposal precedes the agreement and forms the basis for the vendor's decision to sign it.

How long should a listing presentation take?

Between 45 and 75 minutes for most residential properties. Under 45 usually means something important was skipped; over 90 risks losing the vendor's attention. If you're consistently running long, look at how much time goes into the opening stages versus the pricing and marketing.

When is the right moment to discuss fees?

After the vendor understands your pricing rationale and marketing strategy — Stage 5 of the run-sheet. Fees raised before that context exists are just a number. Raised after the vendor has seen the value, they're a reflection of it. Avoiding the topic looks evasive; leading with it looks transactional.

How do I handle a vendor who takes over the meeting?

Use the agenda you set at the open to steer back: "That's a great point — I want to make sure we reach the marketing plan, so let me cover that and we'll come back to this." Vendors who dominate early are often anxious about the process. Acknowledging the concern while holding structure is the most effective response.

How do I recover from a listing presentation that went badly?

Follow up with a well-prepared proposal the same evening if you didn't leave one: "I've put together the proposal we discussed, including the pricing rationale and marketing plan." A clear document sent promptly can recover ground that felt lost in the room — vendors respond to the signal that you followed through.

What do vendors care about most when choosing an agent?

Trust, pricing strategy and marketing plan — roughly in that order. Reputation and honesty are the top selection factors, and in the Australian market transparency ranks above technical skill. Commission matters, but it's rarely the deciding factor once an agent has clearly explained their process and demonstrated local expertise.

Is a lower commission ever the reason an agent wins a listing?

Occasionally, but less often than agents assume. Most vendors will pay a fair commission to the agent they trust most. Discounting often signals that the agent doesn't believe their service is worth the standard rate — not a confidence-building message.

Do agents need proposal software?

You can build proposals in Word or PowerPoint. Dedicated tools save significant time and produce more consistent results — the real advantage being the ability to tailor each proposal quickly and to see how vendors engage with it. If you produce one or two proposals a month and have time to do each carefully, a strong template may be enough.

Will AI replace real estate agents?

No. AI is effective at content creation, data summarisation and drafting. It can't replace the judgement, relationships and local expertise that define a good agent. Agents who use AI well will outperform those who don't — but it's a tool, not a replacement.

Is AI-generated content good enough to send to vendors?

As a first draft, yes. As a finished product, rarely. AI produces competent content quickly but lacks the local knowledge, personal tone and specific accuracy vendors expect. Use it for the first 80 per cent and apply your expertise to the final 20.

THE WORKING DOCUMENTS

Toolkit

The rest of this playbook is the thinking. This is the doing. What follows are three working documents: a proposal template, a listing-presentation run-sheet and a pre-listing checklist. They're built to be used — printed and filled in by hand, or copied into your proposal tool as a starting structure. Each one turns a principle from the book into something you can put in front of a vendor, or work through before you walk in. A note on all three: the template gives you the skeleton; you supply the substance. The fields prompt the thinking. If a section could apply to any property in the suburb, it isn't finished.

TOOLKIT 1

Real Estate Proposal Template

A repeatable structure for every listing. Fill each field with property-specific detail. Anything in [brackets] is a prompt, not text to leave in.

1 · COVER AND PROPERTY DETAILS

Vendor name(s): ______________________________

Property address: ______________________________

Prepared by (agent / agency): ______________________________

Date of preparation: ______________________________

2 · PROPERTY OVERVIEW AND CAMPAIGN OBJECTIVE

Two or three sentences, from a buyer's perspective. End with the specific outcome you're aiming for and why it's achievable.

This property is ______________________________

____

Our campaign objective is to achieve [result] within [timeframe], targeting [buyer profile].

3 · PRICING STRATEGY AND MARKET ANALYSIS

The most scrutinised section. Explain the comparables — don't just list them.

Current market conditions in [suburb]: ______________________________

Comparable sales:

ADDRESS	SOLD DATE	PRICE	WHY IT'S RELEVANT TO YOUR PROPERTY

Recommended price range: ______________________________

Recommended method of sale: ☐ Private treaty ☐ Auction ☐ Expressions of interest

Reasoning: ______________________

4 · MARKETING STRATEGY

Start with the buyer. Every decision below should connect back to reaching them.

Primary buyer for this property: ______________________

Portal advertising (tier + duration + why): ______________________

Photography / video / floor plan: ______________________

Digital and social advertising: ______________________

Database and off-market outreach: ______________________

Open home / inspection plan: ______________________

5 · VENDOR COMMUNICATION PLAN

Write commitments, not intentions. "You will receive...", not "we pride ourselves on..."

Campaign updates: every ______________________ by ______________________ (format: ______________________)

After each open home: ______________________

When an offer is received: ______________________

6 · AGENT CREDENTIALS AND LOCAL RESULTS

Two or three recent, relevant results — same suburb or price range. Evidence, not biography.

ADDRESS / AREA	RESULT	DAYS ON MARKET	NOTE

Testimonial (optional, relevant to this vendor's concern): ______________________

7 · FEES AND MARKETING COSTS

Commission: ______________________ What it covers: ______________________

Recommended marketing budget (line items): ______________________

Proposed campaign timeline: ______________________

8 · NEXT STEPS

Always close with a specific action. A proposal with no next step asks the vendor to start the next conversation — and many won't.

The next step is: ______________________

By: ______________________

TOOLKIT 2

Listing Presentation Run-Sheet

The meeting, in six stages. This is how you run it — not a script to read, a sequence to keep you in control. Use the prompts; fill the blanks before you arrive where you can.

STAGE 1 · OPEN AND SET THE AGENDA (2–3 MIN)

- Thank them; state the structure: "I'll start by understanding what you want from this, then walk you through the market, the marketing plan, and the proposal I've prepared."

Confirm time available and who else is joining: ______________________

- [ ] Do **not** open with agency stats or your personal history.

STAGE 2 · UNDERSTAND THE VENDOR'S GOALS (5–10 MIN)

Ask before you present anything. The answers reshape everything that follows.

Why are you selling, and is the timing fixed or flexible? ______________________

What matters most — price, certainty, speed, minimal disruption? ______________________

Spoken to other agents? What has that told you? ______________________

STAGE 3 · MARKET DATA AND PRICING (10–15 MIN)

- Set the context: current conditions in the suburb.
- Walk the comparables — why each one, what it tells you.
- Give a recommended range with reasoning, not just a number.
- Address any gap between expectation and evidence here, with data.

Recommended method of sale + why: ______________________

STAGE 4 · MARKETING STRATEGY (10–15 MIN)

- Lead with the buyer profile, then connect every decision back to it.
- Cover portals, photography, digital/social, database, open homes, reporting.
- Explain the why behind each choice — it's how you earn budget support.

STAGE 5 · THE PROPOSAL AND FEES (5–10 MIN)

- Walk them through the proposal — don't just hand it over.
- Confirm each section reflects what you discussed.

- State the commission directly, explain what it covers, hold it.
- Clarify what happens next: agreement, photography, launch.

STAGE 6 · CLOSE AND CONFIRM THE NEXT STEP (5 MIN)

- Ask if there are remaining questions on pricing, marketing or the proposal.
- Confirm their decision timeline and whether they're seeing other agents.
- Propose a **specific** next step — not "we'll be in touch."
- Send the digital proposal within the hour (and leave a printed copy if you brought one).

Agreed next step: ______________________ Date/time: ______________________

TOOLKIT 3

The Pre-Listing Checklist

Everything to work through before the appointment, in priority order. If time is short, work top to bottom — a strong CMA and clear pricing carry you further than a polished proposal with weak numbers behind it.

Step 1 — Research the property

- [ ] Land size, build year, beds/baths/parking, notable features
- [ ] Title, encumbrances, easements (if accessible)
- [ ] Zoning and development potential or restrictions
- [ ] Sales history — previous prices, hold period, past campaigns
- [ ] Presentation issues that affect buyer perception and price

Step 2 — Prepare the CMA

- [ ] Comparable sales, last 60–90 days (Pricefinder / CoreLogic / PropTrack)
- [ ] Five to eight genuine comparables, adjusted for real differences
- [ ] Current active listings — the competition for the same buyers
- [ ] Days-on-market trend for the suburb and property type
- [ ] A clear price range with a defensible rationale

Step 3 — Prepare the pricing conversation

- [ ] The vendor's likely expectation, and where it came from
- [ ] A plan for the gap, if one exists, between expectation and evidence
- [ ] Method-of-sale recommendation, ready to explain
- [ ] Your position on pricing strategy and its trade-offs

Step 4 — Build the marketing plan

- [ ] Primary buyer profile identified
- [ ] Portal strategy selected and justified
- [ ] Photography and copywriting approach
- [ ] Digital / social advertising plan
- [ ] Database / off-market outreach
- [ ] Open home and inspection plan
- [ ] Vendor reporting frequency and format

Step 5 — Structure the conversation

- [ ] Opening and agenda decided

- [ ] Sequence set: goals → context → data → pricing → marketing → proposal → next steps
- [ ] Likely objections prepared
- [ ] Close planned, including the "we need to think about it" response

Step 6 — Prepare the proposal document

- [ ] Specific to this property — not a template with the address swapped in
- [ ] Pricing rationale, marketing summary, fees, sales process included
- [ ] Built to send digitally (shareable, updatable, trackable); printed copy optional
- [ ] Proofread the night before — errors undermine everything the document is trying to do

SOURCES

Sources and Further Reading

Sources

The vendor-behaviour claims in this playbook draw on two ongoing research sources:

- **NAR Profile of Home Buyers and Sellers** — vendor decision factors and agent selection criteria. https://www.nar.realtor/research-and-statistics/research-reports/highlights-from-the-profile-of-home-buyers-and-sellers
- **REA Group Property Seeker Survey** — Australian consumer expectations; honesty and transparency as top vendor priorities. https://www.realestate.com.au/insights

Property data platforms referenced for CMA preparation include Pricefinder, CoreLogic and PropTrack.

Further reading

The proply blog covers the adjacent ground this playbook deliberately left out — the software and technology decisions that sit around the proposal. For agents who want to go deeper, the full series at **proplyapp.com.au/blog** includes guides on real estate software for agents, proposal software versus generic tools, CRM versus proposal software, choosing a real estate CRM in Australia, and AI tools and marketing for agents.

The Listing Proposal Playbook is published by proply — proposal software designed to help Australian agents win the listing before the agreement is signed. proplyapp.com.au