

FROM THE LISTING PROPOSAL PLAYBOOK

The Listing Proposal Toolkit

The working documents — a proposal template, a run-sheet and a pre-listing checklist. Built to print and fill in.

proply[®]

PROPOSAL-FIRST SELLING

Inside the toolkit

Three working documents. Print them, fill them in, and put them in front of a vendor — or work through them before you walk in.

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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