



# The Listing Presentation & Matrix CMA

# Agenda

- **Before the listing appointment:**
  - Tips to polish your interviewing skills
  - What to bring on your listing appointment
  - Review criteria for comparable homes
- **Demonstrate the CMA tools in Matrix**
  - Public records searching
  - Map searching
  - Matrix CMA strategies
- **Crafting and customizing the CMA**
  - Adding photos
  - Branding
  - Data
  - Real Estate Tips for your seller
  - Finishing touches



# Mastering the CMA

This course gives MLS subscribers tips, strategies and tools on crafting a data-driven CMA using the Matrix system



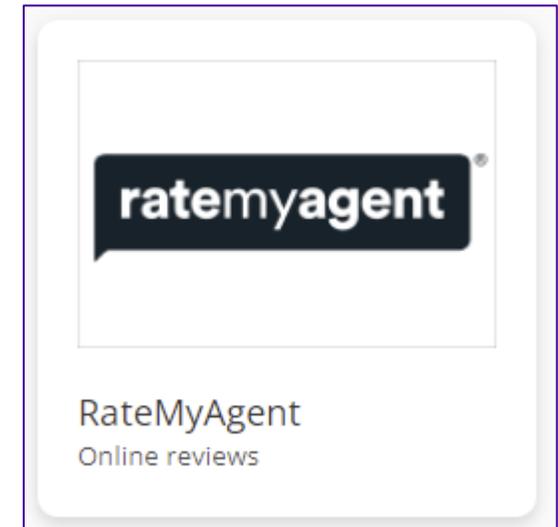
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**The most important part of the listing presentation is your connection with the homeowner.**



# Professionalism

- ❖ Dress for success
- ❖ Be prepared and on-time...don't forget a pen!
- ❖ Have your resume ready
  - ❖ Sales experience
  - ❖ Market knowledge
  - ❖ Research you have conducted
  - ❖ Professional referrals



# Listening takes Practice

Ask questions but then *REALLY* listen to the goals of the seller

## ***Example questions / conversation starters....***

- ❖ What makes your home unique and special?
- ❖ What do you enjoy the most about your neighborhood or location?
- ❖ What emotions are you having regarding selling their home?
- ❖ Where are you going and why have you decided to move there?
- ❖ What are your expectations regarding the list price and the time will take to sell?

## ***Be intentional in your listening***

- ❖ You should remember their answers and be able to discuss their responses at future meetings

## ***Every seller is unique***

- ❖ identify their individual goals

# Bragging Rights!

*Let the homeowner show you what makes their home special  
Encourage the homeowner to give you a complete tour.*

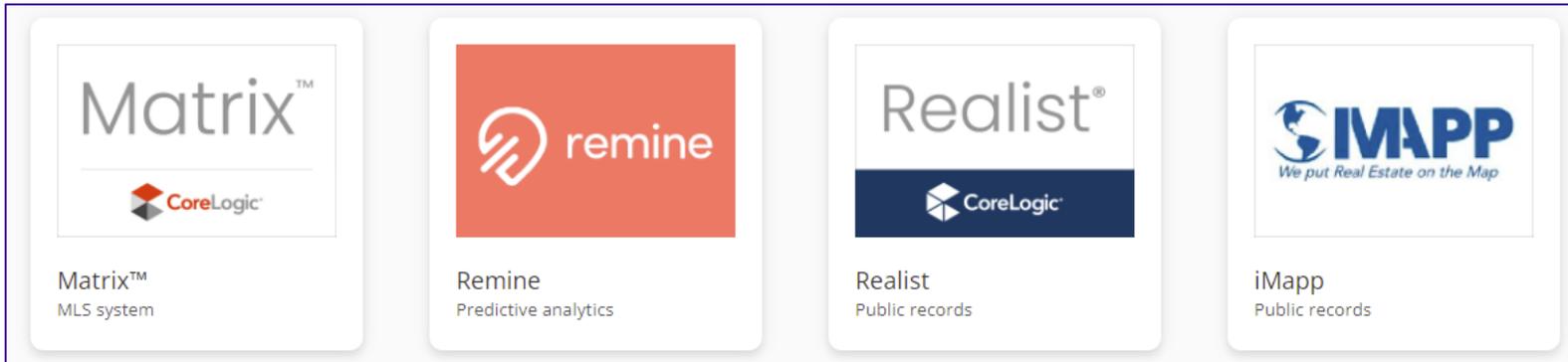
- ❖ Visit every room
- ❖ Don't forget the garage
- ❖ Find something positive to say about each room
- ❖ Examples: *"I love the paint color you chose"*  
*"This room has a cozy feel"*  
*"Nice ceiling fans!"*
- ❖ ***Notice the small details in their home***



# Research:

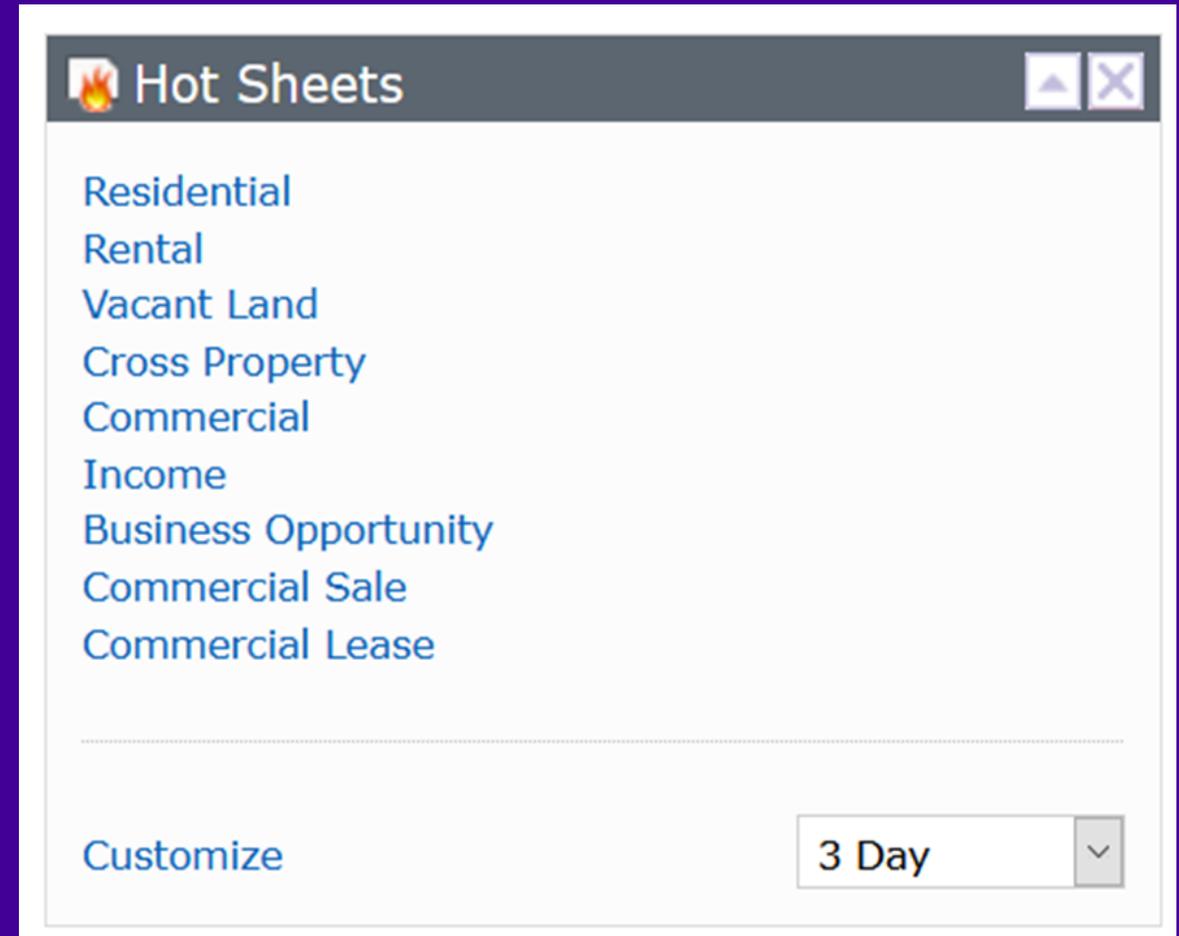
## More is always better! Where to begin?

- ❖ property address
- ❖ public records search
- ❖ listing history search
- ❖ drive by



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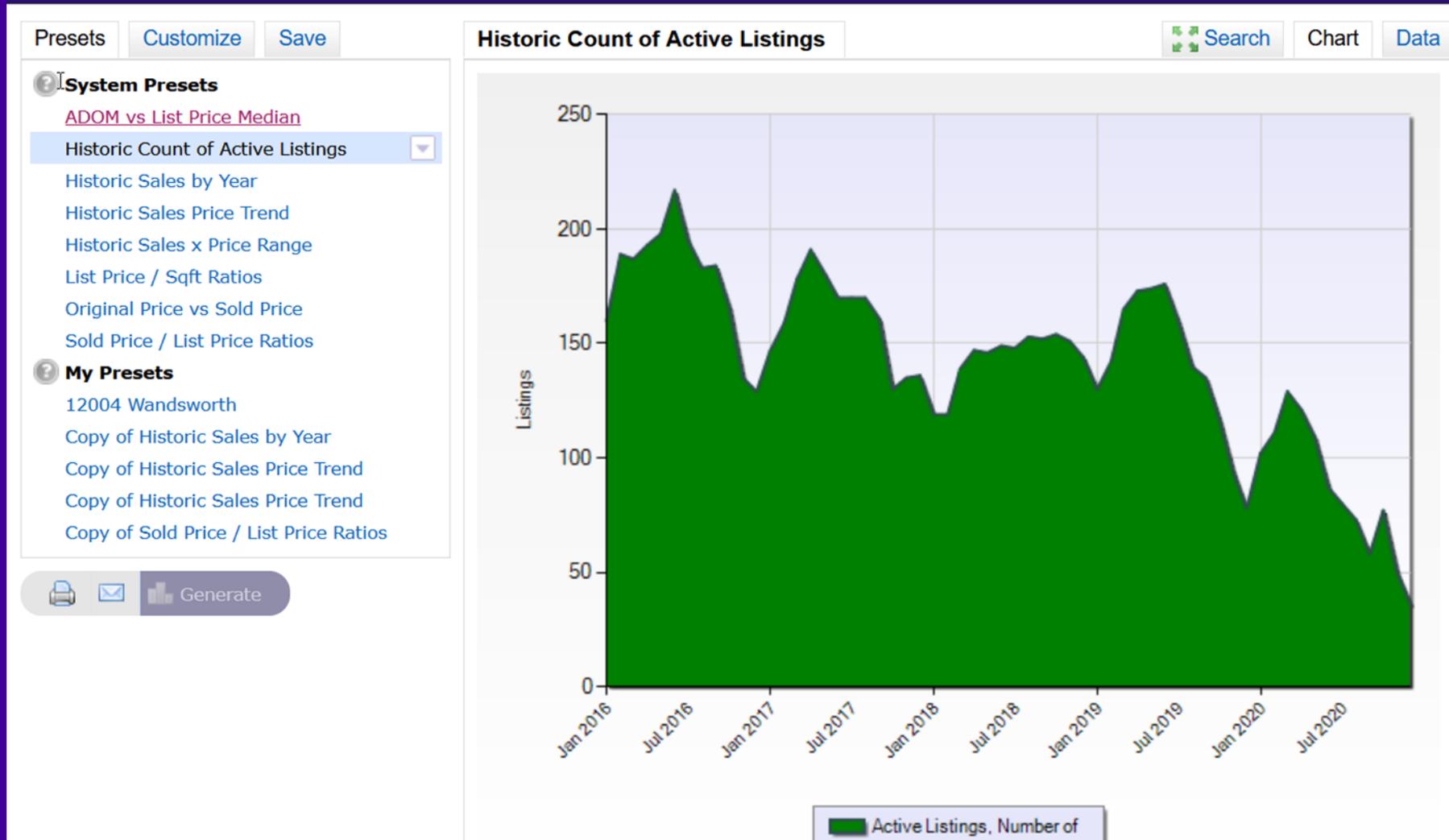
# Market Research: Hyperlocal Experts make Widgets work for them



# Hyperlocal Experts make Widgets work for them

 My Favorite Searches		
1-2 acres of vacant land: Odessa	(7 New)	Manage
500-650; Lutz, Inrix drive time,...	(4 New)	Manage
Commercial Town n Country	(0 New)	Manage
Downtown Tampa Condos sold i...	(16 New)	Manage
For lease in Westchase	(11 New)	Manage
Port Charlotte 3+ 33954	(0 New)	Manage
Tampa rentals 1500-1900 per ...	(102 New)	Manage
Winter Haven 2000-2500	(0 New)	Manage

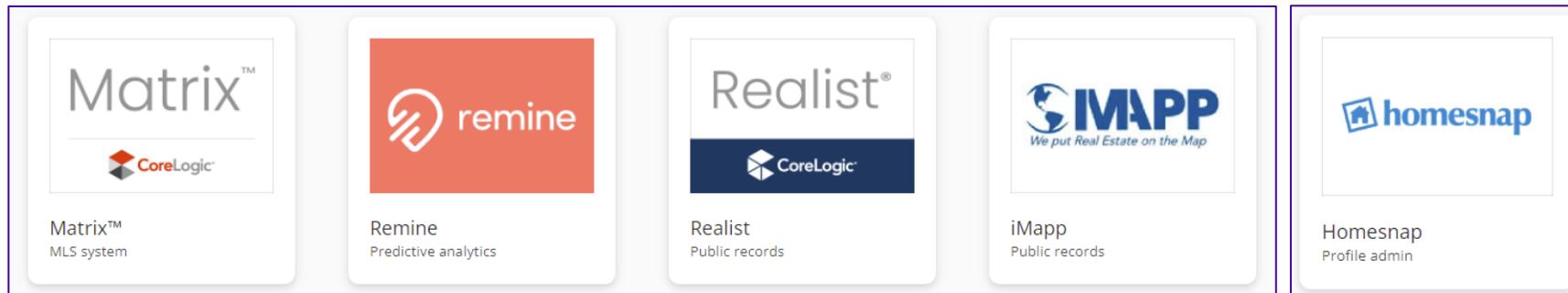
# Hyperlocal Experts make Widgets work for them



# Research:

## *What am I looking for? Details!*

- ❖ square footage
- ❖ lot size
- ❖ pool information
- ❖ days on market for the area
- ❖ average price per square footage
- ❖ school zones



# What to bring on your listing presentation

## Brokers authorized listing agreement

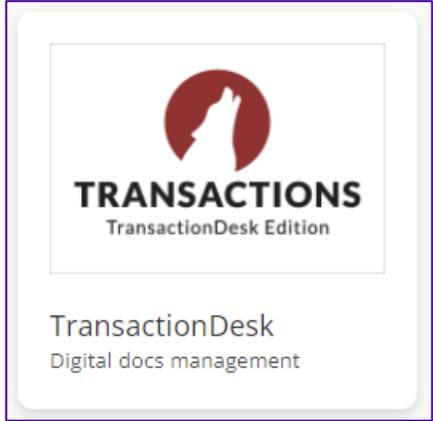
**Exclusive Right of Sale Listing Agreement** FloridaRealtors®

1 This Exclusive Right of Sale Listing Agreement  
2\* \_\_\_\_\_ ("Seller")  
3\* and \_\_\_\_\_ ("Broker").

4 **1. Authority to Sell Property:** Seller grants to Broker the sole and personal  
5 property (collectively "Property") de \_\_\_\_\_ beginning  
6\* \_\_\_\_\_ and term \_\_\_\_\_ (Termination Date"). Upon  
7 full execution of a contract for sale a \_\_\_\_\_ of this Agreement will  
8 automatically extend through the date of \_\_\_\_\_ Seller and Broker acknowledge  
9 that this Agreement does not guarantee a sale. \_\_\_\_\_ to any person without regard to race,  
10 color, religion, sex, handicap, familial status, national origin, \_\_\_\_\_ or other factor protected by federal, state, or local  
11 law. Seller certifies and warrants that she/he/it is lawfully entitled to convey the Property and all improvements.

12 **2. Description of Property:**  
13\* (a) Street Address: \_\_\_\_\_  
14 \_\_\_\_\_  
15\* Legal Description: \_\_\_\_\_  
16\* \_\_\_\_\_  See Attachment \_\_\_\_\_  
17\* (b) Personal Possessions: \_\_\_\_\_

Talk to your Broker!



# What to bring on your listing presentation

## ➤ Residential Listing Data Entry Form

**StellarMLS**  
RESIDENTIAL LISTING DATA ENTRY FORM

■ Indicates Multiple Choice   ● Indicates Single Choice   \* Indicates Required Field

**LISTING INFORMATION**

**List Date\*** [Text Field]   **List Price\*** [Text Field]   **Expiration Date\*** [Text Field]   **Special Sale Provision\***

Auction  
 Bank-Owned/REO  
 Short Sale  
 None

**Listing Type\***   **Listing Service Type\***   **Representation**

Exclusive Agency    Exclusive Right to Sell    Full Service    Seller Represented  
 Exclusive Right with Exception    Exclusion/Variable Commission    Limited Service    Seller Not Represented

**ADDRESS**

**Street Number\*** [Text Field]   **Street Dir Pre** [Dropdown: East]   **Street Name\*** [Text Field]   **Street Type** [Text Field]   **Street Dir Post** [Dropdown: East]

**Unit Number** [Text Field]    No Unit #   **City\*** [Text Field]   **State\*** [Dropdown: AL]   **Zip\*** [Text Field]   **Zip + 4** [Text Field]

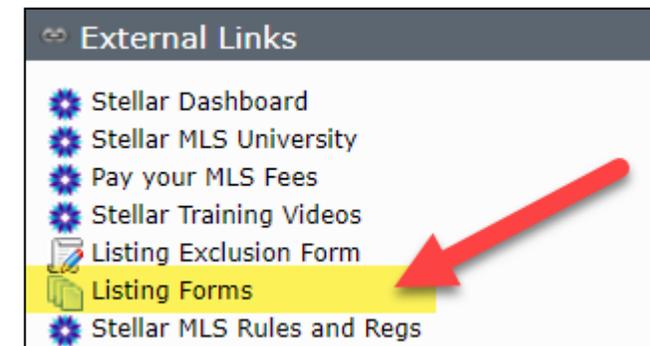
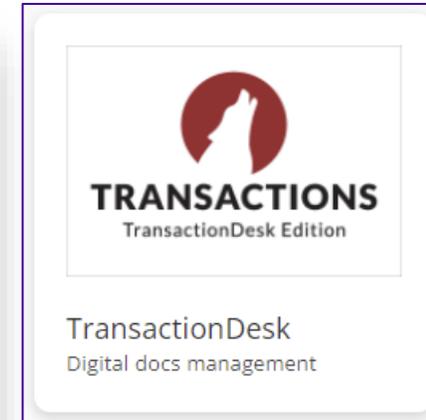
**County\*** [Text Field]   **Country\*** [Text Field]

**Floors in Unit/Home\***   **Floor Number** [Dropdown: 1]   **Total # of Floors** [Text Field]   **Building Name/Number** [Text Field]   **Building Elevator**    Yes    No

Multi/Split    One  
 Two    Three or More

**SOUTHWEST**

**SW Subdv Condo Number** [Text Field]   **SW Subdv Community Name** [Text Field]



# What to bring on your listing presentation

- Sellers Net Sheet & a Calculator: Ask your Broker which one they prefer

## Seller's Estimated Net Proceeds

### Seller's Financial Information

Name	
Address	
City	
State	
Zip Code	
Phone Number	
Closing Date	01/11/2021

### Existing Financing

Sale Price (option 1)	\$	
Sale Price (option 2)	\$	
Sale Price (option 3)	\$	
Present Mortgage Payoff	\$	
Credit Line, Home Improvement Loan, etc.	\$	

### Government Expenses

Special Assessments	\$	
State Deed Tax	\$	
Recording Fee	\$	
Annual Taxes	\$	
Annual Taxes: Months to Escrow	0	
Taxes Pro-rated	\$	
Municipality Connection Fee	\$	
Building Inspection Fee	\$	

### Lending Costs

Seller Paid Closing Costs	\$	
VA Fees	\$	

### Other Expenses

Homeowner's Warranty	\$	
Updating Title (Abstract/RPA)	\$	
Settle/Closing Fee	\$	
Listing Broker's Fee %		%
Listing Broker Fee	\$	
Selling Broker's Fee %		%
Selling Broker Fee	\$	
Total Broker's Fee	\$	
Broker Administrative Fee	\$	
Well Disclosure Fee	\$	
Conservation Fee	\$	
Other	\$	
Estimated Seller's Proceeds	\$	

# What to bring on your listing presentation

## Comparative Market Analysis

Start Pages Subject Cover Comparables Map Adjustments Pricing Finish Autosaved at 01/11/2021 11:09:30 AM

### Select CMA Contact

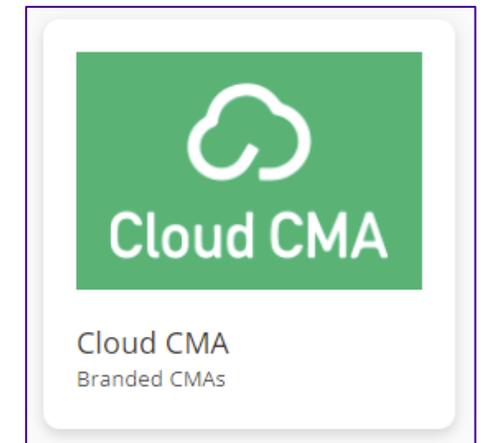
Welcome to the CMA Wizard. Use this Start page to select your Contact. Use the above Navigation Bar to navigate through the steps.

Select Contact Name:  [Create a New Contact](#)

Select CMA Language:

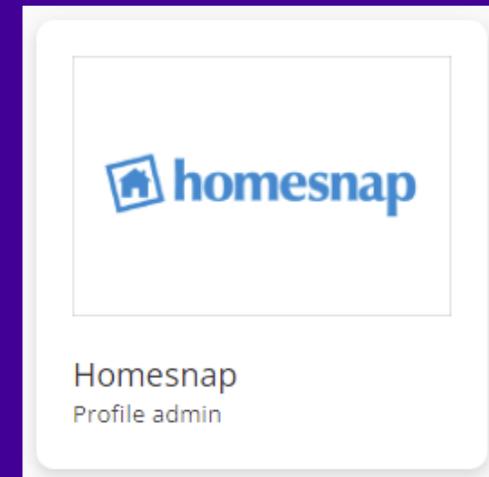
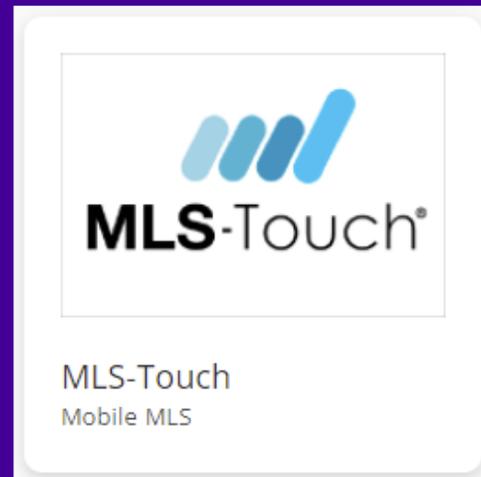
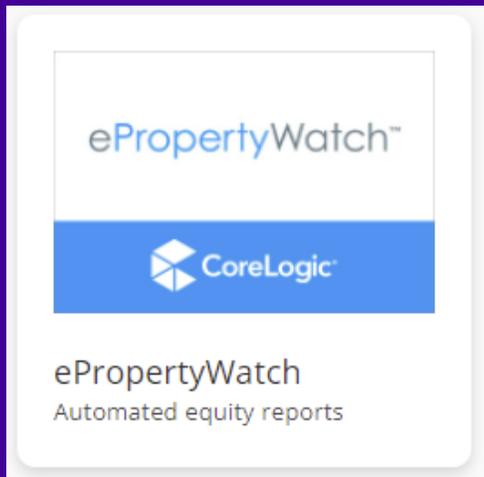
Description:

**Please Note:** This CMA will be saved for 365 days from the Last Modified date and then automatically be deleted. If you need to keep it longer, modify the CMA before the end of the 365 day period or save a copy of the generated PDF to your computer (you should do that anyway).



# What to do if the seller needs to think it over?

*\*Set them up on an auto-email immediately to keep them updated on their local competition\**



*Get these digital tools connecting you to your customer asap!*

# CMA vs Appraisal...what's the difference?

## ❖ CMA

- Prepared by a licensed Broker or an Agent
- Determines fair market value
- Evaluates and compares active listings
- Considers local market conditions

VS

## ❖ Appraisal

- Bank process
- Prepared by a licensed appraiser is state certified
- Ensures the bank is not lending too much for the home

# What is the minimum number of comparable properties should you include?

- ❖ 3 Active Listings
- ❖ 3 Pending Sales
- ❖ 3 Recent Sales
- ❖ 1 Expired / Withdrawn listing
  
- ❖ More is better...find a good balance



# Adjustments on a CMA?

Start

Pages

Subject

Cover

Comparables

Map

Adjustments

Pricing

Finish



Always adjust the comparable property **Never the subject**

+ for features the subject has that the comparable does not

- For features the subject has that the comparable has



Subject:  
4  
Bedrooms  
3  
Bathrooms



Comparable:  
3 Bedrooms  
2 Bathrooms  
+  
an amount determined  
through market data  
research

# When determining a homes valuation there are 2 main factors:

❖ Competition

❖ Condition



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# Other variables to consider for CMA's

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- ❖ Location
- ❖ Size / Square Footage
- ❖ Condition
- ❖ Lot size
- ❖ Pool
- ❖ Bedrooms
- ❖ Bathrooms
- ❖ Garage
- ❖ Community Features

# Kitchen Upgrades: The Heart of the Home



# Location: A view or a privacy fence?



# Let's start learning how to create a CMA in Matrix



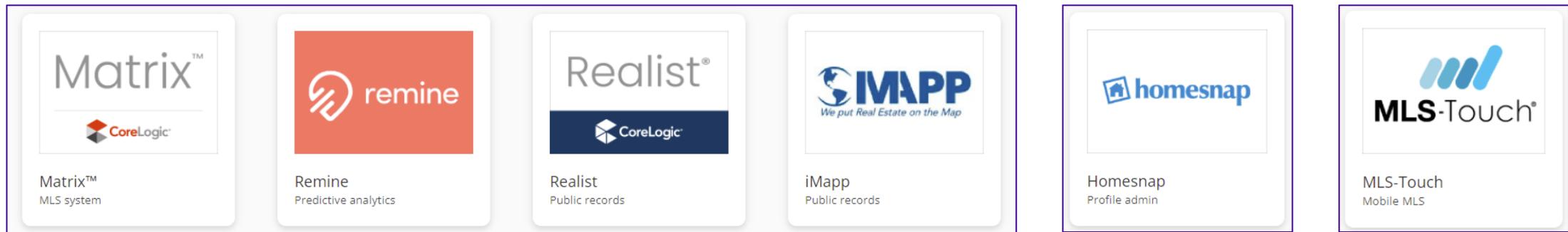
Universal Clear  
Front Report Cover,



# Research:

## *What am I looking for? Details!*

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1



Search the MLS

2



Tax

Realist

iMapp

Public Records



## My Matrix

[Home](#)

[Summary](#)

[Contacts](#)

[Auto Email](#)

[Saved Searches](#)

[Sent Email](#)

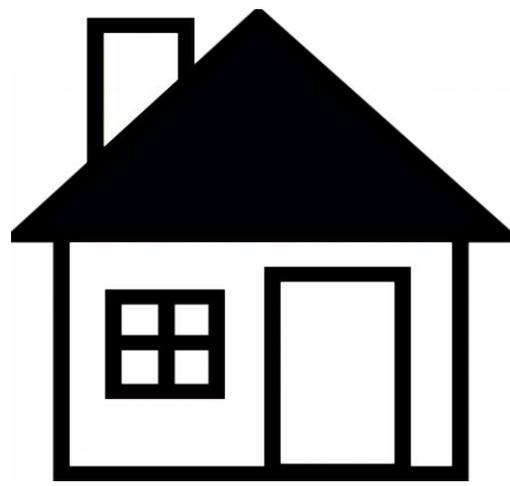
[My CMAs](#)

# From a Listing You can View Comparable Properties

Previous Next · 1 of 4 Checked 0 All · None · Page Agent Single Line display Display 360 Property View at 1 per page

973 SHERRINGTON ROAD, ORLANDO, Florida 32804

[View Comparable Properties](#)



# Comparables Report

Subject Property: **973 Sherrington ROAD**

Selected Pages: **Brief Summary; CMA Map**

[Back to Results](#)
[Create CMA](#)
[Email](#)
[View Report](#)

# Summary

20 Comparables	Low	Median	Average	High
<b>Comparable Price</b>	195,000	323,700	320,074	479,500

Previous Next · **1-20** of **20** · Checked **0** · All · None

Display **360 Grid** at **50** per page

<input type="checkbox"/>	Distance ↓	Address	APN	ML #	Status	Status Date	Status Price	Property Ty	Property Sub Ty	Beds
	0.0 mi	973 Sherrington Road, Orlando, Flo	10-22-29-0688-0	O5912952				RESI	SingleFamilyRes	3
<input type="checkbox"/>	0.0 mi	<a href="#">976 W Fairbanks AVENUE, Orlando</a>	<a href="#">10-22-29-0688-0</a>	<a href="#">S5052984</a>	Active	07/04/2021	\$290,000	Residential	Single Family R	3
<input type="checkbox"/>	0.1 mi	<a href="#">4365 Shorecrest DRIVE, Orlando FL</a>	<a href="#">10-22-29-0688-0</a>	<a href="#">O5935983</a>	Sold	06/02/2021	\$395,000	Residential	Single Family R	3
<input type="checkbox"/>	0.2 mi	<a href="#">919 Canovia AVENUE, Orlando FL 3</a>	<a href="#">03-22-29-8480-0</a>	<a href="#">O5954662</a>	Active	06/28/2021	\$325,000	Residential	Single Family R	3
<input type="checkbox"/>	0.2 mi	<a href="#">4150 Edgewater DRIVE, Orlando FL</a>	<a href="#">10-22-29-0000-0</a>	<a href="#">O5932869</a>	Sold	05/21/2021	\$315,000	Residential	Single Family R	3
<input type="checkbox"/>	0.3 mi	<a href="#">1115 Naples DRIVE, Orlando FL 328</a>	<a href="#">29-22-03-8476-0</a>	<a href="#">O4712282</a>	Non-MLS Sale	05/14/2021	\$255,000	Residential	Single Family R	3
<input type="checkbox"/>	0.4 mi	<a href="#">1011 Timor AVENUE, Orlando FL 32</a>	<a href="#">03-22-29-8476-0</a>	<a href="#">O5950931</a>	Pending	07/07/2021	\$259,000	Residential	Single Family R	3
<input type="checkbox"/>	0.4 mi	<a href="#">913 Carlson DRIVE, Orlando FL 328</a>	<a href="#">03-22-29-8476-0</a>	<a href="#">O5943879</a>	Sold	07/06/2021	\$195,000	Residential	Single Family R	3
<input type="checkbox"/>	0.5 mi	<a href="#">1008 Venetian AVENUE, Orlando FL</a>	<a href="#">29-22-10-8828-0</a>	<a href="#">O5953764</a>	Non-MLS Sale	05/25/2021	\$328,700	Residential	Single Family R	3
<input type="checkbox"/>	0.5 mi	<a href="#">1126 Neuse AVENUE, Orlando FL 32</a>	<a href="#">03-22-29-8476-0</a>	<a href="#">O5941523</a>	Sold	06/14/2021	\$225,000	Residential	Single Family R	3
<input type="checkbox"/>	0.5 mi	<a href="#">5115 Adanson STREET, Orlando FL</a>	<a href="#">02-22-29-8472-0</a>	<a href="#">O5920622</a>	Canceled	05/21/2021	\$219,900	Residential	Single Family R	3
<input type="checkbox"/>		<a href="#">FL 03-22-29-0000-0</a>	<a href="#">O5955332</a>	Active		06/30/2021	\$275,000		Single Family R	3

[Remove Selected](#)
[Find more Comparables](#)

[Previous](#)
1
[Next](#)

# Subject Property

---

1313 RADCLYFFE ROAD, ORLANDO, Florida 32804

## **Subdiv:** RADCLYFFE TERRACE SUB

- Year built: 1953
- List Price: \$435,000
- Square footage: 1,633
- Bedrooms: 3
- Bathrooms: 2
- Real AVM: **\$436,000**

RealAVM™ Range

\$379,320 - \$492,680

# SUPPORT OR QUESTIONS

For help with compliance notifications, rules and regulations, feel free to contact us!

Toll Free: (800) 686-7451

Local: (407) 960-5300

Email: [support@stellarmls.com](mailto:support@stellarmls.com)

Hours: Mon.-Fri. 8:00 A.M.-6:30 P.M.  
Saturday 8:00 A.M.-6:00 P.M.

