



## I have a Listing Appointment, Now What?

### Course Objective:

This course is designed to guide you through research and preparation for your first and every listing appointment. You will learn steps to create a professional listing presentation marketing yourself as the perfect agent match.

***\*Listing Appointment Preparation Checklist\* is an additional document resource for this course***

You have scheduled your listing appointment with a potential seller. You want to secure the listing and show the seller you know your market, how to get their home sold, and that you are the best agent for the job. The first thing you will want to do is take a drive past the property and take a photo of the home's front exterior. This can be useful when customizing the presentation report for your customer. It can also be used as the initial photo required when entering a listing. Note: you will want to make sure that the photo is free from any agent, broker, or company branding or signage.



### Recommendations for Front Exterior Photo

- Photo should be free of agent, broker, or company branding/signage
- Landscaping should be clear of overgrowth and/or debris
- Yard should be clear of toys, bicycles, or anything other than what is part of the landscape
- Ensure the photo is in focus and illustrates the entire front portion of the property.

As a member of Stellar MLS, you have access to multiple public record databases. Realist and IMap are the two products that are provided to you as part of your subscription. Using these two products when preparing for your listing appointment will allow you to verify ownership, gather historical and current tax information, and any additional property details that may be beneficial for you. These reports can be pulled prior to your listing appointment. They will assist you in your presentation and demonstrate your proficiency, organization, and knowledge of your market.

## Realist

The Realist product can be used for many different reports. We will highlight two reports that can be beneficial to you when preparing for a listing appointment. The first report is the Property Details report. To access this report, you will want to launch into Realist from your Products and Services section of Stellar Central. Once Realist has opened to the search dashboard, you can enter in the criteria for the listing you are interested in researching. Below are the steps to take in order to complete your search

1. You will want to adjust the county in which you are pulling the public record for. This can be found in the upper left-hand corner. You will select the Change County tab and select the appropriate county for your listing.
2. Underneath the Change County tab, you will select the Quick Search option. From here, you will enter in the address for the listing that you are wanting to pull information for.
3. Select the Search button at the bottom right of the search window.
4. Once the address for the listing has been pulled, you will select the listing by using the square checkbox to the left of the listing and selection Reports in the bottom right corner of the page.

The screenshot displays the StellarMLS Realist search dashboard. At the top, the user is logged in as Jennifer Welling. The dashboard is set to Pasco, FL, and the 'Change County' tab is selected. The search form on the left includes fields for Address (123 Main St, City, State Zip), Owner (Last, First OR Corporate Name), MLS Listing Number, and Folio or PID. A 'Search' button is located at the bottom right of the form. A map on the right shows a street grid with a red pin and a 'Parcel' button. Below the map is a table with columns for Address, Property City, Property ZIP, and County. A 'Reports' button is in the bottom right corner of the table area. Red arrows point to the 'Change County' tab, the address input field, the 'Search' button, and the 'Reports' button.

Once you have the reports pulled up for your listing, there are several different reports that will populate. We are going to highlight two of the reports for this class. Keep in mind, you have access to all the reports available and can review them in more detail and decide if there are other reports that you would like to include.

The first report we will review is the Property Details report. This report will provide you with all the necessary information public record information you will need when preparing for your listing appointment. The information in this report includes the number of bedrooms and bathrooms, MLS data, Owner information, location, current and historical tax data, features and characteristics of the property, and a variety of additional information that is key to being an expert on the property. This report can be printed and emailed to your customer if requested.

FL 34714-4986, Lake County

APN 22-24-26-1508-000-53500

CLIP 8566796988

Print

Email

Customize View

BACK

PROPERTY DETAILS

COMPARABLES

MARKET TRENDS

NEIGHBORS

NEIGHBORHOOD PROFILE

FLOOD MAP

HAZARDS & RISKS



MLS Beds: 5, Type: SFR

MLS Full Baths: 4

Half Baths: 1

MLS Sale Price: \$250,000

MLS Sale Date: 06/07/2018

MLS Sq Ft: 2,220

Lot Sq Ft: 10,405

Yr Built: 2005

Owner Information

Owner

Mailing Label Owner Name

Mailing Address

Mailing City & State

[Redacted]

Mailing Zip

34714

Mailing ZIP + 4

4986

Mailing Carrier Route

R022

Owner Occupied

Yes

The second report we will highlight in this course is the Market Trends report. You can access this report by selecting the Market Trends tab at the top of the reports that are published for your listing. This report provides a variety of data on the local market including the number of closed sales, median sale price, the number of active listings, median days on market, the average sale price per square foot, and the average sale to original sale price ratio. This report is helpful in gaining insight into the surrounding market and will allow you to have productive conversations with your customers during your listing appointments.

Clermont, FL 34714-4986, Lake County

APN 22-24-26-1508-000-53500

CLIP 8566796988

Print

BACK

PROPERTY DETAILS

COMPARABLES

MARKET TRENDS

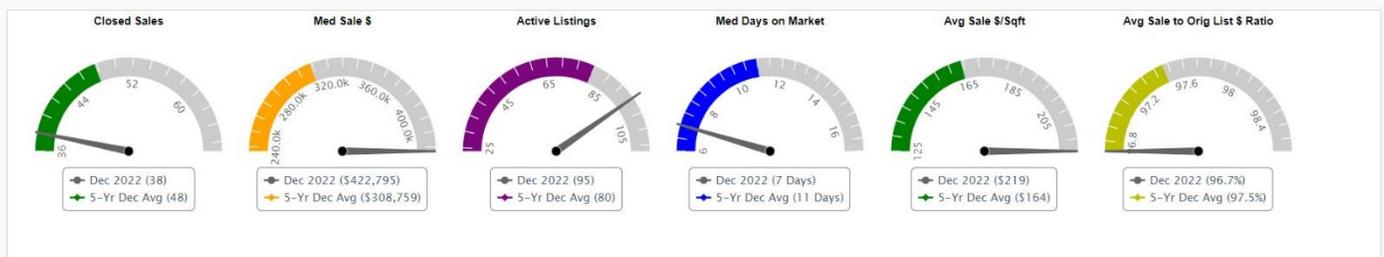
NEIGHBORS

NEIGHBORHOOD PROFILE

FLOOD MAP

HAZARDS & RISKS

Market Overview - 34714, Clermont, FL



## IMapp

IMapp is another great resource to use when preparing for your listing appointment. IMapp produces residential statistics that highlight the benefits of using a professional when selling your home and will illustrate market data that can be useful during these appointments.

To pull up a specific property, you will launch into the IMapp product. Once you are logged into IMapp, the program will open to the search dashboard. There are three tabs across the top left side of the search table. You will want to select the “Tax Search” tab (this is the first tab). From here, you can insert the appropriate search criteria. Below are the specific steps that are taken during the training.

1. You will want to select the appropriate county from which you would like to pull public records. You can do this by using the dropdown menu in the upper right corner of the search form. You will see a dropdown menu next to “Search Area” and select the county in which your property is located.
2. Select Property Street Address under the “Search Field” column using the first dropdown menu. Under the “Search Type” column, select Contains and then type in the street number and street name (do not include Dr. Loop, Circle, etc) into the “Search Value” column.
3. Using the second dropdown menu under the “Search Field” column, select Property Zip Code. Under the “Search Type” column, select Equal to, and then type in the zip code for the property you are looking for into the “Search Value” column.
4. If desired, you can use the third dropdown menu under the “Search Field” column to add Property City, however you should be able to pull up the property using the first two steps outlined above.
5. Once these criteria fields have been completed, you will scroll down towards the bottom of the page and you will see the Start Search button.

The screenshot displays the StellarMLS - IMAPP search interface. At the top, it says "StellarMLS - IMAPP Search Tax Records or MLS Listings" and "logged in as: 035800248". There are three tabs: "Tax Search", "MLS Search", and "Foreclosure Search". The "Tax Search" tab is selected. Below the tabs, there's a "Search County Tax Records" section with a "Search Area" dropdown menu set to "Lake County, FL". The main search area is a table with three columns: "Search Field", "Search Type", and "Search Value". The "Search Field" column has dropdown menus for "Owner Name", "Property Street Address", "Parcel ID #", "Subdivision (input)", "Property Zip Code", "Sale Date", "Sale Price", "Total Area", "Year Built", and "Property Use Code (state)". The "Search Type" column has dropdown menus for "Starts With", "Contains", "Equal To", "Greater Than or Equal To", and "Is One Of". The "Search Value" column has input fields. There are "and" and "or" radio buttons between rows. A "Start Search" button is at the bottom right, highlighted with a yellow arrow. Below the search form is a map of Lake County, FL. At the bottom, there's a "Map Search Area" dropdown menu set to "Complete Map Area", a "Reset To Default Fields" button, and a "Clear All Search Fields" button. A note at the bottom says: "\*Changing the search area may alter existing search criteria. After changing search area, review search criteria before performing a search."

Below is an example of what the search results will look like once the data has been pulled.

**PROPERTY INFORMATION**

PID # 22 24 26 1508 000 53500  
 Property Type: Residential  
 Property Address: [REDACTED]

Property Use:  
 100 / (County)  
 01 / SINGLE FAMILY (state)

Land Use:  
 SINGLE FAMILY (0100)  
 Lot Size: 0.2388 acres / 10,403 sf  
 Waterfront: No  
 Subdivision:  
 ORANGE TREE PHASE 5  
 Subdivision #: 1508  
 Census Tract/Block: 031311 / 3064  
 Twn: 24 / Rng: 26 / Sec: 22  
 Block: 000 / Lot: 53500  
 Neighborhood Code: 0581  
 Latitude: 28.396791  
 Longitude: -81.691288  
 Legal Description:  
 ORANGE TREE PHASE 5 PB 52 PG 91-92 LOT 535 ORB  
 5123 PG 166  
 Plat Book # 52 / Page # 91

**VALUE INFORMATION**

	2018	2019	2020	2021	2022 *
Building Value:	\$181,935	\$181,870	\$191,338	\$210,966	\$157,485
Extra Features:	\$0	\$0	\$0	\$0	\$16,415
Land Value:	\$35,475	\$47,300	\$47,300	\$47,300	\$70,950
Just Market Value:	\$217,410	\$229,170	\$238,638	\$258,266	\$338,820
Percent Change:	- n/a -	5.41%	4.13%	8.23%	31.19%
Total Assessed Value:	\$217,410	\$229,170	\$234,440	\$237,722	\$244,850
Homestead Exemption:	No	Yes	Yes	Yes	Yes
Total Exemptions:	\$3,007	\$25,000	\$25,000	\$25,000	\$50,000
Taxable Value:	\$214,403	\$179,170	\$184,440	\$187,722	\$194,850

Useful information from this view would include home valuation information, Homestead exemptions, historical tax data/history, the zoned schools with links to DOE, Ad Valorem/Non-Ad Valorem taxes, and sales history. From here, to gain access to additional reporting, you will want to select “Residential MLS Stats” from the menu on the upper right-hand side of the page. Once you change to the Residential MLS Stats view, you will want to adjust your timeframe. It will automatically default to the last 24 months; however, you can adjust it to your desired timeframe. You can do this using the Time Period dropdown menu in the bottom right corner of the page.

Underneath the chart/graph that is illustrated in the center of the screen, you will find four different tabs. These tabs represent the various reports that can be pulled from IMap. We recommend using the All Sales report. This report will illustrate MLS Sold Listings vs. Non-MLS sold listings data. This report will outline the importance of using a real estate professional.

**All Sales in Zip Code 34714 Over The Last 24 Months**  
 For Residential Properties Including All Price Ranges

Month	Count	Sold Listings Median Price	Inventory	New vs Sold	All Sales	Non-MLS Sold Properties Count	Non-MLS Sold Properties Median Price
1/2021	42	\$289,084	59	40	326,750	40	\$267,750
2/2021	42	\$312,262	66	17	\$267,600	17	\$267,600
3/2021	72	\$280,000	52	22	\$67,500	22	\$67,500
4/2021	58	\$281,240	47	28	\$62,250	28	\$62,250
5/2021	60	\$291,588	38	42	\$49,000	42	\$49,000
6/2021	56	\$322,752	40	65	\$21,900	65	\$21,900
7/2021	46	\$330,000	34	58	\$37,600	58	\$37,600
8/2021	43	\$342,500	36	44	\$24,700	44	\$24,700
9/2021	47	\$340,740	49	59	\$37,300	59	\$37,300
10/2021	55	\$340,000	46	21	\$52,900	21	\$52,900
11/2021	54	\$350,000	39	15	\$26,000	15	\$26,000
12/2021	61	\$385,000	21	19	\$270,000	19	\$270,000
1/2022	47	\$380,000	58	19	\$110,000	19	\$110,000

To create a CMA in Matrix, be sure to take the Create a Professional CMA using Matrix Class from Stellar MLS.

You will do a residential search and enter the subject property address in the Map Search field and select the status types you want to look for (as seen below)

The screenshot shows the Stellar MLS search interface. At the top, there is a navigation bar with 'StellarMLS', 'MY MATRIX', 'SEARCH', 'STATS', 'TAX', 'LINKS', 'FINANCE', 'ADD/EDIT', and 'MARKET REPORTS'. The user is logged in as 'Working As Rusty Carpenter'. The search bar contains 'Enter Shorthand or MLS#' and 'Recent Searches'. The search criteria are set to 'Criteria', 'Map', and 'Results'. The search filters include:

- Status - Date or Range:** Active (checked), Pending (0-180), Temporarily Off-Market, Canceled (WDN-U), Withdrawn Conditional, Sold (checked), Expired, Leased.
- Contract Status:** Appraisal, Financing, Inspections, Kick Out Clause, Letter Of Intent, And (checked) Or (unchecked) Not.
- Special Sale Provision(s):** Auction.
- Map Search:** No Map Selected. Within 1 miles of My Location.
- State:** Florida.
- County:** Alachua, Baker, Bay, Bradford, Brevard.
- MLS Zip:** 32616 - Alachua, 32615 - Alachua, 32420 - Alford, 32716 - Altamonte Springs, 32715 - Altamonte Springs.
- Price:** (000s).
- Total Bedrooms:**
- Total Bathrooms:**
- # Full Baths:**
- # Half Baths:**
- Sq Ft Heated:**
- Sq M Heated:**
- Year Built:**

At the bottom, there are buttons for 'Clear', '5000+ matches', 'Map', and 'Results'. A green arrow points to the 'Results' button.

View your search results and select the properties you wish to use as comparable properties and choose CMA or Cloud CMA to begin your CMA report (see below).

The screenshot shows the Stellar MLS search results page. The search bar contains 'RES' and 'Include other criteria' is checked. The results are displayed in a table with columns: Distance, #, ML #, Status, Address, City, Zip Code, Subdivision Name, SqFt H, Current Price, BED, FB, HB, Yr Built, Pool, and Pro. The table shows 13 results. At the bottom, there are buttons for 'Actions', 'Refine', 'Save', 'Carts', 'Criteria', 'Email', 'Print', 'CMA', 'Directions', 'Stats', 'Export', 'Quick CMA', 'Cloud CMA', 'ShowingCart', and 'Custom PDF Reports'. Red arrows point to the 'CMA' and 'Cloud CMA' buttons.

Distance	#	ML #	Status	Address	City	Zip Code	Subdivision Name	SqFt H	Current Price	BED	FB	HB	Yr Built	Pool	Pro
0.2 mi	1	06078294	ACT	15702 HERON HILL ST	CLERMONT	34714	ORANGE TREE PH 04 L	2,322	\$525,000	6	3	0	2005	Private	Sin
0.2 mi	2	06099080	ACT	3301 MALLARD HILL ST	CLERMONT	34714	ORANGE TREE PH 04 L	2,324	\$536,900	6	3	0	2005	Private	Sin
0.1 mi	3	06062718	PND	3326 SHRIKE HILL CT	CLERMONT	34714	ORANGE TREE PH 05	2,220	\$500,000	5	3	1	2005	Private	Sin
0.2 mi	4	06053523	SLD	3745 CINNAMON FERN LOOP	CLERMONT	34714	SAVANNAS PH 02C	1,632	\$362,000	3	2	0	2001	Communit	Sin
0.2 mi	5	06046841	SLD	3314 OSPREY HILL ST	CLERMONT	34714	ORANGE TREE PH 04 L	1,791	\$377,200	4	3	0	2004	Private	Sin
0.1 mi	6	06053207	SLD	15810 ROBIN HILL LOOP	CLERMONT	34714	ORANGE TREE PH 06	1,807	\$412,500	4	3	0	2007	Private	Sin
0.0 mi	7	J955006	SLD	16045 BLOSSOM HILL LOOP	CLERMONT	34714	ORANGE TREE PH 05	2,228	\$450,000	5	4	0	2005	Private	Sin
0.0 mi	8	J955009	SLD	16045 BLOSSOM HILL LOOP	CLERMONT	34714	ORANGE TREE PH 05	2,220	\$455,000	5	4	0	2005	Private	Sin
0.2 mi	9	P4921846	SLD	15943 HERON HILL ST	CLERMONT	34714	ORANGE TREE PH 04 L	2,187	\$455,000	5	4	0	2004	Private	Sin
0.1 mi	10	06053866	SLD	15935 ROBIN HILL LOOP	CLERMONT	34714	ORANGE TREE PH 06	2,187	\$470,500	5	4	0	2006	Private	Sin
0.0 mi	11	J950587	SLD	16041 BLOSSOM HILL LOOP	CLERMONT	34714	ORANGE TREE PH 05	2,054	\$485,000	5	3	0	2005	Private	Sin
0.0 mi	12	J953348	SLD	16028 BLOSSOM HILL LOOP	CLERMONT	34714	ORANGE TREE PH 05	2,220	\$550,000	5	4	0	2005	Private	Sin
0.0 mi	13	J953110	SLD	16028 BLOSSOM HILL LOOP	CLERMONT	34714	ORANGE TREE PH 05	2,220	\$550,000	5	4	0	2005	Private	Sin

If you create your CMA using Matrix, your final report will look like below

1 of 4

Rusty Carpenter  
rusty.carpenter@stellaflorids.com  
407-960-5300  
STELLAR MLS  
Make it a Stellar Day!

Subject Property: 3814 Benson Park BOULEVARD, Orlando, 32829 January 17, 2023

### Brief Summary of Compared Properties

A brief summary of comparable properties in this market analysis.

Status: Active

Address	MLS#	Sub Type	SqFt Tot	Beds	Baths	L/S Price	Status Dt	DOM
3814 Benson Park BOULEVARD		SingleFamilyResidence	1,936	4	2/0			
2545 Twilight DRIVE	O6072450	Single Family Residence	2,053	4	2/0	\$440,000	11/15/22	63
9977 Oak Crest ROAD	O6077546	Single Family Residence	2,858	4	2/1	\$490,000	12/12/22	36
10025 Savannah Bluff LANE	O6067188	Single Family Residence	1,972	4	2/0	\$445,000	10/20/22	89
Average			2,284	4	2/0	\$458,333		63

Status: Pending

Address	MLS#	Sub Type	SqFt Tot	Beds	Baths	L/S Price	Status Dt	DOM
3814 Benson Park BOULEVARD		SingleFamilyResidence	1,936	4	2/0			
12026 Philbrook COURT	O6067468	Single Family Residence	1,868	4	2/0	\$469,900	12/14/22	46
Average			1,868	4	2/0	\$469,900		46

Status: Sold

Address	MLS#	Sub Type	SqFt Tot	Beds	Baths	L/S Price	Status Dt	DOM
3814 Benson Park BOULEVARD		SingleFamilyResidence	1,936	4	2/0			
4848 Adair Oak DRIVE	O6066375	Single Family Residence	1,972	4	2/0	\$416,745	1/3/23	40
3730 Andover Cay BOULEVARD	O6069421	Single Family Residence	2,608	4	2/1	\$425,000	1/9/23	14
4887 Adair Oak DRIVE	T3414043	Single Family Residence	2,056	4	2/0	\$429,900	1/3/23	4
12315 Cape Sound COVE	O6062664	Single Family Residence	2,618	4	2/1	\$450,000	12/23/22	41
4981 Waterside Pointe CIRCLE	O6070670	Single Family Residence	1,484	4	2/0	\$385,000	1/13/23	31

If you create your CMA using Cloud CMA, your final report will look like below

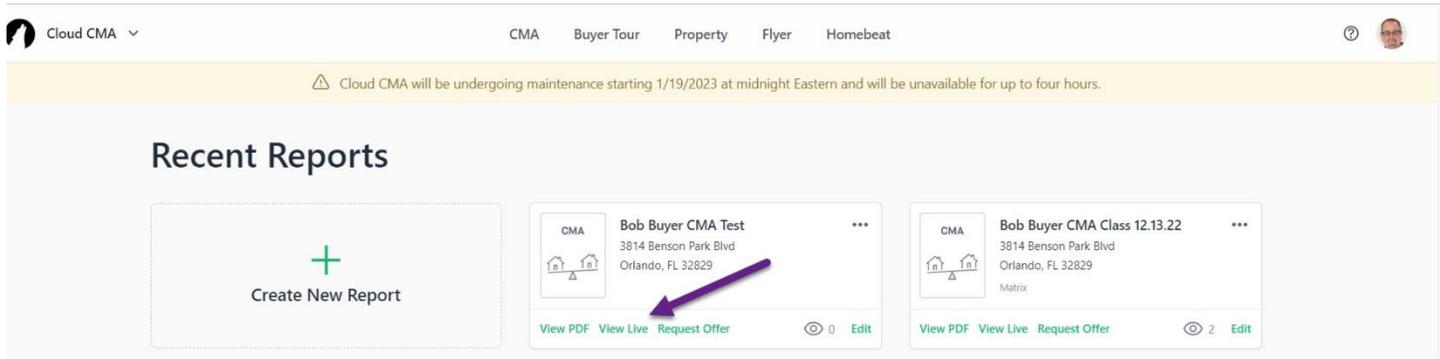
1 of 18

## COMPARATIVE MARKET ANALYSIS

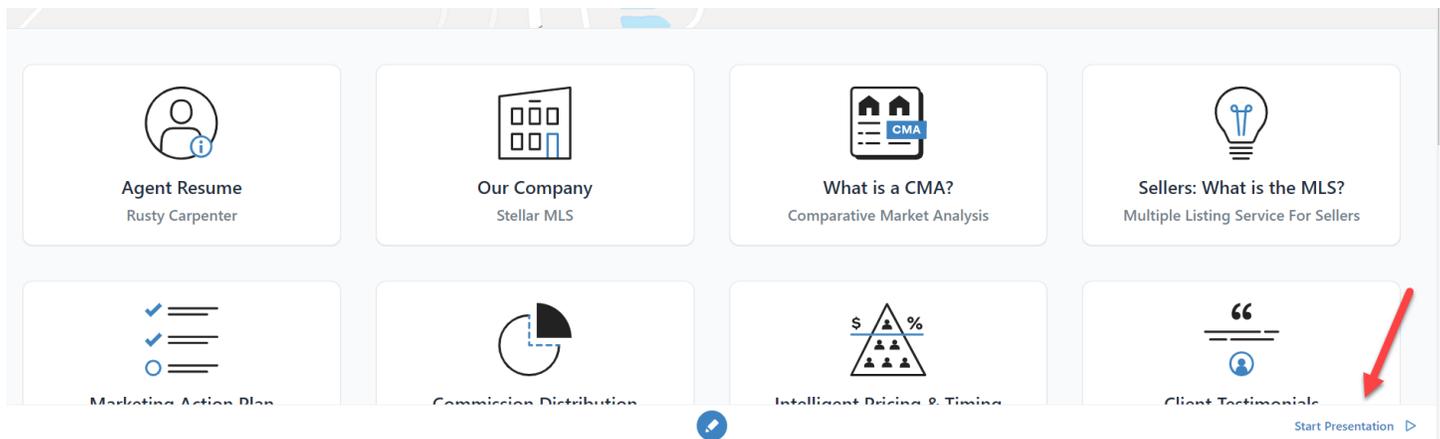


**3814 Benson Park Boulevard, Orlando, Florida  
32829**

If you chose Cloud CMA you can view a PDF version of the report or choose to present it live to your customer by choosing the View Live option (as shown below).



You will select start presentation (as shown below) and it will present in a slide show format.



## Documents:

Have your documents ready and completed with as much information as you can prior to the appointment. Finish completing the needed information with the seller.

- Listing Agreement
- MLS Data Entry Form
- Net Proceeds Sheet
- Any Disclosures or attachments that you will need for the listing
  - (*Sellers Disclosure, HOA/Condo Disclosure, Lead Paint, Surveys, etc.*)

Ensure that all documents have been completed and signed by the seller prior to leaving the appointment.

## Property Photos:

Property photos are a necessity for marketing and one photo is required to activate a listing in the MLS. Whether you take the photos yourself or use a professional photographer, work with the seller and advise of anything that can assist in making the home photo ready. You will need at least one photo (front-facing property with no signage) to activate your listing. You can add your professional photos later if needed.

## **The Listing:**

To enter and activate your listing in the MLS you will need to complete the Adding and Editing Listings course and have the completed and seller-signed MLS data entry form and a minimum of one photo.

- Enter the listing information into the MLS (using the MLS Data entry form)
- Attach one (or more) photos and attachments
- Submit and activate your listing
- You can come back later to edit, add more photos, and attachments if needed
- Use the share link and share your listing to your social media or webpages

***\*A listing appointment preparation checklist is on the next page as a resource***



## LISTING APPOINTMENT PREPARATION CHECKLIST

- **Drive by the property and take a front photo**
  - This can be used to customize the presentation report for your customer
  - It can also be used as the initial photo to enter the listing
  
- **Pull a tax record report on the property address**
  - Verify the ownership
  - Gather tax information and additional property details
  
- **Create your listing presentation**
  - Create a property report presentation using Matrix, Cloud CMA, etc.
  - Proofread and ensure the presentation is customer ready
  
- **Prepare Documents for the appointment**
  - Listing Agreement
  - MLS Data Entry Form
  - Net Proceeds sheet
  - Any disclosures/attachments that may apply
    - *Sellers disclosure, HOA/Condo disclosure, Lead Paint, etc.*
  
- **Have all documents completed and signed by the seller before leaving**
  - Verify if your broker needs to sign any of the documents
  - All signed documents will be required to enter the listing into the MLS
  
- **Take Property Photos (OPTIONAL)**
  - Do a walk-through with the seller and advise of what may help to prepare property for photo readiness.
  - If you are taking photos yourself, ensure the house is photo ready and take the pictures for the listing (use grid lines on your camera if possible to help with alignment)
  - If you are using a photographer, schedule a time that works for the seller and ensure the home is photo ready when the photographer arrives