

Commercial Real Estate Sales Checklist

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Prospecting & Lead Generation

Activities related to finding and qualifying potential commercial real estate clients.

Number of Cold Calls Made

Number of Networking Events Attended



Primary Lead Source

- Online Advertising
- Referrals
- Networking
- Cold Calling
- Social Media

Notes on Recent Prospecting Efforts

Write something...

Target Property Types (for prospecting)

- Office
- Retail
- Industrial
- Multi-Family
- Land

Date of Last Networking Event

Enter date...

Key Contacts Added (LinkedIn/Email)

Write something...

Initial Consultation & Needs Assessment

Gathering information from potential clients and understanding their objectives.

Client's Business Overview (Industry, Size, Current Status)

Write something...

Client's Real Estate Goals (Short-Term & Long-Term)

Write something...

Approximate Budget Range

Enter a number...

Preferred Property Type (Office, Retail, Industrial, Multi-Family, Land)

- Office
- Retail
- Industrial
- Multi-Family
- Land
- Mixed Use
- Other

Desired Location Attributes (Select all that apply)

- Proximity to Major Highways
- Visibility
- Strong Demographics
- Growing Area
- Downtown/Urban Core
- Suburban

Target Acquisition Timeline

Enter date...

Client Role (Buyer, Seller, Investor)

- Buyer
- Seller
- Investor

Any Specific Concerns or Questions?

Write something...

Property Search & Analysis

Identifying and evaluating suitable commercial properties for clients.

Property Size (SF)

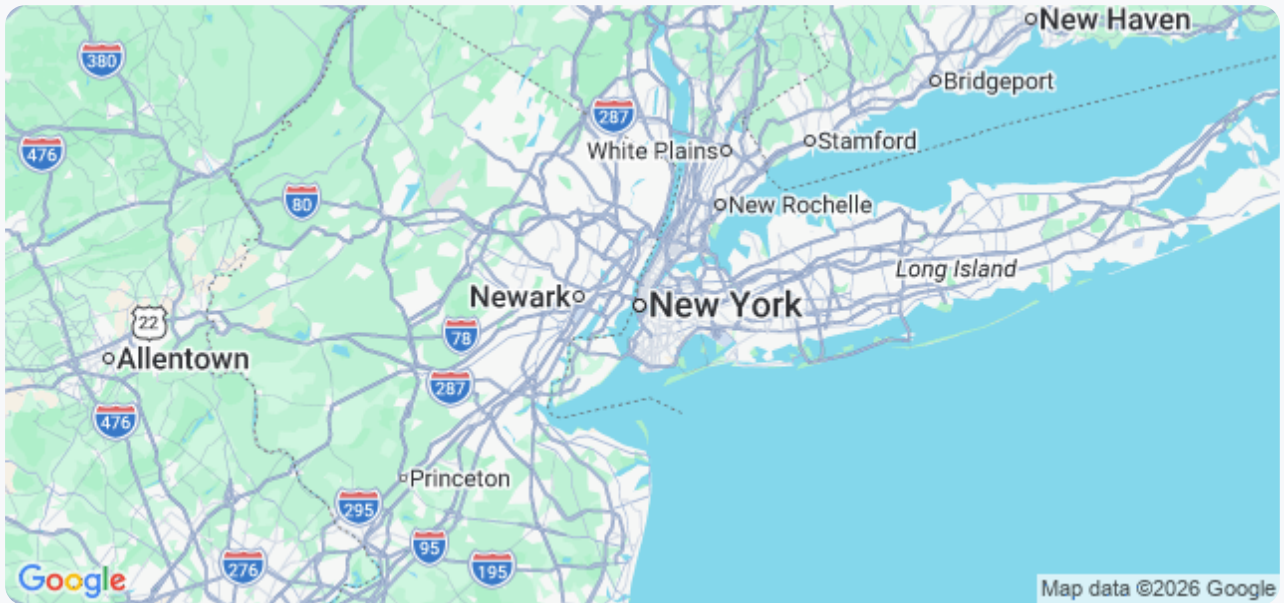
Enter a number...

Asking Price

Enter a number...

Property Address

 [Set My Current Location](#)



Property Type

- Office
- Retail
- Industrial
- Multi-Family
- Land

Detailed Property Description

Write something...

Key Features

- Loading Dock
- High Ceilings
- Ample Parking
- Tenant Mix
- Proximity to Highways
- Visibility

Cap Rate

Enter a number...

Year Built

Enter date...

Property Map

 Upload File

Marketing & Property Promotion

Strategies for advertising and showcasing properties to potential buyers.


Property Description for Marketing Materials

Write something...

Marketing Channels Used (Select all that apply)

- Online Listings (LoopNet, CoStar, etc.)
- Social Media (LinkedIn, Facebook, etc.)
- Email Marketing
- Print Advertising
- Direct Mail
- Broker Networks

Professional Property Photos

 Upload File

Property Brochure (PDF)

 Upload File

Number of Property Views (Online)

Enter a number...

Target Audience Profile (brief summary)

- Small Business Owner
- Investment Group
- National Retail Chain
- Local Restaurant Group

Date of Last Marketing Campaign Launch

Enter date...

Negotiation & Offer Management

Managing offers, counteroffers, and contract negotiations.

Initial Offer Price

Enter a number...

Buyer's Offer Rationale (Justification)

Write something...

Seller's Counter Offer Price

Enter a number...

Seller's Counter Offer Rationale

Write something...

Contingency Types (Buyer)

- Financing
- Inspection
- Environmental
- Appraisal
- Sale of Buyer's Property

Expiration Date of Offer

Enter date...

Earnest Money Deposit Amount Type

- Percentage of Purchase Price
- Fixed Amount
- Other

Notes on Negotiation Strategy

Write something...

Due Diligence & Inspections

Overseeing and coordinating necessary property inspections and due diligence.

Inspection Report Deadline

Enter date...

Phase 1 Environmental Site Assessment (ESA) Report

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Summary of Inspection Findings (Initial Review)

Write something...

Inspections Completed (Select all that apply)

- Building Structure
- Roof
- Electrical
- HVAC
- Environmental
- ADA Compliance
- Property Survey
- Other (Specify in Long Text)

Additional Inspection Notes/Observations

Write something...

Estimated Cost of Identified Repairs (Based on Inspections)

Inspection Resolution Status

- Resolved
- Negotiating with Seller
- Outstanding Concerns - Further Review Needed

Property Survey Documents

 Upload File

Contract & Closing

Finalizing the sales agreement and managing the closing process.

Contract Execution Date

Buyer's Legal Name

Seller's Legal Name

Write something...

Purchase Price

Enter a number...

Closing Date

Enter date...

Contingencies (if any)

Write something...

Fully Executed Contract (PDF)

 Upload File

Title Company

Company A

Company B

Company C

Broker Signature (Buyer)

Post-Sale & Client Follow-Up

Activities after the sale to maintain client relationships and generate referrals.

Closing Date

Enter date...

Post-Sale Debrief Notes (Client)

Write something...

Referral Fee Paid (if applicable)

Enter a number...

Client Satisfaction Survey Sent?

Yes

No

Follow-Up Call/Meeting Scheduled

Enter date...

Feedback Received (if applicable)

Write something...

Thank You Note Sent?

Yes

No

Notes on potential repeat business or referrals

Write something...

Legal & Compliance

Ensuring adherence to all relevant laws and regulations.

License Verification Status

Active

Inactive

Pending

Suspended

License Expiration Date

Enter date...

Continuing Education Credits Completed

Enter a number...

Fair Housing Training Completion?

- Yes
- No
- Pending

Last Fair Housing Training Date

Enter date...

Review of Agency Agreements

Write something...

Proof of E&O Insurance

 Upload File

Compliance with Antitrust Laws?

- Yes, Reviewed
- No, Requires Review
- N/A

Administrative & Documentation

Managing paperwork, record-keeping, and other administrative tasks.

Client Name

Write something...

Property Address

Write something...

Sale Price

Enter a number...

Contract Execution Date

Enter date...

Closing Date

Enter date...

Copy of Sales Agreement

 Upload File

Notes Regarding Contract Details

Write something...

Escrow Company

- Company A
- Company B
- Company C
- Other

Escrow Contact Name

Write something...