A FREE GUIDE FROM ANGELA PORRELLI

4 Checklists That Get Your Evenings Back

THE LISTING SIDE

For busy, established agents who run the whole business from memory: the listing-side systems behind my full real estate business, with evenings off.



I used to lie awake at 2 a.m. wondering if I'd booked the inspection.

Now a checklist remembers for me, and it has for years.

Here are all four of them, the main points, the way I run them today.

By Angela Porrelli

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THE LIST ACADEMY
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Why I Stopped Trusting My Memory



For years, my whole business lived in my head.

I came into real estate as a young mom who wanted extra income without missing school drop-offs. I was good with clients. I was terrible at remembering everything around them. The deposit. The sign order. The condition date. The seller I meant to call on Monday. I'd be at my daughter's game, half there, running a list in my head. And every January I started from zero.

What changed wasn't working harder. I wrote my first real business plan, followed it exactly, and had the best year of my career. That year taught me the business grows when you step into the CEO seat and build things that run on repeat.

So I built them. One board for every deal. A checklist for every stage. Emails that go out on the right day without me. A calendar that keeps past clients close for life. And a simple rule that tells my admin exactly what's theirs.

By the last page you'll have all four, the main points, the way they run in my business today. You can copy them tonight.

> "The business grows when you step into the CEO seat and build things that run on repeat.

HOW TO USE THIS

- Read it once, start to finish, so you see how the four checklists hand off to each other.
- Then build Checklist 1 first. Don't touch the others until your board is running.

The Whole System On One Page

Here's everything, in the order you build it. Screenshot this page. It's the map for the rest of the guide.

- [ ] **Checklist 1, the pipeline:**
  one board, one list per stage, one card per client, a checklist for every stage.
  BUILD TIME: ONE EVENING.
- [ ] **Checklist 2, the follow-up:**
  the emails and updates every seller gets at every stage, written once, sent on the right day.
  BUILD TIME: ONE AFTERNOON A WEEK FOR A MONTH.
- [ ] **Checklist 3, the client touches:**
  what goes into your CRM the day a deal closes, so past clients hear from you for life.
  BUILD TIME: ONE SITTING.
- [ ] **Checklist 4, the hand-off:**
  every item labelled with who does it, so an admin can run the board without you.
  BUILD TIME: ONE HOUR ONCE THE BOARD EXISTS.

THE STAGES I RUN, LEFT TO RIGHT:



This guide covers your listings. Buyers run on their own board, with their own stages and checklists. That's the next guide.

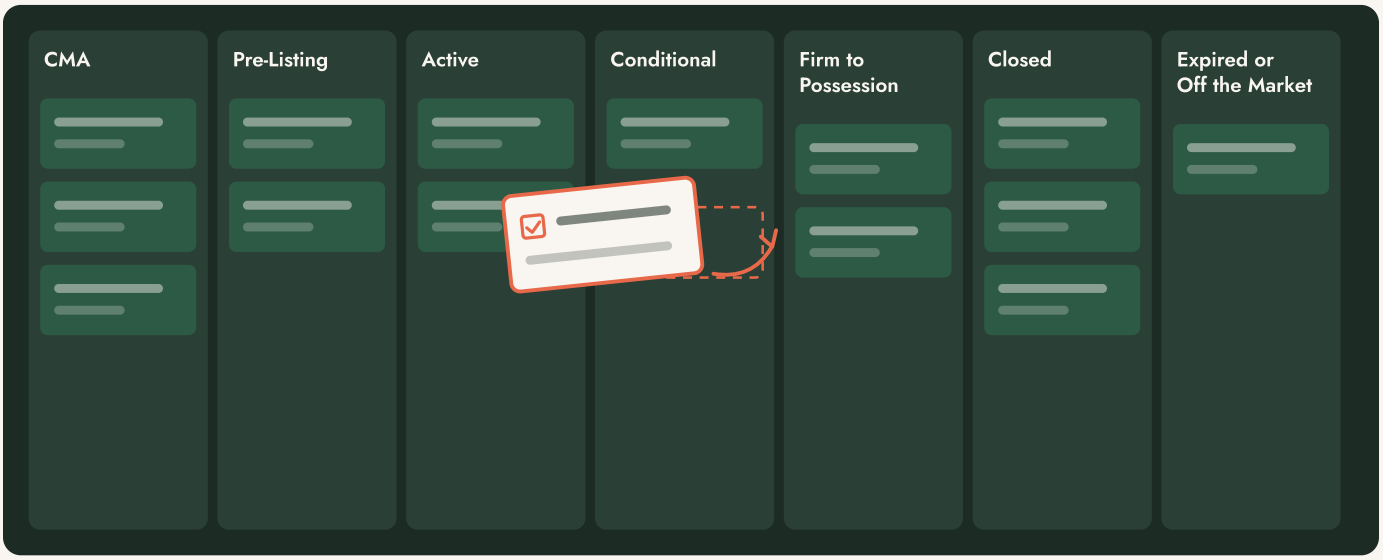
The order matters. Follow-up only works once the board tells you where every client is. Client touches only work once closing has a checklist. And you can't hand off what isn't written down.

Most agents try to fix follow-up first because that's what they feel guilty about. Start with the board. Follow-up gets easy once you can see every deal in one place.

NEXT STEP Open Trello, or any board tool you like, and make one new board called Listing Transactions.

Checklist 1: The Pipeline Board

The goal: every deal you have, on one screen, with the next task already written.



Here's how my board works:

1. Make one list for each stage: CMA, Pre-Listing, Active, Conditional, Firm to Possession, Closed, Expired or Off the Market.
2. Make one template card. It holds every stage's checklist, start to finish. Mine has seven checklists on one card.
3. When a new seller comes in, copy the template card into the CMA list and rename it with the street address and the owner's name.
4. As the deal moves, drag the card to the next list and work that stage's checklist.
5. Add the key dates right on the card: the condition removal date and the closing date. Take the condition date off once it's firm.

The other half of the board is your Drive. Every stage on the board has a matching folder, so every file has one home.

BOARD LIST	DRIVE FOLDER THE CLIENT'S FOLDER LIVES IN
CMA	CMA: every evaluation you do
Pre-Listing	Pre-Listing: confirmed listings being prepped
Active	Listings: Active
Conditional	Listings: Conditionally Sold
Firm to Possession	Listings: Firm to Possession
Closed	Closed, by year, then Listings
Expired or Off the Market	No Listing: Cancelled

When a card moves, the folder moves. That one habit means you can find any document in seconds, and so can your admin.

> **The mistake most agents make:** building a board with stages but no checklists. A board without checklists is just a prettier to-do list. The checklist is what takes the job out of your head.

> "When a card moves, the folder moves.

NEXT STEP Build the seven lists and the matching Drive folders tonight. It takes about an hour.

Why This Lives On Its Own Board, Not In Your CRM

You might be thinking, "My CRM already has a transaction checklist." Mine did too. I tried them. The built-in ones never fit, because every agent runs their business differently.

The bigger problem is what happens when things change. Switch brokerages, switch CRMs, or have your CRM change its format, and everything you built inside it is gone.

Some were written for a different market, even a different country. They used different words, asked for steps my market doesn't need, and put things in the wrong order. And when I tried to customize them, it got so complicated that everything felt jumbled.

So I built my own board, outside my CRM and outside my brokerage. Trello, Notion, Monday: use whichever one you'll actually open every day. Your CRM still does what it's good at: contacts, tags, birthdays and sequences. The process lives on the board.

YOUR CRM

holds your people.

YOUR BOARD

holds your process.

Build it once, on a board you own, and it comes with you wherever you go. No one can take that from you.

> **The mistake most agents make:** building your whole process inside a system someone else controls.

NEXT STEP Pick your board tool tonight: the one you'll open every day.

The Stage Checklists: CMA To Active

These come from my real template card, with my own tools named so you can swap in yours.

These are the main points from my template card, the frame to build on. Break each one into the steps your business needs. The course walks through the full step-by-step for every item. Once you have an admin, label each item Admin or Agent on your own card. That's what makes Checklist 4 possible.

CMA

- [ ] CMA: every evaluation starts here. Set up the lead in the CRM, tag it with the CMA date and newsletter, and create the client's folder: address, owner name, date.
- [ ] CMA: in your MLS system, make a cart named for the address, client and date. Add the comparables you'll use and save them as a PDF in the CMA folder.
- [ ] CMA: pull the past listing, the property tax info, the city assessment, past permits, and the basic title and parcel map, and save each to the folder.

PRE-LISTING

- [ ] Pre-listing: pull the full title and set up the transaction with every seller as a separate contact.
- [ ] Pre-listing: prepare the listing contract, send the FINTRAC ID verification request for every seller, and order the sign once the go-live day is confirmed.
- [ ] Pre-listing: book the staging consult and photos, and post Coming Soon.

ACTIVE

- [ ] Active: push the listing to MLS 24 to 48 hours ahead and save it as incomplete. Check every field against the signed docs. Upload photos, remarks and the virtual tour, then activate on list day.
- [ ] Active: on day one, send the seller the "Listing is live" email with the listing link and the signed docs merged into one PDF.
- [ ] Active: set up the weekly neighbourhood auto-email and the weekly online listing report for the seller.
- [ ] Active: post Just Listed, add the listing to your Google Business Profile, and enter the seller's birthday and spouse's name in the CRM.

In Saskatchewan the title pulls come from ISC and the assessment comes from the city's site. Your province or state will have its own. The same goes for ID: FINTRAC is Canada's required identity check; in the US, follow your brokerage's ID rules. Write the exact website into the item so nobody has to go looking.

> **The mistake most agents make:** writing items like "do paperwork." If an item can't be done by someone who's never met you, it isn't finished.

NEXT STEP Copy these items into your template card and swap in your own tools and websites.

The Stage Checklists: Conditional To Closed

This is where deals slip. It's also where my 2 a.m. panic used to live, so these lists are the longest.

CONDITIONAL

- [ ] Conditional: update the CRM status, change MLS to conditional, and move the Drive folder.
- [ ] Conditional: send the seller the "After Accepted Offer" email with the removal and closing dates edited to match the contract.
- [ ] Conditional: put the condition removal date in both the agent's and the admin's calendar.
- [ ] Conditional: send the home inspection checklist. For condos, order the Schedule C and the estoppel (in the US, the HOA resale documents and estoppel letter), and send the estoppel to the buyer's agent the day it arrives.
- [ ] Conditional: pause the neighbourhood auto-email. Pause it, don't delete it.

FIRM TO POSSESSION

- [ ] Firm to Possession: complete the notice of sale, mark the listing sold, move the folder, and order the Sold sign and the sign down.
- [ ] Firm to Possession: send the "Firm to Possession" email. Check every counter and amendment for a changed closing date first.
- [ ] Firm to Possession: send the cleaning move-out checklist three weeks before closing and the closing day tips one week before.

CLOSED

- [ ] Closed: enter the closing date in the CRM, tag the year, take the listing off Google and social, and move the folder to Closed.

Then there's the branch nobody plans for: conditions not satisfied. My card has its own five items for it. Take the conditional message off MLS. Upload the notice. Rename the accepted offer file to "Failed Offer." Move the folder back to Active. Switch the CRM tag back to active.

> "Pause the auto-email. Don't delete it. A failed deal goes back to Active in five steps, not five phone calls.

19
MAIN POINTS IN THIS GUIDE

131
ITEMS ON MY REAL TEMPLATE CARD

What you have here is the frame: 19 main points across the stages. My real template card has 131 items, and every one starts with who does it. It took us a long time to learn how small each step had to be before my admin could run it without asking me, and before I could see at a glance where every deal stood. That level of detail is what the course builds with you, stage by stage. The last page tells you how to get it.

NEXT STEP Add the conditions-not-satisfied branch to your Conditional checklist today, before you need it.

Checklist 2: Follow-Up That Goes Out On Time

The goal: every seller hears from you at every stage, on the right day, without you having to remember.

The trick is that each email is written once, saved as a template, and tied to a checklist item. The board tells you when. The template means it takes two minutes.

WHEN	WHAT THE SELLER GETS	WHO SENDS IT
Listing goes live	"Listing is live" email with the link and all signed docs in one PDF	Admin
Every week while active	A neighbourhood report of new, sold and expired listings, sent automatically one morning a week	Automatic
Every week while active	A short check-in from me with what happened that week: showings, feedback, what's next	Agent
Offer accepted	"After Accepted Offer" email with the removal and closing dates	Admin
Offer accepted	The home inspection checklist	Admin
Firm	"Firm to Possession" email with the closing date and inclusions checked against the contract	Admin
Three weeks out	The cleaning move-out checklist	Admin
One week out	Closing day tips	Admin

My weekly check-in is a short video. Sellers can see my face and hear what's happening, and nobody plays phone tag.

MY MONDAY UPDATE

A

Hi, it's Angela with your Monday update. This week you had _____ showings. Here's the feedback that came in: _____. Here's what I'm watching in the neighbourhood: _____. Here's what's next this week: _____. If anything's on your mind, text me and I'll call you back today.

The weekly touch stays with the agent. Everything else on this page can be sent by an admin from a template.

> **The mistake most agents make:** following up only when there's news. Sellers get nervous in the quiet weeks. That's when the weekly update matters most.

Inside the full course: every email template word for word, the automations that send them on the right day, my Monday video setup, and more.

NEXT STEP Write the "Listing is live" email first. It's the one every seller gets, and it sets the tone for the whole listing.

Checklist 3: Clients For Life

The goal: past clients hear from you all year without you having to remember a single date.

This checklist runs the day a deal goes firm and the day it closes. Ten minutes of entry then sets up years of touches.

WHILE ACTIVE

- [ ] While active: check name spellings against the ID verification. Add the birthday month and year, turn on the birthday email or text, and tag the birthday month.
- [ ] While active: add the spouse's first and last name to the same profile.

AT FIRM

- [ ] At firm: send a small thank-you gift. Mine is a roll of packing tape with this note: "Here is a little something to help wrap up the deal! Thank you for the privilege of working with you."
- [ ] At firm: offer to send pizza on moving day. Send the email, wait for the reply, then order and send the receipt.
- [ ] At firm: ask for a Google review.

AT CLOSING

- [ ] At closing: fill in the property address, keep the mailing address current, and fill in the closing date in the field your CRM uses to start its closing and anniversary touches. Every CRM handles this differently. Getting the right field to fire the right sequence, like my review request, is one of the triggers the course walks you through setting up.
- [ ] At closing: tag the year, then tag the client A or B. A means a repeat client or someone who sends referrals.
- [ ] At closing: add the household to your master client list and the birthday sheet.

From there, the year is already planned: birthday cards, closing anniversaries, review requests, value touches and holiday mailouts. Some of it runs on its own. The rest is personal, not just tech touches, and it's built once so it goes out every year with very little of my time. This is where your clients-for-life system starts. That's its own guide.

> "Ten minutes at closing sets up years of touches.

The mistake most agents make: relying on memory or social media to stay in touch. If the birthday isn't in the CRM with the reminder on, it won't happen in a busy month.

NEXT STEP Pull your last ten closings and check that each one has a birthday, a closing date and an A or B tag.

Checklist 4: The Hand-Off

EVERYTHING ON THIS CARD CAN LEAVE YOUR DESK.

The goal isn't a tidier to-do list. It's a business that runs on a day you're not there. Almost every item on your template card can go to an admin: some on day one, some once they're trained, and a few depend on your local rules.

1 ADMIN FROM DAY ONE, PURE PROCESS:

title pulls, transaction setup, MLS upload and checks, sign orders, every templated email, Drive moves, CRM updates, social posts and closing paperwork.

2 ADMIN ONCE TRAINED OR APPROVED, YOUR CALL:

- [ ] Remarks. I write mine with AI, guided by my own walkthrough, the story I want the home to tell and the search terms I want it found for. An admin who has seen the house and knows your direction can do the same.
- [ ] Google review requests. Mine run as a semi-automated AI task. Automate it and nobody has to remember.
- [ ] Checking on condition removal. Admin can. I keep it, for the reason below.
- [ ] Paying the estoppel or HOA documents. Admin can, if you're comfortable giving them card or banking access.
- [ ] Lockbox on and off. Only if your admin is licensed, works in your city, and your local rules allow it.

3 WHAT I KEEP ON PURPOSE, THE RELATIONSHIPS:

the weekly update with every seller.

The calls with the other agent on conditions, negotiations and troubleshooting. Those relationships pay off on the next deal. And anything that needs your licence and judgement: pricing advice, negotiation strategy and contract guidance.

Every item above is something I've handed off or could. That's the freedom: you keep the conversations, your admin runs the process.

(What an unlicensed assistant can do varies by province, state and brokerage. Check yours before you hand off anything that touches the public, money, or property access.)

When I hired admin, I trained them on this card and nothing else. They had a list of exactly what was theirs, in order, with the website written in. That's why I tell agents to hire sooner than feels comfortable. The checklist does most of the training.

If you're not ready to hire, the split still helps. Do the admin items in one block, two mornings a week, instead of scattering them through your day.

> **The mistake most agents make:** hiring admin before anything is written down, then spending months explaining. Write the checklist first, then hire.

NEXT STEP Plug In, Clock Out shows you how to find, hire and train your admin on this exact card, so the checklist does the training for you.

Your First 30 Days

Here's how to put all four in without the business slowing down. One system at a time.

WEEK	WHAT YOU DO	DONE WHEN
1	Build the board and the matching Drive folders. Copy every active deal onto it.	Every active deal is on the board.
2	Build your template card with the stage checklists. Attach it to every active deal.	Every deal has its checklist.
3	Write your three most-used seller emails as templates: Listing is live, After Accepted Offer, Firm to Possession.	The next seller at each stage gets a template, not a fresh email.
4	Run the client-touch checklist on your last ten closings, and label every item Admin or Agent.	Ten past clients are fully set up, and the card is ready to hand off.

Keep a note on your phone all month called "Still in my head." Every time you catch yourself remembering something at night, write it down. In the morning, turn it into a checklist item. By the end of the month that note will be short.

> "Every time you catch yourself remembering something at night, it becomes a checklist item in the morning.

NEXT STEP Put a one-hour block in your calendar this week called "Build the board."

What To Do Next

You now have the whole system. Here it is in five lines.

- [x] One board, seven stages, one card per client.
- [ ] One template card with a checklist for every stage, every item starting with who does it.
- [ ] One template email for every stage, plus a weekly update to every seller.
- [ ] Ten minutes of CRM entry at firm and at closing, so past clients hear from you for life.
- [ ] Admin items handed off, or done in two blocks a week.

NEXT STEP Build the board this week. Just the board. Leave the rest until every active deal is on it.

Coming next: the buyer side. Same four systems, on your buyer board, from first showing to keys.

WHEN YOU'RE READY This is the framework. The gold is in the detail: breaking every point down until someone who has never met your client can do it, and nothing gets missed. That's the work the course walks you through. The last page tells you how to get it.

THE LAST PAGE

How Angela Helps Next



You have the four checklists I run my real estate business on. That's real, and you can start tonight.

What a guide can't do is sit beside you while you build it, or answer the question you hit at step three.

It's free to every agent at LPT Realty. Not at LPT? You can buy it on its own. And everything else LPT Realty provides, I walk you through on a call.

That's what Plug In, Clock Out is for. It's a course plus a community. There are recorded walkthroughs for each system, my listing board and my buyer board with every stage checklist, the Drive folder map and email templates handed over in full, a client-for-life calendar, and how to find, hire and train an admin on your own card. Once a month we get on a group call for questions. Over 90 days you plug in one system at a time, and you own every piece of it, wherever you go.

You have the listing side. The buyer side is the other half, and the course covers both. Build it in the quiet months, before spring listings hit.

> "Gail, a senior agent on my team, plugged into these systems and enjoys her job again. She takes more time off than ever.

If this added value and you want full access to everything I've built, book a partnership call with me at calendly.com/angela-porrelli/partnership-call. We'll talk about your business and whether it's a fit. If it isn't, that's okay.

Book a call with me **calendly.com/angela-porrelli/partnership-call**

4 CHECKLISTS THAT GET YOUR EVENINGS BACK

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