LISTING-SIDE COORDINATION / 01

MAP MILESTONES AND RESPONSIBLE ROLES

Use neutral labels only. Do not record names, addresses, contract dates, account or wire details, credentials or document contents.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Property A / transaction label / no address

Seller A objectives / requested coordination boundary

Milestone A / status label / responsible role

Milestone B / status label / responsible role

Broker, agent, settlement, lender or legal role map

Seller action, approval or private meeting / owner role

Preparation only. Not brokerage, agency, contract, disclosure, title, escrow, settlement, lending, tax, wire, privacy or legal advice. Keep identities, addresses, dates, account details, instructions and documents out.

LISTING-SIDE COORDINATION / 02

DEFINE DOCUMENT AND COMMUNICATION HANDOFFS

Ask the provider to document administrative ownership, secure routing and escalation without interpreting transaction requirements.

Document category / requester / receiving role / status only

Missing-item follow-up / owner / escalation role

Source-of-truth system or channel / authorized roles

Changed-instruction verification / trusted-contact route

Open-item or exception log / responsible professional

Closing status / final records / transition handoff

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LISTING-SIDE COORDINATION / 03

CHECK PROPOSAL READINESS

Tick what is organized. These checks do not set a deadline, approve a disclosure, interpret a document or authorize funds.

- [ ] Every provider receives the same non-sensitive workflow brief
- [ ] Private identities, dates, documents and payment details stay outside
- [ ] Milestones are labels, not legal or contractual interpretations
- [ ] Administrative tasks and licensed decisions are separated
- [ ] Document-request and secure-routing roles are visible
- [ ] The source-of-truth channel is identified
- [ ] Changed instructions and exceptions have trusted-contact handoffs
- [ ] Closing status and final records handoff are defined

Open milestone, role or scope-boundary question

Unassigned document request, follow-up or escalation

Missing channel, verification, closing or records-handoff detail

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LISTING-SIDE COORDINATION / 04

QUESTIONS FOR THE TRANSACTION COORDINATOR

Record the answer and where it appears in the proposal or supporting documents.

Scope: which listing-side milestones are included or shared?

Roles: how are administrative and licensed decisions separated?

Documents: how are requests, status and secure routing recorded?

Channels: what is the source of truth, and how are changes verified?

Exceptions: how are open items escalated to the responsible professional?

Handoff: what closing status, records and transition work is included?

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LISTING-SIDE COORDINATION / 05

COMPARE THE SAME WORKFLOW BRIEF

Use Provider A and B. Clarify unlike task, role or communication assumptions before comparing proposals.

Provider A / B / proposal dates / shared workflow brief

Milestones, administrative scope and role boundaries - A / B

Document requests, channels, verification and escalation - A / B

Closing status, records handoff, retention boundary and exclusions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Transaction Coordination request. Share a non-sensitive listing-side workflow brief so participating pros can compete with proposals. Compare milestone scope, role boundaries, document-request workflow, communication, escalation, records handoff, exclusions and fit. A private transaction, document and responsible-professional review may be needed before a final proposal.

One request. Every pro's best offer.

Start a request

Participation varies. A private transaction, document and responsible-professional review may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/transaction-coordination/listing-side-coordination

Consumer Financial Protection Bureau: Closing on your new home (official reference)

Consumer Financial Protection Bureau: Mortgage closing scams (official reference)

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