TRANSACTION COORDINATION / 01

DEFINE THE TRANSACTION WORKFLOW

Give every coordinator the same stage, participant, and operating starting point.

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

Transaction type, current stage, general property context, client role, and existing coordination arrangement

Agent, broker, lender, title or settlement, attorney, inspector, vendor, client, and other participant roles

Known milestones exactly as supplied, source contact for each date, current status, and unresolved items

Systems, shared folders, email channels, transaction platforms, calendars, and existing templates in use

Client and professional communication preferences, update recipients, meeting rhythm, and escalation contacts

My three priorities for the first coordination conversation

Preparation only. Not real-estate, brokerage, lending, title, escrow, settlement, tax, compliance, cybersecurity, contract, or legal advice. Keep private records off this worksheet.

TRANSACTION COORDINATION / 02

MAP TASKS, OWNERS, AND BOUNDARIES

Separate coordination work from decisions, explanations, approvals, and professional judgment.

Communication, scheduling, status tracking, reminder, meeting, and participant-follow-up tasks

Document-request, signature-routing, receipt-tracking, checklist, file-naming, and version-control tasks

Inspection, appraisal, lender, title or settlement, attorney, vendor, access, and closing coordination tasks

Client, agent, broker, lender, settlement, attorney, vendor, and coordinator responsibilities

Decisions, advice, approvals, explanations, negotiations, deadlines, and compliance work excluded from coordination

Deliverables, reports, audit trail, final file, handoff, record return, and closeout expectations

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TRANSACTION COORDINATION / 03

PREPARE ACCESS, COVERAGE, AND ESCALATION

Tick what is ready. Keep private records out of this public worksheet and use the provider's secure process.

- [ ] Transaction stage and participant roles are listed
- [ ] Known milestones are tied to their source contacts
- [ ] Requested tasks and excluded professional decisions are separated
- [ ] Communication recipients and escalation contacts are identified
- [ ] System and secure document-transfer questions are prepared
- [ ] Primary and backup coverage expectations are listed
- [ ] Closeout, record return, and handoff questions are ready
- [ ] Every provider will receive the same workflow brief

System access, least-needed permissions, authentication, secure transfer, redacted working copy, retention, return, and deletion questions

Primary coordinator, backup coverage, hours, response expectations, absence plan, volume assumptions, and handoff contacts

Missing item, conflicting instruction, changed date, urgent issue, stalled response, exception, and unresolved-item escalation process

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TRANSACTION COORDINATION / 04

QUESTIONS FOR THE COORDINATOR

Record how this provider would receive instructions, track work, communicate, escalate, and close out.

Scope: how are transaction stage, participants, requested tasks, decision boundaries, deliverables, and exclusions documented?

Workflow: how are source dates, requests, signatures, receipts, versions, status, reminders, and handoffs tracked?

Boundaries: how are questions requiring explanation, judgment, negotiation, approval, deadline interpretation, or advice referred?

Security: what access, authentication, secure transfer, redaction, permissions, retention, return, and deletion practices apply?

Coverage: who is primary and backup, what hours and response expectations apply, and how are urgent or unresolved items escalated?

Proposal: what fee structure, volume assumptions, onboarding, client and professional tasks, terms, final file, and closeout apply?

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TRANSACTION COORDINATION / 05

COMPARE THE SAME COORDINATION SCOPE

Use A and B in every box. Clarify differences before comparing totals or fit.

Provider A / Provider B / workflow conversation and proposal dates

Transaction stage, communications, scheduling, document requests, tracking, vendors, and closeout - A / B

Team, coverage, systems, access, security, reporting, escalation, boundaries, and deliverables - A / B

Responsibilities, exclusions, complete fee structure, volume assumptions, terms, handoff, and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai and start a Transaction Coordination request. Share the transaction stage, participant roles, existing workflow, requested coordination tasks, communication preferences, system-access questions, coverage needs, and handoff expectations so participating pros can compete with proposals. Compare written scope, responsibilities, complete fee structure, terms, and fit.

One request. Every pro's best offer.

Start a request

Participation varies. A private workflow, access, and transaction-stage review may be needed before a final proposal.

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

Consumer Financial Protection Bureau: Your home loan toolkit (official reference)

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

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