The 15 Contract-to-Close Tasks
You Should Never Do Manually Again

A checklist for realtors who want their weekends back

FACT: The average agent spends 30 hours on admin for every 10 hours actually selling.

DEADLINE & COMPLIANCE

[X] Contingency Deadline Tracking
Auto-reminders to all parties 72/48/24 hrs before each deadline
Inspection, appraisal, financing, and title contingencies all tracked automatically.

[X] Inspection Period Reminders
Automated nudges for scheduling within the contractual window
Sends reminders to buyer, inspector, and listing agent with available time slots.

[X] Financing Milestone Alerts
Loan application, appraisal order, underwriting, and clear-to-close checkpoints
Keeps the lender accountable and clients informed at every stage.

Time saved: 4+ hours per transaction
Pro tip: Missing a single contingency deadline can kill a deal or cost your client thousands.

DOCUMENT COLLECTION

[X] Signature Request Sequences
Auto-send, auto-remind, and auto-escalate until signed
No more calling to ask "did you sign yet?" - the system handles the follow-up.

[X] Document Checklist Requests
Itemized requests with real-time completion tracking
Clients see exactly what they still owe; you see who is holding things up.

[X] Disclosure Delivery & Acknowledgment
Timestamped proof of delivery and receipt confirmation
CYA documentation that protects you if questions arise later.

Time saved: 5+ hours per transaction
Pro tip: 73% of closing delays are caused by missing or incomplete documentation.

CLIENT COMMUNICATION

[X] Weekly Status Updates
Scheduled summaries so clients never have to ask "what's happening?"
Automated emails/texts every Monday with transaction progress and next steps.

[X] Milestone Notifications
Instant alerts when key events complete
Appraisal received, loan approved, clear to close - clients know immediately.

[X] Multi-Party Coordination
Keep lender, title company, and attorneys aligned automatically
Everyone gets the updates they need without you playing telephone.

Time saved: 3+ hours per transaction
Pro tip: Proactive communication is the #1 driver of 5-star reviews and referrals.

CLOSING COORDINATION

[X] **Final Walkthrough Scheduling**
Auto-propose times based on availability, confirm, and remind
Coordinates between buyer, seller, and listing agent schedules automatically.

[X] **Closing Appointment Coordination**
Sync all parties to title company availability
Mobile notary, remote signing, or in-person - scheduled without the back-and-forth.

[X] **Closing Day Prep Messages**
What to bring, where to go, what to expect
Reduces "where do I go?" calls on closing day to zero.

Time saved: 2+ hours per transaction
Pro tip: A smooth closing is the last impression your client remembers.

POST-CLOSE FOLLOW-UP

[X] **Review Request Sequences**
Perfectly timed asks for Google, Zillow, and Realtor.com reviews
Sent 3-7 days after closing when satisfaction is highest. Includes direct links.

[X] **Referral Nurture Sequences**
Stay top-of-mind without manual follow-up
30/60/90 day check-ins, market updates, and "know anyone?" touches.

[X] **Anniversary & Check-in Automations**
Home-iversary messages, market valuations, and seasonal tips
Turns one transaction into a lifetime relationship and repeat business.

Time saved: 2+ hours per transaction
Pro tip: It costs 5x more to acquire a new client than to get a referral from an existing one.

THE MATH

If you close 25 transactions per year and save 16 hours on each one, that's 400 hours back.

At a conservative $150/hour value of your time, that's $60,000 in recovered productivity - time you could spend prospecting for new listings, being present with your family, or simply not working every weekend.

The agents who automate these tasks don't just save time. They close more deals because they have the capacity to take on more clients without dropping balls.

TOTAL TIME SAVED: 16+ HOURS PER TRANSACTION

Ready to stop babysitting closings?

Reply to this message for a free 15-minute strategy call. We'll map out exactly which of these 15 tasks are eating your time and show you how to put them on autopilot.

No pitch. No pressure. Just a plan.

WHAT YOU'LL WALK AWAY WITH:

> A clear picture of which tasks are draining your time
> A prioritized list of what to automate first for maximum ROI
> Specific tools and templates you can implement immediately
> A realistic timeline to get your transaction workflow on autopilot

Your time is worth more than paperwork.