

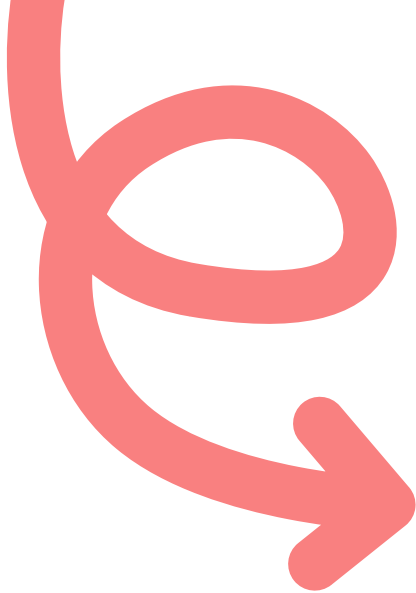


# Vendor experience audit checklist

A 50-point checklist for agents

[www.rexsoftware.co.uk](http://www.rexsoftware.co.uk)





This is your ultimate self-audit to uncover every crack in your vendor experience before it costs you instructions. Use it to find the weak spots that make your vendors question your value and fix them as you go.

## What the checklist covers

- How vendors find you
- How they research you
- How they experience your listing presentation
- How they feel during marketing, viewings and negotiation
- How they feel after the sale.

## Using the checklist

### Frequency

Run the audit quarterly or after every major campaign cycle.

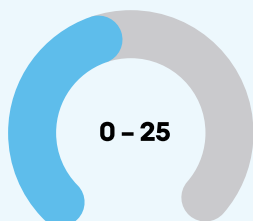
### Who

The checklist can be used by individual agents, entire teams or sales leaders to assess performance consistency.

### How

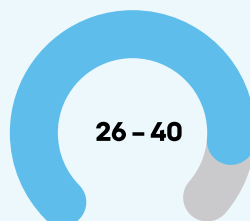
Check off each item as you go. Once finished, tally up the checked items and compare them against the scoring system below.

## Scoring system



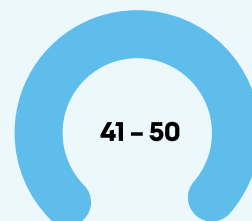
**0 - 25**

You're losing instructions. Fix what you can today.



**26 - 40**

Solid foundation, but you're leaving trust and repeat business on the table.



**41 - 50**

You're a vendor magnet. Keep sharpening.

# Checklist

AUDIT DATE

AUDITED BY

PREVIOUS SCORE

/ 50

☐

1 – 10

## First impressions

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- ☐ Your online profiles present a trustworthy, expert image.
- ☐ Online reviews consistently reflect your competence as an agent.
- ☐ Social media posts are professional and relevant to your work.
- ☐ Community group mentions paints a positive local reputation.
- ☐ Website is user-friendly, with clear selling information, testimonials, and no broken links.
- ☐ Voicemail greeting is clear, concise and upbeat.
- ☐ You respond to enquiries within an hour on business days.
- ☐ Office staff are friendly and helpful to visitors (or callers).
- ☐ Email updates are informative, relevant, and not perceived as spam.

☐

11 – 20

## Level of service

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- ☐ Valuation booking process is smooth and simple.
- ☐ You are punctual, and your presentation is sharp.
- ☐ Marketing collateral is polished, valuable and best in class.
- ☐ Sales strategy is explained in clear language free of jargons.
- ☐ Recent comparable sales are prepared and relevant.
- ☐ Commission and marketing are communicated as value-driven investments.
- ☐ You prioritise active listening over excessive selling.
- ☐ Vendor concerns are addressed before they arise.
- ☐ Pitch is tailored to each vendor. No generic script.





21 – 30

### Marketing and open homes



- ☐ Property photography is bright, professional and realistic.
- ☐ Property description is engaging, concise and error-free.
- ☐ Listings are updated promptly across all portals.
- ☐ Vendors receive proactive updates throughout the campaign.
- ☐ Buyer feedback is gathered consistently and shared promptly.
- ☐ Availability is maintained and responsive during the campaign.
- ☐ Extras like staging advice are routinely offered.
- ☐ Every lead is followed up with persistence and care.
- ☐ Negative feedback is addressed with practical solutions.
- ☐ Property viewing times are scheduled with vendor's convenience in mind.



31 – 40

### Negotiation and sale



- ☐ Expectations are framed realistically from the start.
- ☐ Offers are communicated clearly, without delay.
- ☐ Negotiations focus on achieving the best possible price.
- ☐ Conditions, inspections, and paperwork are handled efficiently.
- ☐ Vendor privacy is respected and protected at all stages.
- ☐ Next steps are clearly outlined using plain language.
- ☐ Calm, confident demeanour is maintained under pressure.
- ☐ Difficult buyers are managed promptly but with respect.
- ☐ Vendor feels supported and in control throughout the process.
- ☐ Daily updates are provided until the sale is finalised.







41 – 50

### After the sale

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- ☐ Vendors are thanked with a handwritten note or thoughtful gift.
- ☐ Moving checklists are provided to assist with relocation.
- ☐ Contact is maintained post-settlement to ensure satisfaction.
- ☐ Review requests are made at the optimal moment.
- ☐ Vendors details in the database are up-to-date.
- ☐ Invitations to local market updates are extended.
- ☐ Anniversaries are acknowledged with a check-in.
- ☐ Referral requests are made with confidence.
- ☐ Referred contacts are followed up with priority and care.

## Need help improving your vendor experience?

Missed updates, slow approvals, unclear results... it adds up fast. But it doesn't have to be that way.

If you're ready to tidy things up and make your vendor process work better for everyone, we're here to help. Our team can walk you through what great looks like, spot what's not working, and show you how Rex can fix it.

Just send us a message on [rexsoftware.co.uk/contact](https://www.rexsoftware.co.uk/contact) and we'll take it from there.