



Agent: _____ Version: _____ Date: _____

1 • VENDOR ROSTER

Every referral you've ever collected, finally in one place. A backup for each service is the part almost nobody has — until the primary is booked.

SERVICE	PRIMARY VENDOR	BACKUP	CONTACT	PACKAGE / PRICE	DOESN'T DO / GAPS	REFERRED BY
Photography						
Aerial / Drone						
Video						
Staging						
Cleaning						
Pre-Inspection						
Sign Install						
Measure / Floor Plan						

If it's in your head, you can't hand it off — you can only be interrupted about it. Every box in this SOP is a question your assistant would otherwise have to ask you.



2 · REPAIR BENCH

The moment you're texting the group chat for an HVAC guy is the moment you're inside a 3-day objection deadline — the worst possible time to be sourcing a vendor.

TRADE	CONTRACTOR	CONTACT	REFERRED BY	USED BEFORE?	SAME-WEEK?
HVAC				Y · N	Y · N
Plumbing				Y · N	Y · N
Electrical				Y · N	Y · N
Roofing				Y · N	Y · N
Windows / Siding				Y · N	Y · N
Concrete				Y · N	Y · N
Landscaping				Y · N	Y · N
Sprinkler				Y · N	Y · N
				Y · N	Y · N
				Y · N	Y · N
				Y · N	Y · N

A gap on this page is a decision, not a failure. If your photographer doesn't fly a drone, you either book a second vendor (and schedule twice) — or accept it. Deciding now beats discovering it on launch day.

Template name: _____ (e.g., Standard · Luxury · Condo)

I use this template when: _____

This is version # _____ **completed on:** _____ (update both every time you change a row)

The rule doesn't need to be scientific — it needs to be pre-decided. One judgment call ("which template?") replaces fifteen.

3 · TRIGGER MAP

One row per service. Order matters — repairs → clean → stage → photos — so a delay upstream moves every row below it. The last rows fire at the end of the listing.

SERVICE / VENDOR	FIRES ON (STATUS CHANGE)	ORDER BY (LEAD TIME)	WHO ORDERS	WHO PAYS	CLIENT INFO TO VENDOR?	PROPERTY ACCESS?	CLIENT TOLD HOW?
				me · team · client split ____%	Y · N	Y · N	invite · text · —
				me · team · client split ____%	Y · N	Y · N	invite · text · —
				me · team · client split ____%	Y · N	Y · N	invite · text · —
				me · team · client split ____%	Y · N	Y · N	invite · text · —
				me · team · client split ____%	Y · N	Y · N	invite · text · —
				me · team · client split ____%	Y · N	Y · N	invite · text · —
Sign removal	Closed			me · team · client split ____%	Y · N	Y · N	invite · text · —
Lockbox pickup	Closed			me · team · client split ____%	Y · N	Y · N	invite · text · —

Status anchors: Signed → Photo-Ready → Coming Soon → Active → Under Contract → Closed | Client told how: invite = calendar invite

4 · ACCESS PROTOCOL

The code changes every listing. The process shouldn't.

Where does access info live for each listing (lockbox, alarm, gate, pets, homeowner contact, occupied/vacant)?

How does a vendor get it — and how do you know they need it *before* the driveway call?

If you had to revoke access today, how would you? Who has the code right now?

Fill in the version number and date above — version 1 is supposed to be wrong somewhere. When a launch goes sideways, the fix isn't a mental note — it's an edit to this page and a new version number. And the vacation test: a listing agreement gets signed while you're at Disney. Can someone else run this page without calling you?