ESTATE AGENCY LAUNCH PROGRAMME · ONBOARD THE INSTRUCTION BEFORE YOU MARKET

Signed-to-live onboarding checklist

The order to work a new instruction in, from AML to portal, so nothing compliant gets skipped.

01 Verify who you are acting for

AML customer due diligence comes first. This is a signpost, not legal advice: do it, and get it right.

- [ ] Verify the seller or landlord's identity before you do anything else.
- [ ] Confirm they are legally entitled to sell or let the property.
- [ ] Record the checks and keep the evidence on file.
- [ ] Do not market the property until the AML checks are cleared.

02 Capture the material information

Parts A, B and C from Module 3, gathered before listing. This is a signpost, not legal advice.

- [ ] Collect the Part A basics: price, tenure, council tax band.
- [ ] Collect the Part B details: utilities, broadband, and parking.
- [ ] Collect the Part C details: flood risk, restrictions, and anything that could affect a decision to buy.
- [ ] Fill the gaps before the property goes live, not after.

03 Produce the marketing assets

Order these once the property is verified and the information is in.

- [ ] Book the photography, floorplan and EPC (Module 9).
- [ ] Confirm the marketing price and strategy with the client in writing.
- [ ] Draft the listing copy from the material information you captured.

04 Log it and go live

The property should be fully worked up before it appears anywhere.

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- [ ] Log the instruction, contacts and key dates in your CRM.
- [ ] Check the agreement is signed and the fee terms are recorded.
- [ ] Push to the portals only once everything above is done.

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