**Quick Consultation Checklist**

**Before the consultation, confirm you have the following:**

* Client Pre-Appointment Order Form – Screen for “red-flags”
* Client Internet Research - Real estate agent research, home photos, printed listing and buyer demographic notes (Consultation Research Sheet)
* Call/Email/Text to reconfirm appointment and address
* Additional Interview Questions
* Arrive early and drive the neighborhood, pulling any additional home-for-sale flyers
* Portfolio - Business cards, testimonials, sell sheets, iPad, photos and proposal forms
* Staging Day Contract, photo releases
* Client feedback/referral form and Recommended Vendor list if the agent does not have one
* Staging Report, HSR Action Plan or General Action Plan to guide you and fill out front page
* Staging Toolbox - measuring tape, drill, picture hanging supplies, paint chips, etc. Refer to the *Guide to Successful Consultations* for full list of tool box necessities.
* Transform-a-Room Toolbox - Have an idea what room to transform ahead of time
* Cleaning supplies – Just to have handy, you’re not going to spend your time cleaning!
* Digital camera, iPad
* Map out your process, have the materials handy, and mentally go over it.

**In Conclusion:**

* Do a final review of the Staging Report and hand them your shopping list
* Use the GeniusScan app to video the completed report to pdf. Get final payment
* Ask client if they feel confident moving forward. Do they need you to come back? Power Shopping?
* Consult your calendar for a day to complete the staging process if additional styling is needed. Assume the client will want this automatically for best photos. Get deposit
* Ask to take photos now for further study in preparation for the Staging Day
* Schedule day to follow up with client on calendar.
* Send "Thank You" card to home seller *and* real estate agent.
* Send Staging Thank You Follow Up Email to upsell your Redesign Services