Remote Listing Checklist

Win a business listing you never visit: first call, documents, video walk-through, verification and signing.

FREE CHECKLIST

1. First-call questions

- [ ] Why are you thinking of selling, and why now?
- [ ] What's your ideal timeline?
- [ ] What do you hope to walk away with?
- [ ] Who else is involved in the decision?
- [ ] Do you own the business and the real estate, or lease?
- [ ] How involved are you day to day?
- [ ] Have you tried to sell before? What happened?
- [ ] How did you hear about us?

2. Documents to request first

- [ ] 3 years of business tax returns
- [ ] Year-to-date profit and loss statement
- [ ] Current lease (and landlord contact)
- [ ] List of equipment and inventory
- [ ] Business licenses and permits
- [ ] Employee list and roles (no names needed yet)
- [ ] Formation documents / proof of ownership
- [ ] Debts and liens on the business

3. Video walk-through

- [ ] Exterior, signage and parking
- [ ] Front of house / customer areas
- [ ] Equipment: condition and age
- [ ] Back office, storage, inventory
- [ ] Staff on duty (with owner's OK)
- [ ] Anything the owner says needs repair

> *"Honestly, the owner does not care where you are. He or she just wants a buyer." Josh Factor*

4. Verify, sign and launch

- [ ] Ownership verified (state records, lease, licenses)
- [ ] Engagement agreement signed by owner of record
- [ ] Documents uploaded to the CRM data room
- [ ] Listing created; buyers' market identified
- [ ] Owner added to updates / drip schedule
- [ ] Local licensing rules checked

> *"Signed him over the phone. Sold it to a guy five minutes away." Lou Brill*

5. Calling a for-sale-by-owner (FSBO) seller

Opener: "Hi, this is [name] with [firm]. I saw your [business] is for sale. I help owners in [area] sell businesses like yours. Do you have a few minutes to tell me how it's going?"

If they say they're handling it themselves: "That makes sense. Many owners start that way. If it would help, I can share how we screen buyers with NDAs and proof of funds, so you only spend time with serious ones."

Voicemail: "Hi, it's [name] with [firm], calling about the [business] you have for sale. I work with buyers looking for businesses like yours. Call me back at [number] when it's convenient."

Check broker licensing rules before taking a listing in another state. Full article: "Casting a Wider Net as a Business Broker" at businessbrokerscrm.com.