

The Real Estate Progress Report

A conversation about how we're doing—while we're still working together.

Why have a Progress Report?

Buying or selling a home can take weeks or months. During that time, communication, expectations, goals and circumstances can change. Rather than waiting until the transaction is finished to discuss your experience, this Progress Report creates an opportunity to stop, talk and make adjustments while there is still time to do so.

This is not a report card. There is no required score. It is a conversation between you and your real estate professional about what is working, what could work better, and whether anything has changed.

A simple process

1. START	2. CHECK IN	3. DISCUSS	4. ADJUST	5. CONTINUE
Establish goals and expectations	Pause at key points	What is working? What isn't?	Make changes when appropriate	Keep moving forward

Important: This Progress Report is intended to facilitate communication. It is not a contract, representation agreement, amendment, disclosure, or modification of any existing agreement. Required transaction documents and written instructions should be handled separately as appropriate.

Client / Household: _____

Date: _____ Progress Report #: _____

Transaction: ☐ Buying ☐ Selling

Progress Report — Core Check-In

Use this section at any point during the transaction when it is helpful to pause and talk.

Communication: Are you getting the amount and type of communication you need?	
Understanding: Do you understand where we are in the process and what happens next?	
Guidance: Am I providing the information and explanations you need to make your own decisions?	
Expectations: Is the process generally unfolding as you expected?	
Concerns: Is there anything you're concerned about that we have not discussed?	
Service: Is there anything you would like me to do differently?	
Relationship: Are you comfortable with the way we are working together?	

What is working particularly well?

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What could work better?

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Is there anything you have not told me because you weren't sure how to bring it up?

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Buyer Progress Report

Questions to consider as your home search and purchase progress.

Goals: Are we still looking for the right type of home, in the right location and price range?	
Priorities: Have you learned anything from the homes we've seen that changes your priorities?	
Financing: Has anything changed regarding your financing, budget or comfort with the monthly payment?	
Search strategy: Are we seeing enough of the right properties to make informed decisions?	
Decision-making: Do you feel you have enough information to decide when a property is right—or not right—for you?	
Offers: When considering an offer, do you understand the important terms, risks and alternatives?	
Due diligence: Do you understand what is happening with inspections, appraisal, financing, title and other contingencies?	
Changes: Has anything changed about your timing or desire to purchase?	

Buyer notes / decisions for our next step:

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Next steps we agreed to discuss or complete:

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Seller Progress Report

Questions to consider as your home is prepared, marketed and negotiated.

Goals: Are your reasons for selling and your desired timing still the same?	
Pricing: Does the available market information support the pricing strategy we are using?	
Marketing: Are you comfortable with how the property is being presented and marketed?	
Showing activity: Are the number and quality of showings giving us useful information?	
Feedback: Are you receiving and understanding the feedback that may help us evaluate our strategy?	
Offers: If an offer is received, do you understand the price, terms, contingencies and alternatives?	
Negotiation: Do you feel you have the information you need before making decisions?	
Changes: Has anything changed about your timing, financial goals or desire to sell?	

Seller notes / decisions for our next step:

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Next steps we agreed to discuss or complete:

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Before We Finish

One final opportunity to reflect—before the transaction becomes a memory.

The purpose of this final conversation is not simply to ask whether you were satisfied. It is an opportunity to look back at the process and identify anything that could have been handled differently, while the experience is still fresh.

Did you feel informed throughout the transaction?	
Did you understand the important decisions and why they were being discussed?	
Did you feel comfortable asking questions or disagreeing with my recommendations?	
Was there anything you wish you had known earlier?	
Was there anything I could have handled differently?	
What was most helpful to you?	
Is there anything you would want another buyer or seller to know before starting a transaction?	

Anything else you'd like to discuss:

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The goal isn't perfection. It's communication.

If something isn't working, I want the opportunity to know about it while we're still working together.

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