

Seller: Settlement Complete - Workflow

This automation is created to congratulate the seller with the sale of their home, send the tax invoice and nurture the relationship via yearly anniversary-reminders.

Both the **Seller** and **Buyer Settlement Complete** automations are important sequences as they will keep your agency in the seller/buyer's mind.

Immediately



Task for consultant

Task for consultant to congratulate the seller on settlement within 24 hours



Task for admin

Task for admin to send settlement tax invoice to the seller within 24 hours

2 days later



Email to seller

Subject: Thank you for choosing us

Message: Hi [contact_firstname],

Once again I would like to congratulate you on the sale of your property. We hope everything has been going smoothly for you and that the sale of your home has been an enjoyable experience.

I also just wanted to take the time to thank you for choosing us to help sell your home. As a token of our appreciation, we would like to offer you our ongoing support - please do not hesitate to give us a call or get in touch if you ever need anything or have any questions.

If you have any feedback on our role in the sale of your property, we would love to hear from you. I have inserted a section below for you to provide you feedback or a testimonial for our services.

Feedback/Testimonial

[insert feedback here/insert link for review]

Once again, we wish you good luck and thank you for choosing us! I hope to hear from you soon.

[agent_signature]

1 year later



Email to seller

Subject: Happy anniversary!

Message: Hi [contact_firstname],

Happy anniversary!

Time flies - it's been one year already since you sold your property with [agency_name]. We hope you enjoyed the experience with us and that you've had a prosperous and positive year.

If you ever need an agent again to assist you, a friend or family member with the sale or purchase of a property, please do not hesitate to get in touch with me. I would love to help out.

I will give you a call soon to see if there are any issues or if there is anything I could help you with, but please feel free to get in touch with me sooner should you have any immediate needs.

[agent_signature]



Task for consultant

Task for consultant to give seller a 1-year anniversary call within 24 hours

Every year later



Email to seller

Subject: Happy anniversary!

Message: Hi [contact_firstname],

Happy anniversary!

Time flies - it's been another year already since you sold your property with [agency_name]. We hope you've had a prosperous and positive year.

If you ever need an agent again to assist you, a friend or family member with the sale or purchase of a property, please do not hesitate to get in touch with me. I would love to help out.

I will follow up with a call soon to see if there is anything I could help you with, but please do not hesitate to get in touch with me sooner should you have any immediate needs.

[agent_signature]



Task for consultant

Task for consultant to give seller a 1-year anniversary call within 24 hours