

INTRODUCTION

Your TLC should make your life easier. Not harder.

Updated for 2026 — now covering both Transaction and Listing Coordination (TLC).

If you're an agent who works with a transaction coordinator, listing coordinator, or both — whether in-house, independent, or brokerage-provided — this audit will tell you in under five minutes whether you're getting what you're paying for.

A good coordinator should absorb the administrative load of every file: tracking deadlines, managing documents, coordinating with lenders, title, inspectors, photographers, vendors, and brokers, and delivering both clean listings and pre-audited contract files. The best ones do it so quietly that you forget they exist — until you realize you haven't thought about a deadline (or a sign install) in weeks.

A mediocre coordinator creates the illusion of help while leaving you to catch what falls through the cracks. Missing signatures. Late amendments. Lender silence that nobody flagged. Wire fraud warnings that never went out. MLS listings published without broker approval. Listing copy edited by someone who isn't licensed. You close anyway — and the cost of their failure shows up as the extra hours you worked, or worse, as liability on your next E&O claim or NCREC inquiry.

This audit is built from the actual workflow of a high-performing residential coordinator in North Carolina. Each of the 31 questions reflects a concrete standard of care. Score yours honestly.

How to use this:

For each question, check YES, NO, or UNSURE. If you're checking "Unsure" on something your coordinator is supposed to handle, that alone is a data point. You shouldn't have to wonder.

Categories 1–6 (Q1–21) cover Transaction Coordination — score every coordinator against these. Category 7 (Q22–31) covers Listing Coordination — score these only if your coordinator handles listing-launch work. Listing-only or contract-only work earns its own sub score (see scoring page).

THE 31-POINT TLC (Transaction Listing Coordinator) AUDIT

31 questions across 7 categories. Check each one honestly.

CATEGORY 1 • 3 QUESTIONS Onboarding & Setup		
01	<p>Did your TLC review and sign a Master Service Agreement before your first file?</p> <p><i>No MSA = no defined scope, no defined fee, no accountability. The signed agreement is non-negotiable.</i></p>	<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?
02	<p>Did they collect your communication preferences and brokerage-specific rules during onboarding?</p> <p><i>A TLC who doesn't ask about your preferences will work the way THEY work, not the way YOU work. That's a future-conflict guarantee.</i></p>	<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?
03	<p>Can they show you a documented SOP and sample file?</p> <p><i>"I just know how to do it" is the wrong answer. Great TLCs follow the same process every time. If they can't show you the process, they're improvising on your files.</i></p>	<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?

CATEGORY 2 • 4 QUESTIONS Communication		
04	<p>Do you get a weekly status update without having to ask for one?</p> <p><i>You should never have to chase your TLC for a status. They should chase you with the update.</i></p>	<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?
05	<p>Do they introduce themselves to the other agent, lender, and title/escrow within 48 hours of contract?</p> <p><i>Delayed introductions delay everything downstream. 48 hours is the standard.</i></p>	<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?
06	<p>Is there a defined response time for emails and texts during business hours?</p> <p><i>"I'll get back to you when I can" is not a response time. Same-business-day is the standard.</i></p>	<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?
07	<p>Do they log all material communication in your file record?</p> <p><i>If a dispute surfaces months later, an undocumented file is your problem to defend. Logging is non-optional.</i></p>	<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?

Deadline Management

<p>08</p>	<p>Do they use a multi-touch reminder system for every key date? <i>A single reminder isn't enough. The standard is 7 days out, 3 days out, 1 day out, and same-day. Nothing should slip.</i></p>	<p><input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?</p>
<p>09</p>	<p>Do they calendar every critical deadline the same day the contract is executed? <i>Due diligence, earnest money, financing, inspection, appraisal, closing — all should be calendared within 24 hours.</i></p>	<p><input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?</p>
<p>10</p>	<p>Do they verify each deadline against the contract using a two-pass review? <i>Single-entry deadlines get typo-corrupted regularly. Two-pass means entered, then re-verified at a separate sitting.</i></p>	<p><input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?</p>
<p>11</p>	<p>Do they escalate at-risk deadlines to you immediately rather than quietly extending? <i>A TLC who silently rolls deadlines is hiding problems. You want one who flags every at-risk date the moment it's at risk.</i></p>	<p><input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?</p>

CATEGORY 4 • 4 QUESTIONS

Compliance & Risk

12	<p>Do they deliver wire fraud warnings at three separate touchpoints? <i>At contract, one week before close, and 24 hours before wire. One warning isn't enough anymore.</i></p>	<p><input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?</p>
13	<p>Do they stay strictly within admin-only boundaries — no legal, pricing, or negotiation advice to clients? <i>A TLC who offers opinions on these is creating liability for your license. Clear boundaries protect everyone.</i></p>	<p><input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?</p>
14	<p>Do they verify every required disclosure is signed before the appropriate deadline? <i>Missing disclosures are the most common broker compliance finding. A good TLC caTLChes every one.</i></p>	<p><input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?</p>
15	<p>Do they deliver a broker-compliance-ready file without you having to prep it? <i>Your broker's audit should be a non-event. If you're scrambling before reviews, your TLC is the problem.</i></p>	<p><input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?</p>

CATEGORY 5 • 4 QUESTIONS

Closing Coordination

16	<p>Do they run a formal pre-close audit in the final 72 hours? <i>Every document verified, every signature confirmed, every contingency released — before closing day, not at the table.</i></p>	<p><input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?</p>
17	<p>Do they confirm wire instructions by phone to a known number, never just by email? <i>Wire fraud at closing is the #1 financial crime in residential real estate. Email-only confirmation is malpractice.</i></p>	<p><input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?</p>
18	<p>Do they confirm utilities-on for the final walk-through and the appraisal? <i>These routinely slip when the TLC treats closing as the finish line instead of the destination.</i></p>	<p><input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?</p>
19	<p>Do they track the Closing Disclosure delivery deadline (3-day TRID compliance)? <i>A late CD delays the closing. A TLC who doesn't track this is one who hasn't read the rule.</i></p>	<p><input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?</p>

Post-Close

<p>20</p>	<p>Do they archive every file per your brokerage's retention policy? <i>Records disputes surface months or years after close. A complete archive is your insurance.</i></p>	<p><input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?</p>
<p>21</p>	<p>Do they deliver a post-close package to your client — settlement statement, review request, anniversary reminder? <i>Every closed file should produce a review and a referral opportunity. A TLC who doesn't close the loop is leaving money on the table.</i></p>	<p><input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?</p>

Listing Coordination — for listing-side work only

Skip Category 7 if your coordinator only handles contract-to-close TLC. Score it if they handle pre-contract listing-launch work (signed listing agreement → MLS live → accepted offer).

22	<p>Do they refuse to write listing copy, set price, or approve advertising claims? <i>MLS submissions must come only from broker-supplied data. A TLC who edits copy or modifies price is exposing your license to NCREC sanction.</i></p>	<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?
23	<p>Do they capture written broker approval before any MLS submission or change? <i>Every MLS submission and every price/copy change should produce three artifacts on the file: broker-supplied input, written broker approval, and the final published MLS sheet. No exceptions.</i></p>	<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?
24	<p>Do they retrieve HOA, deed, tax, plat, and supporting documents before listing live? <i>Missing supporting documents at listing-live cause delays at offer and closing. The retrieval should happen during launch, not when an offer arrives.</i></p>	<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?
25	<p>Do they coordinate the photographer, sign, lockbox, and showing platform without you having to manage vendors? <i>Vendor coordination is a defining listing-launch task. A listing coordinator who hands the vendor list back to you isn't doing the work.</i></p>	<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?
26	<p>Do they send the seller a welcome message and weekly seller updates without you needing to draft them? <i>Seller communication during the listing period is template-driven, not custom — but it should still happen reliably without your intervention.</i></p>	<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?
27	<p>Do they escalate any seller question about pricing, strategy, or negotiation back to you before replying? <i>Sellers will ask seller-strategy questions. The TLC should never answer them — every pricing/strategy/negotiation question gets escalated back to the agent.</i></p>	<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?
28	<p>Do they confirm "listing live" status to you and the seller with the MLS number on the same day publication completes? <i>Listings going live without same-day notification means showings start before you know the listing is searchable. That's how missed-call leads happen.</i></p>	<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?
29	<p>Do they maintain an offer-receipt log on the active listing? <i>Every offer received should be logged with timestamp, source, and broker notification. This is your audit trail when offers compete or get withdrawn.</i></p>	<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?
30	<p>Do they hand off accepted-offer files cleanly into contract-to-close without re-collecting information? <i>Listing → contract conversion should reuse contact data, MLS file, and supporting documents. A coordinator who restarts intake is wasting your time.</i></p>	<input type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/> ?

31

Do they price listing coordination separately from contract-to-close (or offer a clear bundle)?

Vague "I do listings too" pricing leads to scope creep and disputes. Look for published listing tiers (typically \$165–\$329) plus an explicit bundle path into TLC.

YES NO ?

Now count your YES answers.

Be honest. A question you had to check "Unsure" on is functionally a "No" — if you don't know, your coordinator isn't telling you.

Two scores: TLC core (0–21) and Listing add-on (0–10)

Score them separately. A coordinator can be excellent at TLC and brand-new at Listing Coordination — or vice versa. Don't blend the scores.

Your TLC score (Categories 1–6)

Score	What it means	What to do
18–21	You've got a great TLC.	Keep them. Protect the relationship. Send them referrals. A TLC performing at this level is worth double what they charge.
13–17	Adequate, but you're doing their work.	You're paying for a TLC and still chasing deadlines, prepping your own compliance files, or introducing yourself to the lender. That's unpaid overtime.
0–12	You're paying to create liability.	A TLC scoring this low isn't reducing your risk — they're adding to it. Every missed disclosure, skipped wire warning, and untracked deadline is yours to answer for.

Your Listing Coordination score (Category 7)

Score	What it means	What to do
9–10	You've got a real listing coordinator.	MLS discipline, broker-approval evidence, vendor coordination, and seller-communication boundaries are all in place. This is the standard.
5–8	Going through the motions.	Some of the work is happening, but the discipline isn't. Spot-check the broker-approval evidence on your last three listings and have a direct conversation about gaps.
0–4	This isn't listing coordination.	Vague pricing, no MLS-from-broker-data discipline, no documented seller-communication policy. At best you're getting a virtual assistant. At worst, you're inheriting NCREC exposure on every listing.

What to do next

If your coordinator scored in the green on both, congratulations — don't mess with what's working.

If they scored yellow or red on either, the next step isn't a confrontation. It's a comparison. Before you decide whether to coach them, replace them, or just live with it, find out what the standard actually looks like.

Curious what a top-tier coordinator actually delivers?

Eddie Burroughs is a North Carolina residential transaction & listing coordinator serving agents across the state.

E&O insured. Documented SOPs on every file. 7/3/1 deadline system. NC-specific MLS submission discipline (broker-supplied data only, written broker approval before publication). Three-touchpoint wire fraud protocol. Clear admin-only boundaries. Pre-close audits. Pay-at-closing available.

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252-214-2689

eddie@eddieburroughs.com | eddieburroughs.com

Hiring for the first time? Download our companion guide: "How to Hire a Listing & Transaction Coordinator: The Agent's Complete Guide" at eddieburroughs.com/hiring-guide

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