

# ESTATE SALE PLANNING CHECKLIST



Ready to have an estate sale? It's essential to establish clear goals, realistic timelines, and a practical budget. Taking time upfront to plan thoughtfully will set you up for success and help ensure you make decisions that align with your actual situation and priorities.

## 1/ INITIAL PLANNING & DECISION MAKING

The success of your estate sale depends almost entirely on how effectively you spread the word to your target audience. Without consistent, multi-channel marketing, even the best inventory will sit unsold and expensive items will move at a loss.

### Define Your Goals

Start by identifying whether your priority is generating income, clearing items quickly, or some combination of both. This clarity will influence every subsequent decision about pricing, marketing, and how long you're willing to invest in the process.

CLARIFY YOUR PRIMARY OBJECTIVE (DECLUTTERING, MAKING MONEY, MOVING, DOWNSIZING)

DETERMINE POTENTIAL SALES DATES

REVIEW RESOURCE READINESS (CASH, SUPPORT)

### Budget & Investment

Running a professional estate sale requires upfront spending on materials, marketing, and staffing, all of which directly impact your final profit. Understanding exactly how much you're willing to invest will help you choose the right strategies and set realistic revenue expectations.

DECIDE BUDGET FOR PRICING MATERIALS

ALLOCATE FUNDS FOR STAGING MATERIALS

BUDGET FOR SETUP MATERIALS

PLAN FOR MARKETING AND ADVERTISING EXPENSES

CONSIDER STAFF/LABOR COSTS

## Pre-Sale Preparation

The weeks before your sale are the ideal time to lay groundwork for post-sale tasks, especially contacting charities and junk removal services that book up quickly. Knowing your complete action plan in advance reduces stress and ensures you're not scrambling at the last minute.

- RESEARCH MARKETING PLATFORMS (ESTATE SALES.NET, FACEBOOK, NEXTDOOR, LOCAL SITES)
- UNDERSTAND YOUR TARGET DEMOGRAPHIC
- PLAN POST-SALE DISPOSITION STRATEGY (DONATIONS, JUNK REMOVAL, CLEANING)
- CONTACT CHARITIES OR JUNK REMOVAL COMPANIES IN ADVANCE (ESPECIALLY CRITICAL IF SELLING IN SUMMER—THEY BOOK WEEKS OUT)

## 2/ MARKETING & ADVERTISING

The success of your estate sale depends almost entirely on how effectively you spread the word to your target audience. Without consistent, multi-channel marketing, even the best inventory will sit unsold and expensive items will move at a loss.

### Primary Channels

Each platform reaches different demographics, so using a combination of online and physical advertising maximizes your exposure. Estate Sales.net is industry-standard and should be your primary vehicle, but local platforms and street signage also drive significant foot traffic.

- LIST ON ESTATE SALES.NET (INDUSTRY'S LARGEST ESTATE SALE WEBSITE)
- POST ON FACEBOOK AND FACEBOOK MARKETPLACE
- POST ON NEXTDOOR
- CREATE STREET SIGNS FOR MAIN INTERSECTIONS
- POST LOCALLY RELEVANT LISTINGS

### Marketing Strategy

Knowing who you're selling to helps you craft messaging and choose channels that resonate with potential buyers. A well-targeted campaign with compelling photos and descriptions attracts serious shoppers who are ready to buy.

IDENTIFY AND TARGET YOUR DEMOGRAPHIC

CREATE COMPELLING LISTING DESCRIPTIONS

CONSIDER PROFESSIONAL PHOTOGRAPHY

PLAN ADVERTISING TIMELINE

## Property Preparation

Your home is no longer a private residence during an estate sale—it's a retail storefront where every detail matters. First impressions and smooth traffic flow directly influence how long shoppers stay and how much they spend.

## Mindset Shift

Emotionally detaching from your home allows you to make objective decisions about presentation and staging. Viewing your property through a shopper's eyes helps you identify problems and opportunities you might otherwise miss.

DETACH EMOTIONALLY FROM YOUR HOME AND YOUR THINGS

VIEW YOUR HOUSE AS A RETAIL STORE, NOT A RESIDENCE

THINK LIKE A SHOPPER—CONSIDER FLOW AND EXPERIENCE

## Cleanliness & Presentation

A clean, well-lit property signals quality and respect for your items, encouraging buyers to spend freely. Dust and clutter, by contrast, make shoppers question the condition and value of everything in your home.

DEEP CLEAN ENTIRE PROPERTY

VACUUM ALL CARPETS AND FLOORS

DUST ALL ITEMS AND SURFACES

ENSURE GOOD LIGHTING THROUGHOUT

## Access & Safety

Protecting your property and keeping shoppers safe are legal and ethical responsibilities that also protect your liability. Strategic use of barriers, shoe covers, and access restrictions keeps sensitive areas private while reducing damage and risk.

IDENTIFY MAIN ENTRY POINT FOR SHOPPERS

PLAN TRAFFIC FLOW THROUGH THE HOME

LOCK OR TAPE OFF SENSITIVE/PRIVATE AREAS

CONSIDER SHOE COVERS FOR LIGHT-COLORED CARPETS OR SENSITIVE AREAS

ENSURE ALL ITEMS ARE WITHIN ARM'S REACH (NOTHING DANGEROUSLY HIGH)

## 3/ STAFFING

The right team sets the tone, manages the customer experience, and handles critical operational tasks that directly impact sales and safety. Understaffing leads to chaos, lost sales, theft, and unhappy customers who leave early.

### Positions to Fill

Each role serves a specific function, from creating a welcoming first impression to processing transactions and maintaining order. A well-staffed sale runs smoothly and allows you to focus on customer service rather than firefighting. The right team sets the tone, manages the customer experience, and handles critical operational tasks that directly impact sales and safety. Understaffing leads to chaos, lost sales, theft, and unhappy customers who leave early.

GREETER AT FRONT DOOR (CRITICAL FOR SETTING WELCOMING TONE)

CASHIER FOR PAYMENT PROCESSING

STAFF TO ASSIST SHOPPERS WITH PRICING QUESTIONS

STAFF TO HELP CUSTOMERS TO THEIR CARS

SECURITY/MONITORING AT ENTRY POINT

**Note:** Don't forget estate sales start early and run long. Do you have enough people to make sure everyone is getting a few breaks throughout the day?

### Staffing Considerations

Thinking through logistics ahead of time prevents confusion and ensures your team knows how to handle common scenarios. When staff understand their responsibilities and have the right tools, they can work independently and solve problems efficiently.

IDENTIFY/TRAIN UNIFORMS (BRANDED SHIRTS, APRONS, ETC.)

PLAN FOR ENTIRE DURATION OF SALE

HAVE TOOLS FOR DISASSEMBLING FURNITURE IF NEEDED

ASSIGN SOMEONE TO ASSIST WITH LARGE ITEM PICKUP

## Staff Appearance

Professional, identifiable staff immediately convey that your sale is organized and legitimate. A warm greeting at the door sets an emotional tone that makes shoppers feel welcome and more likely to spend time and money in your home.

WEAR EASILY IDENTIFIABLE CLOTHING

GREET SHOPPERS WITH SMILING, WELCOMING DEMEANOR

COMMUNICATE HOUSE RULES AND OPERATIONAL INFORMATION

MAINTAIN VISIBLE PRESENCE

## 4/ INVENTORY & ROOM-BY-ROOM ASSESSMENT

Taking a detailed inventory room by room gives you a complete picture of what you have to sell and helps you identify high-value items that need special attention. This assessment also reveals organizational opportunities and potential pricing strategies.

### Conduct a Property Walkthrough

A thorough walkthrough prevents you from overlooking valuable items and helps you understand the total volume of inventory. Documenting designers and brands as you go saves time during the pricing phase.

DOCUMENT ALL ITEMS ROOM BY ROOM

NOTE DESIGNER NAMES AND BRANDS

DETERMINE WHAT ITEMS TO SELL VS. KEEP/DONATE

IDENTIFY POTENTIAL HIGH-VALUE PIECES

LIST QUESTIONABLE ITEMS FOR RESEARCH

## Room-by-Room Checklist

Important items or categories. Breaking it down by room helps you think systematically about what's sellable versus what should be donated or discarded.

### Living Room/Family Room:

SOFAS AND SEATING

COFFEE TABLES AND SIDE TABLES

ARMCHAIRS

LAMPS AND LIGHTING

DECORATIVE ACCESSORIES

### Kitchen:

COFFEE MUGS AND DRINKWARE

GLASSWARE AND BOWLS

KITCHEN TOOLS AND GADGETS

SMALL APPLIANCES

PANTRY ITEMS

### Bedroom(s):

BEDROOM FURNITURE SETS

MATTRESSES AND BEDDING

NIGHTSTANDS AND DRESSERS

LAMPS

DECORATIVE PILLOWS AND STAGING ITEMS

### Closets:

CLOTHING (IF SELLING)

SHOES

ACCESSORIES AND HANGERS

VALUABLES (JEWELRY BOXES, WATCHES, ETC.) SET ASIDE FOR SPECIAL HANDLING

### Dining Room:

DINING TABLE AND CHAIRS

CHINA CABINETS

SERVING DISHES AND ENTERTAINING ITEMS

WALL ART

### Bathroom:

TOWELS

BATHROOM ACCESSORIES

MEDICINE CABINET ITEMS (IF APPROPRIATE)

## Garage:

- LAWN MOWERS
- YARD TOOLS
- SNOW BLOWERS
- HAND TOOLS
- EQUIPMENT AND MACHINERY

## Outdoor/Patio::

- PATIO FURNITURE
- DECK FURNITURE
- GARDEN ITEMS
- YARD DECORATIONS

## Basement/Storage Areas:

- HOLIDAY DÉCOR
- LUGGAGE
- EXTRA FURNITURE
- LAMPS AND STORED ITEMS
- ASSESS SAFETY FOR PUBLIC ACCESS
- PLAN WHETHER TO OPEN TO SHOPPERS OR PULL ITEMS OUT FOR STAGING

# 5/ STAGING

Thoughtful staging transforms your home from a cluttered residence into an appealing retail environment where shoppers can envision themselves buying. Every arrangement sends a message about quality and intentionality.

## General Principles

The goal of staging is to make every item seem desirable and worth purchasing by placing it in a context that makes sense. Accessible, well-organized displays encourage buying, while chaotic or unsafe displays deter shoppers.

- MAKE EVERYTHING LOOK INTENTIONAL
- KEEP ITEMS IN THEIR NATURAL ROOMS (BEDROOM FURNITURE IN BEDROOMS, KITCHEN ITEMS IN KITCHEN)

ENSURE EVERYTHING IS ACCESSIBLE AND WITHIN ARM'S REACH

AVOID HIGH SHELVES OR CABINETS WHERE ITEMS COULD FALL

CREATE VISUAL APPEAL AND INVITING DISPLAYS

## Room-Specific Staging

Each room has its own logic and aesthetic expectations, so staging should respect those natural groupings. This approach helps shoppers quickly find what they're looking for and feel confident about their purchases.

LIVING AREAS: ARRANGE SEATING AS IF ROOM IS IN USE

KITCHEN: DISPLAY ITEMS ON COUNTERS, ISLAND, OR STAGING TABLES

BEDROOMS: MAKE BEDS, ARRANGE PILLOWS, CREATE ATTRACTIVE DISPLAYS

CLOSETS: HANG CLOTHES NEATLY, ORGANIZE BY CATEGORY

STORAGE AREAS: UNPACK AND ORGANIZE; USE STAGING TABLES FOR DISPLAY

USE DISPLAY TABLES WHEN COUNTER/SHELF SPACE RUNS OUT

## Special Items

Jewelry, valuables, and fragile items require separate handling and display to protect them and maximize their sales appeal. Placing these items near the cash station ensures they stay secure while remaining visible and accessible to interested buyers.

JEWELRY: PREPARE JEWELRY TRAYS FOR DISPLAY

VALUABLES: STORE NEAR CASH STATION FOR SECURITY

FRAGILE ITEMS: ENSURE SAFE, PROTECTED DISPLAY

# 6/ PRICING STRATEGY

Proper pricing is both an art and a science that directly impacts your revenue and how quickly items sell. Underpricing leaves money on the table, while overpricing leaves items unsold.

## Initial Decisions

Before you price a single item, decide whether you're optimizing for maximum revenue or quick turnover. This choice should be consistent across your inventory to avoid confusing shoppers and undermining your credibility.

DECIDE PRICING APPROACH: MAXIMIZE PROFIT VS. QUICK SALES

DETERMINE IF ITEMS WILL BE NEGOTIABLE

PLAN FOR DISCOUNT TIERS IF DESIRED

## Research & Valuation

Spending time upfront to research what items are actually worth prevents you from leaving thousands of dollars on the table. Google Lens has revolutionized this process by making it easy to instantly compare your items to actual sales.

USE GOOGLE LENS TO PHOTOGRAPH ITEMS AND CHECK SALES HISTORY

CHECK EBAY FOR COMPARABLE SALES

USE WORTHPOINT FOR ANTIQUE VALUATIONS

CHECK LIVE AUCTIONEERS FOR AUCTION RESULTS

RESEARCH DESIGNER NAMES AND BRAND VALUES

IDENTIFY HIGH-VALUE ITEMS

## Pricing Methods

Different items benefit from different pricing approaches based on their value and appeal. Large, high-value items deserve individual attention, while small items can be grouped into convenient price points.

LARGE/EXPENSIVE ITEMS: HANDWRITTEN TICKETS WITH ITEM DESCRIPTION AND PRICE

SMALL ITEMS: PRICE GUN OR PRE-PRICED DOLLAR STICKERS

BULK ITEMS: CONSIDER FIXED BULK PRICING

## Pricing Considerations

Estate sale shoppers arrive specifically looking for bargains, so expect negotiation and build flexibility into your pricing. Being willing to negotiate not only closes more sales but also helps you move inventory that might otherwise sit unsold.

- EXPECT SHOPPERS ARE SEEKING DEALS
- BE PREPARED TO NEGOTIATE, ESPECIALLY ON EMOTIONAL ITEMS
- HAVE FLEXIBILITY IN PRICING

## 6/ CASH STATION SETUP

Your cash station is the operational hub where transactions happen, money is secured, and order is maintained. Strategic placement and proper setup ensure smooth operations while allowing you to monitor the entire sale.

### Physical Setup

The cash station location should be centrally visible yet protected from the traffic flow so staff can work without constant interruption. Direct sight lines to the front door let you monitor who's entering and leaving while processing transactions.

- DESIGNATE CENTRAL LOCATION IN MAIN TRAFFIC AREA (E.G., LIVING ROOM)
- ENSURE DIRECT LINE OF SIGHT TO FRONT DOOR
- SET UP TABLE OR COUNTER FOR TRANSACTIONS
- CREATE DESIGNATED HOLDING AREA FOR ITEMS ON HOLD

### Payment Processing

Choose a payment system that matches your comfort level and technical abilities—whether that's a sophisticated POS system or a simple receipt book. Whichever you choose, accurate record-keeping creates a settlement statement you can trust.

- CHOOSE PAYMENT METHOD (POINT OF SALE SOFTWARE, RECEIPT BOOKS, CASH BOX)

SET UP IPAD WITH POS SYSTEM (IF AVAILABLE) OR

OBTAIN SALES RECEIPT BOOKS (AVAILABLE AT OFFICE DEPOT, OFFICE MAX, ETC.)

HAVE CASH BOX WITH STARTING FLOAT

## Customer Support Items

Thoughtful touches like bags, wrapping, and a holding area remove friction from the shopping experience and encourage customers to buy more. When shoppers can easily transport and temporarily store items, they're more likely to continue shopping instead of leaving early.

SMALL GROCERY-STYLE BAGS

LARGER GARBAGE-STYLE BAGS (FOR CLOTHES PURCHASES)

WRAPPING PAPER

PROVIDE HOLDING AREA WHERE CUSTOMERS CAN PLACE ITEMS WHILE SHOPPING

ENSURE CUSTOMERS CAN PUT ITEMS ON HOLD

## Record Keeping

Detailed transaction records protect you financially and provide documentation for tax purposes if you're donating unsold items. Accurate tracking also helps you understand what sold well and what didn't for future sales.

RECORD ALL TRANSACTIONS

KEEP ITEMIZED LIST FOR SETTLEMENT STATEMENT

TRACK CASH RECEIVED VS. ITEMS SOLD

## Security Considerations

Keeping valuables and jewelry visible at the cash station balances accessibility with protection. A staff member stationed at this area can prevent theft and ensure valuable items don't disappear or get mixed with lower-priced merchandise.

PLACE VALUABLE/JEWELRY ITEMS NEAR CASH STATION

MONITOR ENTRY AND EXIT POINTS

KEEP VALUABLES IN VIEW AT ALL TIMES

# 7/ POST-SALE DISPOSITION

What happens to unsold inventory is just as important as the sale itself—it affects the environment, your final profit, and your peace of mind. Planning this phase ahead of time prevents you from being stuck with piles of unwanted goods.

## Charity Donations

Charities are selective about what they accept and book up quickly, especially during peak seasons. Contacting them weeks in advance ensures you have a confirmed pickup and maximizes the tax deduction value of your donations.

IDENTIFY PREFERRED CHARITIES (HABITAT FOR HUMANITY, SALVATION ARMY, LOCAL CHURCHES, ETC.)

CONTACT CHARITIES WEEKS IN ADVANCE (ESPECIALLY FOR SUMMER SALES)

CONFIRM PICKUP DATES AND TIMES

INQUIRE ABOUT WHAT ITEMS THEY ACCEPT (CHARITIES ARE SELECTIVE)

## Professional Appraisals

A professional appraisal of your donated items can significantly increase your tax deduction compared to guessing at values. This service is especially valuable if you have higher-end pieces or a large volume of donations.

ARRANGE FOR QUALIFIED APPRAISERS TO ITEMIZE DONATIONS

MAXIMIZE TAX DEDUCTION VALUE

OBTAIN DONATION RECEIPTS

## Junk Removal

Even after donations, there's almost always leftover debris that charities won't accept. Having a junk removal company lined up prevents you from being stuck with dumpsters full of unsellable items.

RESEARCH JUNK REMOVAL COMPANIES

GET QUOTES FOR POST-DONATION CLEANUP

SCHEDULE REMOVAL IN ADVANCE

PLAN FOR ITEMS CHARITIES WON'T ACCEPT

## Final Cleaning

A thoroughly cleaned home after the sale gives you closure and prepares the property for the next phase, whether that's putting it on the market, renting it, or simply moving forward. Professional cleaning ensures every trace of the sale is removed.

DECIDE: DIY VS. PROFESSIONAL CLEANING SERVICE

SCHEDULE CLEANING AFTER ALL REMOVAL IS COMPLETE

DEEP CLEAN ENTIRE PROPERTY

SWEEP, VACUUM, AND PREPARE FOR NEXT PHASE

## 8/ SPECIAL CONSIDERATIONS

Beyond the basics, thoughtful planning around security, valuables, and your own wellbeing ensures the sale goes smoothly and doesn't take an unnecessary emotional toll. These details separate a smooth event from a stressful one.

### Security & Access Control

Restricting public access to sensitive areas protects your privacy and prevents damage or theft. Clear visual barriers and signage prevent unwanted intrusions and reduce liability.

IDENTIFY AREAS WHERE PUBLIC ACCESS SHOULD BE RESTRICTED

LOCK OR CLEARLY MARK OFF-LIMIT AREAS

CONSIDER USING CAUTION TAPE

ASSIGN STAFF TO MONITOR RESTRICTED AREAS

### Valuable Items

Hidden jewelry and collectibles can accidentally be sold for pennies or even thrown away if not identified and separated early. A dedicated search of closets, drawers, and hidden spaces prevents devastating losses.

CONDUCT THOROUGH SEARCH OF CLOSETS, STORAGE AREAS, FURNITURE

IDENTIFY JEWELRY, HEIRLOOMS, IMPORTANT DOCUMENTS

KEEP VALUABLES SEPARATE AND SECURE

DISPLAY HIGH-VALUE ITEMS AT CASH STATION ONLY

## Emotional Support

Estate sales involve sorting through a lifetime of memories and decisions, which can be draining and difficult. Acknowledging the emotional weight and getting support—whether from professionals or loved ones—makes the process more manageable.

ACKNOWLEDGE THAT THIS PROCESS CAN BE EMOTIONALLY DIFFICULT

CONSIDER THE TIME COMMITMENT NECESSARY FOR FRIENDS AND FAMILY TO HELP

CONSIDER WHETHER PROFESSIONAL ASSISTANCE WOULD HELP

# 9/ TIMELINE PLANNING

A realistic timeline with clear milestones keeps you on track and prevents last-minute scrambling. Breaking the process into phases helps you pace the work and address tasks in logical order.

## Weeks Before Sale

Getting charitable organizations and service providers on your calendar early is essential since summer schedules fill quickly. This phase also gives you time to thoroughly research your inventory and develop a marketing strategy.

CONTACT CHARITIES AND JUNK REMOVAL COMPANIES

BOOK PROFESSIONAL SERVICES (IF USING)

PLAN MARKETING STRATEGY

BEGIN INVENTORY ASSESSMENT

## 1-2 Weeks Before

The final push before your sale focuses on preparation—making sure all materials are in place, staff are ready, and your property is pristine. This is also your window to ensure your marketing campaign is generating momentum.

COMPLETE PROPERTY ASSESSMENT

BEGIN PRICING RESEARCH

SET UP MARKETING MATERIALS

LAUNCH ADVERTISING CAMPAIGN

HIRE/CONFIRM STAFF

PURCHASE MATERIALS (BAGS, TAGS, ETC.)

## Days Before

These final days are about fine-tuning details and building confidence that everything is ready. A staff briefing ensures everyone understands procedures, and final staging touches create an inviting, professional environment.

FINAL PRICING AND TAGGING

DEEP CLEAN PROPERTY

SET UP CASH STATION

FINAL STAGING TOUCHES

BRIEF STAFF ON PROCEDURES

## During Sale

Your job during the sale is to execute the plan you've created while remaining flexible and responsive to customer needs. Stay present, be helpful, and maintain the professional atmosphere you've set up.

GREET SHOPPERS WARMLY

MONITOR PRICING AND HELP CUSTOMERS

PROCESS TRANSACTIONS

ASSIST WITH LARGE PURCHASES

MAINTAIN PROPERTY CONDITION

## Immediately After

The first hours and days after the sale are crucial—contact charitable organizations right away, dispose of remaining items quickly, and arrange for cleaning before debris accumulates. This momentum keeps you from getting stuck with unsold inventory.

FINAL PROPERTY WALKTHROUGH

CONTACT CHARITIES FOR PICKUP

SCHEDULE JUNK REMOVAL

PLAN FINAL CLEANING

SETTLE ACCOUNTS WITH STAFF

## 10/ KEY TAKEAWAYS

These principles form the foundation of any successful estate sale, regardless of the size or value of your inventory. Keeping these priorities in mind as you work through each phase will help you make confident decisions and achieve the best possible outcome.

- **Marketing is critical** — success depends on getting the word out effectively
- **Think like a retailer** — your home is now a retail store, not a residence
- **Plan ahead** — especially for charity pickups and junk removal (book weeks in advance)
- **Professional help has value** — consider whether hiring a professional company makes sense for your situation
- **Emotional awareness** — acknowledge the difficulty and plan accordingly
- **Flexibility matters** — be prepared to negotiate and adapt to customer needs
- **Safety first** — secure valuables, restrict access, and ensure physical safety throughout

## 11/ RESOURCES

These proven tools and organizations are referenced throughout the estate sale industry as best-in-class solutions for marketing, pricing research, and post-sale disposition. Familiarity with these resources will streamline your planning and execution.

- **Estate Sales.net** — Industry's largest estate sale listing website
- **Google Lens** — Use phone to photograph items and research values
- **eBay** — Compare pricing and completed listings
- **Worthpoint** — Antique valuation tool
- **Live Auctioneers** — Research auction prices
- **Local Charities** — Habitat for Humanity, Salvation Army, local churches
- **Local Junk Removal Companies** — Big brand and local options available