CLIENT INTAKE PACKET · FILLABLE

Commercial Brokerage Intake Packet

Everything we need to build your expiration and maturity radar, your owner and tenant cadence, requirement matching, your co-broker desk, the critical-dates calendar on every lease and PSA, and your Monday deal digest – the same system running at Snap Credit Fix today.

How to use this packet: fill in what you can, skip what you don't know, and we'll finish the rest together on the intake call. Type directly into the fields (works in Adobe Reader, Preview, Chrome, and most phones) or print and hand-write.

Sections 1-8 tell us who you are and how you work today. Section 9 is the monthly time audit – where your hours actually go. Section 11 shows the three packages and add-ons. Section 12 is a menu of what we can take off your plate; tick everything that sounds useful and write down your top three.

Nothing here commits you to anything. It becomes your one-page Client Brief and a fixed quote within two business days. **Return this packet through a secure upload link, not by email.**

COMPANY

YOUR NAME

DATE

EVERBORN CONTACT

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1. Company Basics

Legal company name (exactly as on your W-9)	DBA / brand name	Main phone

Main email	Website	Office address (city, state, zip)

Brokerage license number and state(s)	Principal / designated broker (name and license number)	Year founded

Markets and submarkets you cover	Affiliation (independent, national or regional CRE firm, franchise, team inside a larger firm)	Property types (office, retail, industrial, multifamily, other)

Sides you represent (tenant, landlord, seller, buyer, both)

Company type

- ☐ Independent commercial brokerage
- ☐ Team inside a national / regional CRE firm
- ☐ Tenant-rep-only firm
- ☐ Landlord / agency leasing firm
- ☐ Investment sales / capital markets team
- ☐ Multifamily investment specialist
- ☐ Retail / net-lease specialist
- ☐ Industrial / flex specialist
- ☐ Other

Other:

Services and deal types you actively offer

- ☐ Tenant representation (office, retail, industrial)
- ☐ Landlord / agency leasing
- ☐ Investment sales (seller representation)
- ☐ Buyer representation / acquisitions
- ☐ Multifamily investment sales
- ☐ Net-lease / 1031 replacement-property searches
- ☐ Sublease marketing
- ☐ Lease renewals and restructures
- ☐ Broker opinions of value (BOVs)
- ☐ Consulting / advisory (fee-based)
- ☐ Build-to-suit and development leasing
- ☐ Property management (in-house or affiliated)
- ☐ Debt and equity placement (with counsel review where securities apply)
- ☐ Syndication / TIC / DST introductions (securities counsel required)

Other:

Leases and sales closed per year (avg), by side	Average deal size (SF or price) and average fee	Average months from engagement to lease execution or close	12-month closed-deal or fee goal

In one or two sentences, who is your ideal client – the tenant, landlord, owner or investor you want to represent – and why do they call you instead of the next broker?

2. Your Team

Everyone who touches a lead, a customer, or a partner. We use this to set up users, round-robin, calendars, and the Monday report.

NAME	ROLE (Principal / designated broker / Senior broker / partner / Associate broker / agent / Leasing agent / Research analyst / financial analyst / Marketing coordinator / Transaction / closing coordinator)	LICENSE / ID # (IF ANY)	EMAIL	CELL	GETS LEADS?
					☐
					☐
					☐
					☐
					☐

NAME	ROLE (Principal / designated broker / Senior broker / partner / Associate broker / agent / Leasing agent / Research analyst / financial analyst / Marketing coordinator / Transaction / closing coordinator)	LICENSE / ID # (IF ANY)	EMAIL	CELL	GETS LEADS?
					☐
					☐

Decision maker (signs the agreement)

Day-to-day contact for the build

Who approves outgoing emails / texts?

Who owns compliance review?

How are new leads assigned today?

☐ Listing broker gets every inquiry on their listing
☐ Relationship owner keeps every inquiry from their clients
☐ Round robin (by rule) for unassigned inquiries
☐ By property type or specialty
☐ By market / submarket
☐ Principal assigns manually

Other:

What is the one thing about how the team works that you would NOT want an automated system to change?

3. Brand & Voice

So every text, email, page, and printout sounds and looks like you from day one.

Tagline / one-liner

Brand colors (hex or 'see logo')

Fonts (if known)

Assets you can send us

☐ Logo (PNG/SVG, light + dark)
☐ Broker headshots and bios
☐ Offering memorandum and flyer templates (Buildout or other)
☐ Past deal tombstones / case studies (client-approved)
☐ Market reports and research
☐ Property photography, aerials and stacking plans
☐ Listing / pitch presentations and BOV template
☐ Existing landing pages

Other:

Google Business Profile link

Review links (Google Business Profile / LinkedIn company page and broker profiles / CoStar / LoopNet broker profiles / Crexi broker profile / Client testimonials (private, approval-based))

Facebook page

Instagram

LinkedIn

YouTube / TikTok

Tone you want in customer communication

☐ Warm & plain-spoken
☐ Professional
☐ High-energy
☐ Educational / advisor
☐ Bilingual (specify)

Other:

Required disclosure line(s) for all marketing (e.g. 'Harbor Commercial Advisors, Inc. – Licensed Real Estate Broker, CA DRE #01234567') – paste it exactly

Paste the exact brokerage name and license line that must appear on every page, email footer, flyer, OM and card.

Anything we must NEVER say or promise? (e.g. a rent, price, cap rate or value in an automated message, "zoned for", "clean site", square footage without a source, tax or 1031 outcomes, investor returns, "standard commission", confidential terms from another deal)

4. Current Tools & Access

List what you use now. We will decide together what gets replaced, connected, or left alone. 'Cost' can be a guess.
K = keep · R = replace with the new system · C = connect / integrate · ? = not sure

CATEGORY	TOOL / VENDOR	WHO HOLDS THE LOGIN	MONTHLY COST	K / R / C / ?
Business phone / texting				
Email hosting (Google Workspace / Microsoft 365)				
Domain registrar & DNS				
Website host / builder				
CRM (Apto, ClientLook, Rethink / Salesforce, other)				
Market data and comps (CoStar, CompStak, Reonomy, other)				
Listing platforms (LoopNet, Crexi, local CIE)				
Marketing, flyer and OM builder (Buildout, other)				
Parcel and ownership (county assessor / recorder, LightBox, Regrid)				
Underwriting and valuation (ARGUS Enterprise, Excel)				
E-signature (DocuSign, other)				
Virtual data room (Buildout / Crexi deal room, Dropbox, Box)				
Email marketing (Buildout, Mailchimp, Constant Contact)				
Direct mail vendor				
Skip tracing / owner contact data (flag for consent review)				
LinkedIn / Sales Navigator				
Calendar / booking and tour scheduling				
Accounting / commission tracking (QuickBooks, other)				
Spreadsheets / deal and expiration trackers				
Other				

Roughly what does all of that cost per month, combined? And which tool frustrates the team most?

Do you already have a GoHighLevel account?

☐ No ☐ Yes – we own it ☐ Yes – through another agency ☐ Not sure

5. Where Leads Come From Today

Tick each source and give a rough monthly count. Guesses are fine; we'll replace them with real numbers in week one.

SOURCE	PER MONTH	SOURCE	PER MONTH
☐ LoopNet inquiries		☐ Crexi inquiries	
☐ CoStar / local CIE		☐ Sign calls on listed property	
☐ Website / contact form		☐ Lease-expiration prospecting (tenants)	
☐ Loan-maturity and hold-period prospecting (owners)		☐ Direct mail to owners	
☐ Cold calls (manual dialing, DNC-checked)		☐ Email campaigns to owners, tenants and investors	
☐ Broker-to-broker referrals and co-brokerage		☐ Attorney, CPA and lender referrals	

SOURCE	PER MONTH	SOURCE	PER MONTH
☐ LinkedIn		☐ Repeat clients and renewals	
☐ Industry events (CCIM, SIOR, ICSC, NAIOP, local groups)		☐ Other:	

Prospect contact to meeting %	Meeting to signed listing / representation agreement %	Proposal or LOI to executed lease / PSA %	PSA or lease negotiation to closed / executed %

Walk us through the first 5 minutes after a lead arrives right now. Who sees it, how, and how fast does a human respond?

What happens to a lead that doesn't answer the first call? How many attempts, over how many days, and who tracks it?

What happens to someone who isn't ready to buy yet? Do they ever hear from you again?

Which of these leak the most business today?

- ☐ Lease expirations noticed too late to win the assignment
- ☐ Owners with maturing loans never contacted
- ☐ Owner and tenant history lives in one broker's phone
- ☐ Tenant requirements and buy boxes are out of date
- ☐ New listings not matched to every requirement that fits
- ☐ Co-broker registrations tracked by email
- ☐ PSA and lease critical dates tracked in one spreadsheet
- ☐ Landlords and sellers ask weekly for an activity update
- ☐ Closed deals never turned into tombstones or referral asks

Other:

6. Pipeline

We will build your pipeline exactly as you run it. Edit the stages below or write your own; tell us what should happen automatically at each one.

Suggested stages: Leasing: Prospect → Contacted → Meeting → Representation Signed → Marketing / Touring → Proposal / LOI → Lease Negotiation → Lease Executed → Occupancy
Investment sales: Prospect → Contacted → BOV Delivered → Listing Signed → Marketing / CA & OM → Call for Offers → LOI → PSA Executed → Due Diligence → Deposit Hard → Closed
Side lanes: Owner Long-Term (not selling yet) · Tenant Expiration Watch · Buyer / Tenant Requirement (active, incl. 1031) · On Hold (financing, partnership, litigation) · Lost / Went Elsewhere

Your actual stages, in order (or 'use suggested')

STAGE	WHAT SHOULD HAPPEN AUTOMATICALLY HERE? (TEXT, EMAIL, TASK, NOTIFY A PARTNER)	WHO IS RESPONSIBLE

Do you track every tenant's lease expiration and every owner's loan maturity in a system that turns them into tasks today? ☐ Yes ☐ No

Do landlords and sellers get a weekly activity report without anyone building it by hand? ☐ Yes ☐ No

Do you track every PSA and lease critical date (DD end, deposit hard, rent start, option notice dates) in a system that alerts you? ☐ Yes ☐ No

7. Referral Partners

The people who send you business. This is usually the biggest growth lever and the least tracked.

PARTNER TYPE	HOW MANY ACTIVE	TOP 3 NAMES	HOW THEY SEND YOU BUSINESS TODAY	HOW YOU KEEP THEM UPDATED

Partner types

- ☐ Out-of-market and cooperating brokerages
- ☐ Real estate attorneys
- ☐ Lenders and mortgage brokers
- ☐ Title and escrow officers
- ☐ 1031 qualified intermediaries
- ☐ CPAs
- ☐ Property managers
- ☐ Architects, space planners and general contractors
- ☐ Appraisers

Other:

How do you track which partner sent which customer, and does the partner ever see that record?

What do you do for partners today (co-branded material, events, updates)? What would you like to do?

Note. Referral and co-brokerage fees move only broker to broker, under a written referral or commission agreement, paid through the brokerages. Attorneys, lenders, title, QIs, CPAs, property managers and contractors get a reporting-only lane (attribution and a recognition note, no fee); paying unlicensed people for real estate referrals is restricted in most states. RESPA generally does not reach business-purpose commercial loans, but counsel confirms per deal. Anything involving investors, syndications, TICs or DSTs goes to securities counsel before it is built.

Partners you want to add in the next 90 days (#)

Who owns partner relationships?

8. After the 'Yes'

Documents or items you chase most often

- ☐ Signed listing, tenant or buyer representation agreement with commission terms
- ☐ Agency / dual-agency disclosures required by the state
- ☐ Confidentiality agreements from buyers and tenants
- ☐ Rent roll and T-12 operating statement
- ☐ Leases, amendments and SNDAs
- ☐ Tenant estoppel certificates
- ☐ Title report / title commitment and ALTA survey
- ☐ Phase I Environmental Site Assessment (ASTM E1527-21)
- ☐ Zoning verification letter and property condition report
- ☐ Tenant financials (under CA) and certificates of insurance
- ☐ Signed LOI and executed PSA or lease with all amendments
- ☐ Co-broker commission agreements

Other:

How are documents collected today?

Avg. days to a complete file

Who chases missing items?

What happens after the sale today?

- ☐ Closing / lease-execution thank-you from the broker
- ☐ Client-approved tombstone / case study
- ☐ Google review or private testimonial request
- ☐ Referral ask
- ☐ Renewal-option and expiration dates added to the radar
- ☐ Requirement or buy-box refresh
- ☐ Quarterly market note
- ☐ Nothing consistent

Past customers in your database (#)

Last time they all heard from you

% of business from repeat / referral

Describe your dream after-the-sale program in one paragraph. What would make a past customer call you first next time?

9. Monthly Time Audit

Where the hours actually go. Estimate hours per month per task and who does it. This tells us what to automate first and how to price the monthly.

RECURRING TASK	HOURS / MONTH	WHO DOES IT	PAIN (1-5)	AUTOMATE?
Answering / calling back new inquiries				☐
Tracking lease expirations and loan maturities				☐
Owner and tenant check-ins (calls, mail, email)				☐
Building prospecting call and mail lists				☐
Researching ownership and tenants				☐
Updating tenant requirements and investor buy boxes				☐
Matching new listings to requirements				☐
Sending teasers and collecting confidentiality agreements				☐
Preparing flyers, OMs and BOVs				☐
Booking tours and collecting feedback				☐
Logging co-broker registrations				☐
Weekly landlord and seller activity reports				☐
Tracking proposals, LOIs and counters				☐
Tracking PSA and lease critical dates				☐
Chasing diligence and closing documents				☐
1031 date tracking with QIs				☐
Writing tombstones and case studies				☐
CRM data entry and cleanup				☐
Invoicing and chasing retainers or consulting fees				☐
Figuring co-broker and broker splits				☐
				☐
				☐

What do you dread every month? What always falls through the cracks?

What would you do with 20 extra hours a month?

If this were running perfectly 90 days from now, what would be different? (Be specific: numbers, feelings, what you'd stop doing.)

10. Your Operating Rhythm -- reports and recurring tasks

Tick the reports you actually run or receive, and tell us where each comes from and who pulls it. 'We can make it' is our proposal: FULL = runs by itself, you just receive it · SEMI = we build it, one person approves or does one step · ASSIST = a person still does it, we prep, remind, log and report. In the last column tell us what you want: F / S / K (keep manual).

REPORT / RECURRING TASK	RUN IT?	WHERE IT COMES FROM TODAY	WHO PULLS IT	WE CAN MAKE IT	YOU WANT
Monday Deal Calendar (PSA and lease dates in next 30 days)	☐			FULL	
Expiration and Maturity Call List (this week)	☐			FULL	
Landlord / Seller Activity Report (per listing)	☐			FULL	
Tour and Feedback Log	☐			FULL	
Co-Broker Registration Log	☐			FULL	
Proposal / LOI Log and Expiring LOIs	☐			FULL	
Due-Diligence Outstanding Items	☐			FULL	
1031 Deadline Watch	☐			FULL	
Requirement / Buy-Box Freshness	☐			FULL	
Listing-to-Requirement Match Report	☐			SEMI	
Lead Source Report / Response Time	☐			FULL	
Pipeline Value and Fee Forecast by Stage	☐			SEMI	
Broker Scorecard	☐			FULL	
Marketing Compliance Log (brokerage name, consents, opt-outs)	☐			FULL	
BOV / Comp Package Prep	☐			ASSIST	
Commission statement per broker	☐			FULL	
	☐			--	
	☐			--	

Other things done on a schedule that aren't on the list

Think: Monday deal-calendar review, weekly expiration call block, weekly owner reports, quarterly requirement and buy-box refresh, monthly market note, renewal-option notice dates, license renewals and CE, annual market report.

TASK	DAILY / WEEKLY / MONTHLY	SYSTEM OR WEBSITE IT LIVES IN	WHO DOES IT	HOURS / MO	F / S / K

Which of these would you hand off tomorrow if you trusted the output? Which ones would you never hand off?

The logins and portals your team touches every day go on the **Logins & Portals** page near the end.

11. Starting Points -- the three packages

Three packages, one system. Everything in Launch is in Growth; everything in Growth is in Full Engine. Prices are starting points, confirmed in your written quote.

Launch

$3,500 build, starting point

then **$697 / mo**, platform included

Foundation + every lead answered fast. For a small team whose main leak is response time and follow-up.

Growth

$6,500 build, starting point

then **$1,197 / mo**, platform included

Launch + onboarding, retention, database re-activation, your industry engine, the AI assistant and the full Monday report. The package most businesses land on.

Full Engine

$9,500 build, starting point

then **$1,697 / mo**, platform included

Growth + the referral-partner program with statements, partner outreach, recruiting, every operating-rhythm automation and the monthly automation think-tank.

For a commercial brokerage: Launch covers a sub-60-second reply on every LoopNet, Crexi and website inquiry, sign call and missed call, listing-broker and relationship-owner routing with a claim window, booking and tour calendars, lead-source tagging, the closing review request and the compliance shell (brokerage name and license on everything, CAN-SPAM footers, DNC checks and manual dialing, consent before any text); Growth adds the Expiration-to-Close Engine – the expiration and maturity radar, the owner and tenant cadence, the requirement registry, CA-gated offering flow, the tour and activity loop, the co-broker registration desk, proposal and LOI tracking, the critical-dates calendar, the diligence document chase and closed-deal tombstones – plus onboarding, re-activation and the full Monday report; Full Engine adds broker-to-broker referral statements, reporting-only lanes for attorneys, lenders, title, QIs, CPAs and property managers, recruiting for analysts and brokers, and every operating-rhythm automation.

INCLUDED IN GROWTH AND FULL ENGINE

The Expiration-to-Close Engine

- Expiration and Maturity Radar: lease expirations, option notice dates and loan maturities turned into dated prospecting tasks at your windows
- Owner and Tenant Prospecting Cadence: quarterly market notes and check-ins for years, email and mail first, under the broker's name
- Tenant and Buyer Requirement Registry: every requirement and buy box on file, refreshed by form, matched to every new listing
- Confidentiality-Gated Offering Flow: teaser, e-signed CA, then the OM and data room, with open tracking and offer deadlines
- Tour and Activity Loop: tours booked, feedback collected, weekly landlord and seller activity report
- Co-Broker Registration Desk: outside-broker registrations date-stamped with tour history and agreement status
- Proposal and LOI Tracker: every proposal and LOI logged with terms and expiry; drafting checklist for the attorneys
- Critical Dates Calendar: every PSA and lease date back-solved from the effective date, with 1031 staff reminders
- Due-Diligence and Closing Document Chase: rent roll, T-12, estoppels, SNDAs, title, survey, Phase I – tracked until checked in
- Closed-Deal Tombstone and Referral Ask: client-approved tombstone, review request and referral ask

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
FOUNDATION				
White-labeled platform workspace	Your CRM, pipelines, calendars, phone, email and automations in one place under your brand; licence included in the monthly	●	●	●
Branded email + business phone line	Your domain email and a tracked local number with call routing and recording (with disclosure)	●	●	●
Forms, booking pages and consent capture	Every form, landing page and calendar records written consent to call and text, with a privacy link	●	●	●
Business texting registration (A2P 10DLC)	We prepare the whole submission – EIN, address, privacy policy, sample messages matched to your consent language – and drive it through carrier review. You submit it under your own business identity, as the carriers require	●	●	●
Compliance shell	Timestamped consent records, opt-outs honored on every channel, quiet hours, required disclosure lines and a blocked-phrase list on every template	●	●	●
SALES ENGINE				
Pipeline built to your stages	Your process mapped into stages with side lanes, named the way your team talks	●	●	●
Instant response + round robin	Text + email to every new lead in under 60 seconds; claim-window assignment with automatic reassignment	●	●	●
Missed-call text-back	Every missed call gets a text with a booking link	●	●	●
5-day follow-up drip	Stops the moment they reply or opt out	●	●	●
Long-term nurture	Sized to your buying cycle, with a re-engagement alert when someone comes back	–	●	●
Appointments	Booking calendars per person, confirmations and reminders	●	●	●
Lead-source tagging	Every lead tagged by source at entry, so cost per sale by source is arithmetic	●	●	●

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
Review requests	At the right moment after the sale, sent to everyone, never filtered by sentiment	●	●	●
After-hours AI assistant	Answers, qualifies and books when nobody is there, fenced by your industry's never-list	–	●	●
OPERATIONS & RETENTION				
Branded email templates	Your identifiers locked into every template	–	●	●
Client onboarding + invoicing	Welcome, what-happens-next, secure document upload, e-sign, payment links with reminders	–	●	●
Document / signature chase	Reminders with secure upload links until the checklist is complete; live checklist for staff	–	●	●
Database re-activation campaign	Old leads and past customers worked in a ramped, bounce-guarded, auto-unsubscribe campaign	add-on	●	●
Retention program	Anniversaries, check-ins, renewals, and the save flow when someone tries to leave	–	●	●
Industry engine: The Expiration-to-Close Engine	Expiration and Maturity Radar; Owner and Tenant Prospecting Cadence; Tenant and Buyer Requirement Registry; Confidentiality-Gated Offering Flow; Tour and Activity Loop; Co-Broker Registration Desk; Proposal and LOI Tracker; Critical Dates Calendar; Due-Diligence and Closing Document Chase; Closed-Deal Tombstone and Referral Ask	–	●	●
Per-rep landing pages + QR cards	Each rep gets a page and card that feed the same pipeline with automatic credit	–	●	●
MONEY DESK				
Owner-routed onboarding	Every new client gets the welcome from their own rep: the rep's name, the rep's email and the rep's own sign-up link, so the file lands in that rep's queue. One message per client, never duplicates. For you: per broker.	–	●	●
Billing that runs itself	Branded invoice email; a reminder ladder (3 days before due, due day, a 3-day grace nudge, a final notice at 7 days); card-on-file autopay with a 'charge coming up' notice and a 'card declined, update your card' notice; receipts; invoice defaults (terms, due days, logo, from address). Email-first. For you: retainers, consulting and BOV fees, if you charge them.	–	●	●
Commission ledger	Commissions calculated from money actually collected, not signed deals, using your own plan rules (splits, first-half / second-half payouts, clawbacks, lead-type rates), with a monthly statement per rep and a 'needs attention' list. For you: co-broker splits and your broker and agent splits.	–	–	●
PARTNERS & GROWTH				
Referral partner program	Tracked link and printed QR card per partner; attribution written automatically at lead creation	add-on	add-on	●
Printable partner materials	Welcome packet, counter cards, one-pagers, version-numbered	–	–	●
Monthly partner statements	Sent automatically; what a statement may contain is set by the law in your industry	add-on	add-on	●
Partner outreach campaign	A campaign to add partners in your territory, tracked in a partner pipeline, with a no-fee version wherever a fee is illegal	add-on	add-on	●
Partner lanes	A separate pipeline and cadence per partner type	–	add-on	●
Recruiting funnel	Landing page, application, drip, interview booking; who it recruits is set for your industry	–	–	●
COMMAND & CONTROL				
Daily recap	End-of-day summary: leads, response times, appointments	●	●	●
Monday owner's report	Launch: the weekly funnel report. Growth and up: the full owner's report, written as what the business accomplished	○ lite	●	●
Live dashboard	One screen for the owner and managers instead of four logins	add-on	●	●
Operating-rhythm automations	The daily / weekly / monthly reports and tasks you mark in section 10	–	–	●
Internal task and alert flows	Unclaimed lead, stalled file, deadline at risk, negative review, manager escalation	–	–	●
Written procedures	Your team's own operations written down	–	–	●
Monthly business report	In addition to the weekly report	add-on	add-on	●
Handoff booklet + training	Every automation documented with screenshots; team trained; Full Engine keeps it current	●	●	●
Priority support	Named contact, weekly 20-minute call, same-day changes	–	–	●
Monthly automation think-tank	A working session every month: we find what your team still does by hand and design and build a custom automation for it	–	–	●

● = included · ○ lite = lighter version (see description) · add-on = available on that package at the add-on price · – = not included.

Every monthly includes the platform licence for your white-labeled workspace ($197 value) – one bill, no separate software vendor. $197 off the monthly if you already own your own HighLevel account. Ad spend and carrier fees billed at cost. Build fee half at signature, half on delivery. Month-to-month after the first 90 days. Add-ons bought with the build are 15% less than added later. Regulated industries get a compliance review in week one at no charge. You own everything: accounts, data, scripts, documents.

Add-ons – attach to any package (fixed fees; starting points, confirmed in your written quote). Tick any you want quoted.

QUOTE IT?	ADD-ON	FEE	NOTE
WEBSITES & SEARCH			
☐	**Online Presence: Starter (bundle)**	**$1,800**	Core site + Local SEO foundation + social profile set-up; $2,200 separately
☐	**Online Presence: Complete (bundle)**	**$3,200**	Full site + Local SEO foundation + brand kit + social profile set-up; $4,000 separately; first month of Local SEO growth free
☐	**Website build: core site**	**$1,200**	Up to 6 pages (home, about, services/products, apply/contact, reviews, compliance/disclosures); lead capture and booking wired to the CRM; mobile, speed and basic on-page SEO
☐	**Website build: full site**	**$2,400**	Up to 15 pages, including per-product/service pages, location pages, team or rep pages, a recruiting page and blog set-up
☐	**Website redesign / migration**	**$900**	Existing site rebuilt or moved, with redirects kept so rankings are protected
☐	**Additional pages (per 5)**	**$350**	Product, location, landing or partner pages
☐	**Local SEO foundation**	**$750**	Google Business Profile optimization, top citations with consistent name/address/phone, on-page SEO and schema, Search Console and analytics set-up, a service-area page plan
☐	**Google Business Profile set-up & optimization**	**$250**	Standalone, if Local SEO foundation isn't bought
☐	**Brand kit**	**$600**	Logo refresh, colors, fonts, email signature, social and document templates
☐	**Social profile set-up**	**$250**	Branded Facebook, Instagram, LinkedIn and YouTube profiles linked to the CRM
☐	**Accessibility review & fixes**	**$450**	WCAG review of the site, with the fixes made
☐	**Google Ads account build**	**$600**	One-time campaign build; ongoing management is the paid ad management line
☐	**Local SEO growth (monthly)**	**$350 / mo**	2 articles a month, weekly Google Business Profile posts, citation and review monitoring, a rank and traffic report
☐	**Website care plan (monthly)**	**$49 / mo**	Hosting, updates, backups, uptime monitoring, compliance-page upkeep and small edits
REVENUE CHANNELS			
☐	**Referral / affiliate program**	**$3,500**	Included in Full Engine
☐	**Partner prospect research (per 100 contacts)**	**$750**	
☐	**LinkedIn prospecting pipeline**	**$1,200**	
☐	**Cold outreach engine (per engine)**	**$3,500**	
☐	**Owned-list reactivation**	**$1,500**	Included in Growth and up
SYSTEMS & DATA			
☐	**Third-party integration**	**$2,500**	Connects the platform you already run on
☐	**Payment processor migration**	**$900**	Paying clients moved to new payment links or card-on-file; old invoices cancelled only after payment clears
☐	**Client data migration**	**$1,500**	
☐	**Custom reporting automation**	**$2,500**	
☐	**Executive reporting**	**$1,200**	Monthly business report included in Full Engine
☐	**Performance dashboard**	**$1,800**	Live dashboard included in Growth and up
CREATIVE & COLLATERAL			
☐	**Video ad production**	**$1,500**	
☐	**Document set**	**$2,000**	
☐	**QR capture system**	**$900**	
☐	**Lead magnet**	**$1,200**	Includes the capture page and follow-up
STRATEGY & RISK			
☐	**Growth audit & 12-month plan**	**$2,500**	
☐	**Industry compliance review**	**$1,500**	Week-one review free in regulated industries; this is the full written review
☐	**Messaging & carrier registration**	**$900**	Registration prep is included in every package
☐	**Operations audit**	**$1,500**	

QUOTE IT?	ADD-ON	FEE	NOTE
ONGOING -- BILLED MONTHLY			
☐	**Paid ad management**	**$800 / mo**	Ad spend billed direct to the platform
☐	**Additional campaign management**	**$400 / mo**	
☐	**Partner channel management**	**$600 / mo**	
☐	**Deliverability & compliance monitoring**	**$300 / mo**	
☐	**Content production**	**$700 / mo**	

We never guarantee search rankings or traffic. Bundle prices replace the 15% with-the-build add-on discount; they don't stack.

Which package are you leaning toward?

☐ Launch ☐ Growth ☐ Full Engine ☐ Not sure – recommend one

Anything about the packages or add-ons you want us to explain on the call?

12. What We Can Take Off Your Plate

Tick everything that sounds useful. Write your top three below. This becomes the build order.

[L] included in Launch and up · [G] Growth and up · [F] Full Engine · [+] add-on, any package

INQUIRIES ANSWERED

- ☐ Instant reply to every LoopNet, Crexi, sign-call and website inquiry, under 60 seconds, under your brand [L]
- ☐ Listing-broker and relationship-owner routing with a claim window for unassigned inquiries [L]
- ☐ Missed-call text-back with a booking link (to callers who reached out) [L]
- ☐ Booking and tour calendars per broker [L]
- ☐ Lead-source tagging so you know which channel produces assignments and fees [L]
- ☐ After-hours AI assistant that confirms availability, collects size, timing and buy-box details and books a call – never states rent, price, cap rate or tax outcomes [G]

OWNERS & TENANTS

- ☐ Expiration and maturity radar that turns lease and loan dates into dated tasks [G]
- ☐ Multi-year owner and tenant cadence: quarterly market notes, annual check-ins, replies routed to the broker [G]
- ☐ Weekly prospecting call list built from the radar with DNC checks (dialing stays manual) [G]
- ☐ Re-activation of your old owner, tenant and investor lists (email and mail first; bounce-guarded) [G]
- ☐ Weekly landlord and seller activity report per listing [G]
- ☐ Client-approved tombstone, review request and referral ask at close [G]

LISTINGS & REQUIREMENTS

- ☐ Tenant requirement and investor buy-box registry with refresh requests [G]
- ☐ Listing-to-requirement matching with drafted outreach for broker approval [G]
- ☐ Teaser, e-signed confidentiality agreement, then OM and data room release [G]
- ☐ Tour booking and feedback requests to the touring broker [G]
- ☐ Co-broker registration log with date stamps and tour history [G]
- ☐ Per-broker landing pages and QR cards [G]

DEAL TO CLOSE

- ☐ Proposal and LOI log with expiry alerts [G]
- ☐ Critical-dates calendar back-solved from the PSA or lease effective date [G]
- ☐ Diligence and closing document chase with a live board per deal [G]
- ☐ 1031 45/180-day staff reminders (the QI and CPA advise) [G]
- ☐ Wire-fraud warning built into closing templates [L]
- ☐ Internal alerts: critical date within 5 days, LOI expiring, option notice date approaching [F]

PARTNERS & GROWTH

- ☐ Broker-to-broker referral program with written agreements and statements [F]
- ☐ Reporting-only lanes for attorneys, lenders, title, QIs, CPAs and property managers [F]
- ☐ Partner outreach campaign to attorneys, CPAs and lenders [F]
- ☐ Recruiting funnel for analysts, associates and brokers [F]
- ☐ LinkedIn prospecting pipeline to owners and tenants [+]
- ☐ Document set: flyer, OM, BOV and tombstone templates [+]

COMMAND & CONTROL

- ☐ Compliance shell: brokerage name and license on everything, consent capture, opt-outs across channels, CAN-SPAM footers [L]
- ☐ Daily recap and weekly funnel report [L]
- ☐ Full weekly owner's report and live dashboard [G]
- ☐ Monday deal-calendar digest and monthly business report [F]
- ☐ Handoff booklet documenting every automation [L]
- ☐ Monthly automation think-tank: a working session to design and build a custom automation for whatever your team still does by hand [F]

MONEY DESK

- ☐ Owner-routed onboarding: every new client gets the welcome from their own broker – the broker's name, email and own sign-up link – so the file lands in that broker's queue; one message per client, never duplicates [G]
- ☐ Billing that runs itself for retainers, consulting and BOV fees (if you charge them): branded invoice email, a reminder ladder (3 days before, due day, 3-day grace, final notice at 7 days), card-on-file autopay with 'charge coming up' and 'card declined' notices, receipts [G]
- ☐ Commission ledger for co-broker splits and your broker and agent splits: commissions calculated from money actually received, using your own plan rules, with a monthly statement per broker and a 'needs attention' list [F]

Top pick #1 ______

Top pick #2 ______

Top pick #3 ______

Anything you want that isn't on the list

______

13. Compliance & Consent

Your industry's marketing is regulated. We build the guardrails in; you tell us your rules.

Which apply to you?

- ☐ State real estate license law covers commercial sales and leasing for others (e.g. California B&P 10131); brokerage name (and license number where required) in all advertising
- ☐ Agency, dual-agency and designated-agency disclosures per state
- ☐ Commission agreements in writing (some states require it to enforce, e.g. California Civil Code 1624); commercial broker lien laws in many states – your counsel's templates
- ☐ Referral and co-brokerage fees broker to broker only, in writing; no payments to unlicensed persons (e.g. California B&P 10137)
- ☐ RESPA: business-purpose commercial loans are generally exempt (12 CFR 1024.5(b)(2)); a 1-4 unit or mixed-use property with a consumer-purpose loan can be covered – confirm per deal with counsel
- ☐ NAR settlement practice changes are focused on residential; commercial property on a CIE is not subject to the written buyer agreement rule
- ☐ Securities: no investor solicitation, return promises or transaction-based pay for syndications, TICs or DSTs without securities counsel sign-off (broker-dealer registration may apply)
- ☐ TCPA: consent before texting or autodialed / prerecorded calls to cell phones, business-to-business included; National and internal Do-Not-Call check before prospecting calls
- ☐ CAN-SPAM footer and opt-out on every marketing email (no business-to-business exception)
- ☐ Fair housing on multifamily leasing copy and ad targeting
- ☐ 1031: reminders only; no tax advice; QI holds funds
- ☐ Confidentiality: one client's terms and tenant financials never shown to another without written permission

Other: ______

Is the team currently texting owners or tenants, and do you have written consent from them?	☐ Yes	☐ No
Do you use skip-traced or purchased phone data for owner prospecting?	☐ Yes	☐ No
Do you ever introduce investors, raise equity, or place clients into syndications, TICs or DSTs?	☐ Yes	☐ No
Does anyone review flyers, OMs and email blasts before they go out?	☐ Yes	☐ No

Compliance officer / attorney (name, email) ______

Turnaround needed for approvals ______

Any past complaints, audits, or rules from a regulator we should design around?

______

14. Reporting & Communication

Who receives the Monday report? (names, emails)

Best day / time

Numbers you care about most

- ☐ Inquiries by source
- ☐ Speed to first response
- ☐ Expirations and maturities in the next 24 months (count)
- ☐ Owner and tenant touches completed
- ☐ Meetings booked
- ☐ Listings and representation agreements signed
- ☐ Listings matched to requirements
- ☐ CAs signed, OMs opened and tours held
- ☐ Proposals and LOIs issued and received
- ☐ Leases and PSAs executed
- ☐ Pipeline value and fee forecast by stage
- ☐ Closed deals and fees by source

Other:

How do you want us to communicate during the build?

- ☐ Text
- ☐ Email
- ☐ Weekly call
- ☐ Shared doc
- ☐ Slack / Teams

15. Access Checklist

We will request these on the intake call. Tick what you can provide now. Nothing is changed without your sign-off.

- ☐ Domain registrar / DNS login (or add us as a user)
- ☐ Google Workspace / Microsoft 365 admin (branded email + calendars)
- ☐ Website host / builder login
- ☐ CRM export (contacts, companies, properties, deals, notes)
- ☐ Tenant list with lease expirations and option dates (CSV), and the data source's license terms
- ☐ Owner list with loan maturities or purchase dates where known, and consent status
- ☐ Active requirements and investor buy boxes
- ☐ Active listing and deal list with PSA and lease effective dates
- ☐ Current flyer, OM, CA, LOI and BOV templates
- ☐ LoopNet and Crexi account access (or lead-notification forwarding)
- ☐ Google Business Profile manager access and LinkedIn page admin
- ☐ Brokerage license numbers and required advertising line
- ☐ Company EIN, legal address and website with privacy policy (required for business texting registration)
- ☐ Existing phone number(s) to port or forward

Anything else we should know before we start?

Logins & Portals

The systems we will need to reach during the build. Fill in what you can; leave a row blank if you'd rather share it live on the intake call. Where a system lets you add us as a user, do that instead of sharing your own password.

PORTAL	WEB ADDRESS	USERNAME	PASSWORD	2FA / WHO GETS THE CODE
CoStar	costar.com			
LoopNet	loopnet.com			
Crexi	crexi.com			
Buildout (marketing / OM / CRM)	buildout.com			
Apto (Buildout)	apto.com			
ClientLook (LightBox)	clientlook.com			
Reonomy	reonomy.com			
CompStak	compstak.com			
Local commercial information exchange (CIE)				
County assessor / recorder / GIS (per county)				
ARGUS Enterprise (Altus Group)				
DocuSign	docusign.com			
Virtual data room (Dropbox, Box, other)				
Title / escrow order portal				
State real estate license portal (e.g. CA DRE eLicensing)				
LinkedIn / Sales Navigator	linkedin.com			
Google Business Profile	business.google.com			
QuickBooks Online (commissions / fees)	quickbooks.intuit.com			

Return this packet through a secure upload link, not by email.

Sign-off

Nothing here commits you to anything. Within two business days you get a one-page Client Brief and a fixed quote.

Client – name	Client title	Client signature	Client date

Everborn – name	Everborn title	Everborn signature	Everborn date
Chris Magee			