CLIENT INTAKE PACKET · FILLABLE

Land Acquisition Broker Intake Packet

Everything we need to build your landowner program, your developer buy-box matching, your LOI-to-close calendar 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)

Designated / principal broker (name and license number)

Year founded

Markets and submarkets you cover

Affiliation (independent, national CRE firm, land division of a larger firm)

Deal types you represent (seller / landowner, buyer / developer, both)

Company type

- ☐ Independent land brokerage
- ☐ Land group inside a commercial brokerage
- ☐ Multifamily land specialist
- ☐ Infill / urban land specialist
- ☐ Master-planned / residential lot specialist
- ☐ Industrial / commercial land specialist
- ☐ Farm and ranch land brokerage
- ☐ Other

Other:

Services and deal types you actively offer

- ☐ Landowner (seller) representation
- ☐ Developer / buyer acquisition representation
- ☐ Off-market sourcing for developers
- ☐ Assemblages
- ☐ Entitled land sales
- ☐ Raw / unentitled land sales
- ☐ Infill parcels
- ☐ Land for build-to-rent / single-family rental
- ☐ Broker opinions of value (BOVs)
- ☐ Entitlement consulting / coordination
- ☐ Ground leases
- ☐ 1031 replacement-property searches
- ☐ Joint-venture introductions (with counsel review)

Other:

Land deals closed per year (avg)

Average deal size (acres and price) and average fee

Average months from LOI to close

12-month closed-deal or fee goal

In one or two sentences, who is your ideal client – the landowner you want to represent or the developer you want to source for – 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 land broker / Associate broker / agent / Research analyst / Marketing coordinator / Transaction / closing coordinator / Executive assistant)	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?

- ☐ Relationship owner keeps every inquiry from their clients
- ☐ Round robin (by rule) for unassigned inquiries
- ☐ By market / submarket
- ☐ By property type or use
- ☐ Principal assigns manually
- ☐ Whoever grabs it first

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 template
- ☐ Past deal tombstones / case studies (client-approved)
- ☐ Market reports
- ☐ Aerials and parcel maps
- ☐ Pitch / listing presentation
- ☐ Existing landing pages

Other:

Google Business Profile link

Review links (Google Business Profile / LinkedIn company page / 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. 'Smith Land 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, OM and card.

Anything we must NEVER say or promise? (e.g. "approved for 300 units", "by-right", "easy rezone", price opinions in writing, "clean site", tax or 1031 outcomes, investor returns, 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				

CATEGORY	TOOL / VENDOR	WHO HOLDS THE LOGIN	MONTHLY COST	K / R / C / ?
Website host / builder				
CRM (Apto, Buildout, Salesforce, ClientLook, other)				
Market data (CoStar, Reonomy, other)				
Parcel and mapping (LightBox Vision / LandVision, Regrid, county GIS)				
Listing platforms (LoopNet, Crexi, LandWatch / Land.com)				
Marketing and OM builder (Buildout, other)				
Underwriting / pro forma (ARGUS Developer, ARGUS Enterprise, Excel)				
E-signature (DocuSign, other)				
Virtual data room (Dropbox, Box, Crexi / Buildout deal room)				
Email marketing (Buildout, Mailchimp, Constant Contact)				
Direct mail vendor				
Skip tracing / owner contact data (flag for consent review)				
LinkedIn / Sales Navigator				
Calendar / booking				
Aerial imagery (Nearmap, Google Earth Pro)				
Spreadsheets / deal 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
☐ Direct mail to landowners		☐ Cold calls to landowners (manual dialing)	
☐ Existing landowner relationships		☐ Developer / investor clients	
☐ Broker-to-broker referrals		☐ Attorney, CPA and estate-planner referrals	
☐ LoopNet inquiries		☐ Crexi inquiries	
☐ LandWatch / Land.com inquiries		☐ CoStar	
☐ Website / contact form		☐ LinkedIn	
☐ Signage on listed parcels		☐ Past clients (repeat)	
☐ Industry events (ULI, NAHB, local development groups)		☐ Other:	

Owner contact to listing / representation agreement %	Listing to LOI %	LOI to PSA %	PSA to closed %

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?

- ☐ Landowners who said "not now" never hear from us again
- ☐ Owner history lives in one broker's phone
- ☐ Developer buy boxes are out of date
- ☐ New parcels not matched to every buyer who fits
- ☐ PSA dates tracked in one spreadsheet
- ☐ Diligence documents chased by phone and email
- ☐ Sellers call weekly asking about entitlement status
- ☐ Closed deals never turned into case studies 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: New Lead → Contacted → Owner Meeting → Agreement Signed → Marketing / Buyer Matching → LOI → PSA Executed → Due Diligence / Feasibility → Entitlement → Deposit Hard → Closed
Side lanes: Landowner Long-Term (not selling yet) · Developer Buyer (active buy box) · On Hold (estate, partnership, litigation) · Lost / Went Elsewhere · 1031 In Progress

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 PSA date (feasibility end, deposit going hard, extensions, closing) in a system that alerts you today? ☐ Yes ☐ No

Do sellers get entitlement milestone updates automatically today? ☐ Yes ☐ No

Do you want a developer buy-box registry that matches every new parcel to the buyers it fits? ☐ 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 brokers
- ☐ Title and escrow officers
- ☐ Lenders and equity sources (for developer clients)
- ☐ Land-use / real estate attorneys
- ☐ 1031 qualified intermediaries
- ☐ Environmental and geotechnical consultants
- ☐ Civil engineers and planners
- ☐ CPAs and estate planners
- ☐ Surveyors

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 fees move only broker to broker, under a written referral agreement, paid through the brokerages. Attorneys, engineers, title, QIs, CPAs and lenders get a reporting-only lane (attribution and a recognition note, no fee); paying unlicensed people for real estate referrals is restricted in most states. Anything involving investors or capital raising 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 or representation agreement
- ☐ Agency / dual-representation disclosures required by the state
- ☐ Confidentiality agreements from buyers
- ☐ APN(s), legal description and vesting deed
- ☐ Title report / title commitment
- ☐ ALTA survey
- ☐ Phase I Environmental Site Assessment (ASTM E1527-21)
- ☐ Geotechnical report
- ☐ Zoning verification letter
- ☐ Utility will-serve letters
- ☐ Entitlement submittals and approvals
- ☐ Signed LOI and executed PSA with all amendments

Other:

How are documents collected today?

Avg. days to a complete file

Who chases missing items?

What happens after the sale today?

- ☐ Closing thank-you from the broker
- ☐ Referral ask to the seller (other owners they know)
- ☐ Anniversary check-in
- ☐ Client-approved case study / tombstone
- ☐ Buy-box refresh for the developer
- ☐ Nothing consistent
- ☐ Google review or private testimonial request
- ☐ Quarterly market note

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				☐
Landowner check-ins (calls, mail, email)				☐
Building owner call and mail lists				☐
Researching parcels and ownership				☐
Updating developer buy boxes				☐

RECURRING TASK	HOURS / MONTH	WHO DOES IT	PAIN (1-5)	AUTOMATE?
Matching new parcels to buyers				☐
Sending teasers and collecting confidentiality agreements				☐
Preparing OMs and BOVs				☐
Tracking LOIs and counters				☐
Tracking PSA dates and extensions				☐
Chasing diligence documents				☐
Entitlement status updates to sellers and buyers				☐
1031 date tracking with QIs				☐
Seller activity reports				☐
Writing case studies and tombstones				☐
CRM data entry and cleanup				☐
Scheduling tours and meetings				☐
Building reports for the principal				☐
Invoicing and chasing retainers or consulting fees				☐
Figuring co-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 dates in next 30 days)	☐			FULL	
Active Listings Activity Report (per seller)	☐			FULL	
LOI Log / Expiring LOIs	☐			FULL	
Due-Diligence Outstanding Items	☐			FULL	
Entitlement Milestone Status	☐			SEMI	
1031 Deadline Watch	☐			FULL	
Landowner Touch List (this week)	☐			FULL	
Developer Buy-Box Freshness	☐			FULL	
Parcel-to-Buyer Match Report	☐			SEMI	
Lead Source Report / Response Time	☐			FULL	
Pipeline Value by Stage	☐			FULL	

REPORT / RECURRING TASK	RUN IT?	WHERE IT COMES FROM TODAY	WHO PULLS IT	WE CAN MAKE IT	YOU WANT
Broker Scorecard	☐			FULL	
Fee Forecast (pending closings)	☐			SEMI	
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 owner call block, quarterly buy-box refresh, monthly seller reports, county recorder and planning-agenda checks, 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 land acquisition broker: Launch covers a sub-60-second reply on every listing-site inquiry, form and missed call, relationship-owner routing with a claim window, booking calendars, lead-source tagging, the closing review request and the compliance shell (brokerage name and license on everything, consent before any owner text, DNC checks); Growth adds the Parcel-to-Close Engine – the multi-year landowner cadence, the developer buy-box registry, CA-gated offering flow, LOI and PSA tracking, the contract-to-close calendar, the diligence document chase, entitlement milestone updates and the 1031 clock watch – plus onboarding, re-activation and the full Monday report; Full Engine adds broker-to-broker referral statements, reporting-only lanes for attorneys, engineers, title, QIs and CPAs, recruiting for analysts and junior brokers, and every operating-rhythm automation.

INCLUDED IN GROWTH AND FULL ENGINE

The Parcel-to-Close Engine

- Landowner Relationship Cadence: quarterly market notes and annual check-ins for every owner, for years, under the broker's name
- Developer Buy-Box Registry: every developer's criteria on file, refreshed quarterly, matched to every new parcel
- Confidentiality-Gated Offering Flow: teaser, e-signed CA, then the OM and data room, with open tracking
- LOI-to-PSA Tracker: every LOI logged with terms and expiry; PSA checklist for the attorneys
- Contract-to-Close Calendar: every PSA date back-solved from the effective date, with alerts to broker, client and title
- Due-Diligence Document Chase: title, ALTA, Phase I, geotech, zoning letter, will-serve letters – tracked until checked in
- Entitlement Milestone Broadcast: filing to final map, sent to seller, buyer and team
- 1031 Clock Watch: 45- and 180-day reminders for staff, never tax advice
- Closed-Deal Case Study and Referral Ask: client-approved tombstone and a referral ask to the seller

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	●	●	●
Review requests	At the right moment after the sale, sent to everyone, never filtered by sentiment	●	●	●

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
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 Parcel-to-Close Engine	Landowner Relationship Cadence; Developer Buy-Box Registry; Confidentiality-Gated Offering Flow; LOI-to-PSA Tracker; Contract-to-Close Calendar; Due-Diligence Document Chase; Entitlement Milestone Broadcast; 1031 Clock Watch; Closed-Deal Case Study 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 and consulting 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.	–	–	●
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**	
ONGOING -- BILLED MONTHLY			
☐	**Paid ad management**	**$800 / mo**	Ad spend billed direct to the platform

QUOTE IT?	ADD-ON	FEE	NOTE
☐	**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, LandWatch and website inquiry, under 60 seconds, under your brand [L]
- ☐ 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 calendars per broker for owner meetings and tours [L]
- ☐ Lead-source tagging so you know which channel produces listings and fees [L]
- ☐ After-hours AI assistant that confirms availability, collects developer criteria and books a call – never states zoning, price or tax outcomes [G]

LANDOWNERS

- ☐ Multi-year landowner cadence: quarterly market notes, annual check-ins, replies routed to the broker [G]
- ☐ Weekly owner call list built from the cadence with DNC checks (dialing stays manual) [G]
- ☐ Re-activation of your old owner list and past contacts (mail and email first; bounce-guarded) [G]
- ☐ Seller activity report per listing, monthly [G]
- ☐ Entitlement milestone updates to the seller [G]
- ☐ Client-approved case study and referral ask at closing [G]

DEVELOPERS & BUYERS

- ☐ Developer buy-box registry with quarterly refresh requests [G]
- ☐ Parcel-to-buyer matching with drafted outreach for broker approval [G]
- ☐ Teaser, e-signed confidentiality agreement, then OM and data room release [G]
- ☐ Call-for-offers and best-and-final deadline reminders [G]
- ☐ Per-broker landing pages and QR cards [G]
- ☐ Broker-to-broker referral program with written agreements and statements [F]

CONTRACT TO CLOSE

- ☐ LOI log with expiry alerts [G]
- ☐ Contract-to-close calendar back-solved from the PSA effective date [G]
- ☐ Diligence 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: PSA date within 5 days, LOI expiring, diligence overdue [F]

PARTNERS & GROWTH

- ☐ Reporting-only lanes for attorneys, engineers, title, QIs and CPAs [F]
- ☐ Partner outreach campaign to attorneys, CPAs and estate planners [F]
- ☐ Recruiting funnel for analysts and junior brokers [F]
- ☐ LinkedIn prospecting pipeline to developers [+]
- ☐ Partner prospect research (developer and owner lists) [+]
- ☐ Document set: OM, BOV and case-study 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 and consulting 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: commissions calculated from money actually collected, 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; brokerage name (and license number where required) in all advertising
- ☐ Agency and dual-representation disclosures per state
- ☐ Referral fees broker to broker only, in writing; no payments to unlicensed persons (e.g. California B&P 10137)
- ☐ TCPA: written consent before texting owners; no autodialed or prerecorded calls to cell phones without consent
- ☐ National and internal Do-Not-Call scrub for telephone solicitation of landowners
- ☐ CAN-SPAM footer and opt-out on developer and owner email
- ☐ RESPA: vacant-land and business-purpose loans generally exempt (12 CFR 1024.5); broker-to-broker fees expressly allowed (12 CFR 1024.14(g)) – confirm per deal with counsel
- ☐ Securities: no investor solicitation, return promises or transaction-based pay for capital raising without securities counsel sign-off (broker-dealer registration may apply)
- ☐ 1031: reminders only; no tax advice; QI holds funds
- ☐ Environmental: Phase I tracked by receipt only; no characterization of site condition
- ☐ Confidentiality: one client's deal terms never shown to another without written permission

Other: ____________

Is the team currently texting landowners, and do you have written consent from those owners?	☐ Yes	☐ No
Do you use skip-traced or purchased phone data for owner outreach?	☐ Yes	☐ No
Do you ever introduce investors or help developers raise capital?	☐ Yes	☐ No
Does anyone review OMs, mailers and emails 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
- ☐ Landowner touches completed
- ☐ Owner meetings booked
- ☐ Listings / representation agreements signed
- ☐ Parcels matched to buyers
- ☐ CAs signed and OMs opened
- ☐ LOIs issued and received
- ☐ PSAs executed
- ☐ Days LOI to close
- ☐ 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, notes, owners, developers, deals)
- ☐ Landowner list with parcel IDs and contact channels (CSV) and consent status
- ☐ Developer / investor client list with current criteria
- ☐ Active deal list with PSA effective dates and key dates
- ☐ Current OM, teaser, CA and LOI templates
- ☐ LoopNet, Crexi and LandWatch 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
- ☐ Logo files, headshots and approved case studies

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			
LandWatch / Land.com network	landwatch.com			
Reonomy	reonomy.com			
LightBox Vision (formerly LandVision)	lightboxre.com			
Regrid	regrid.com			
County GIS / assessor / recorder (per county)				
City / county planning and permit portal (e.g. Accela Citizen A				
FEMA Flood Map Service Center	msc.fema.gov			
ARGUS Developer / ARGUS Enterprise (Altus Group)				
Buildout (marketing / OM / CRM)	buildout.com			
Apto or other CRE CRM				
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			

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			