CLIENT INTAKE PACKET · FILLABLE

Real Estate Intake Packet

Everything we need to build your speed-to-lead front door, your contract-to-close board, your sphere program and your Monday team report. Snap Credit Fix, a California credit repair company, runs on a system I built for them.

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)

Licensed brokerage name (exactly as registered)

Brokerage license number

Team name (as it must appear under the brokerage)

Team lead / broker of record

Year the team started

State(s) licensed in

MLS(s) you belong to

Primary markets / farm areas

Company type

- ☐ Team inside a franchise brokerage
- ☐ Team inside an independent brokerage
- ☐ Independent brokerage (broker-owner)
- ☐ Expansion team / multi-market
- ☐ Solo agent with an assistant
- ☐ New-construction / builder sales team
- ☐ Luxury or relocation-focused team

Other:

Products / services you actively sell

- ☐ Buyer representation
- ☐ Listing / seller representation
- ☐ First-time buyers
- ☐ Luxury
- ☐ New construction
- ☐ Relocation
- ☐ Investors / 1031 exchanges
- ☐ Land / lots
- ☐ Condos / townhomes
- ☐ Short sales / distressed
- ☐ Probate / estate sales
- ☐ Leasing / rentals
- ☐ Property management
- ☐ Commercial

Other:

Closed sides per month (buyer + seller, avg)

Average sale price

Average days from first contact to closing

12-month sides / GCI goal

In one or two sentences, who is your ideal client and why do they choose your team over the other agents they could have called?

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 (Team lead / Listing agent / Buyer agent / ISA / Transaction coordinator (TC) / Showing assistant / Marketing / admin)	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?

- ☐ Whoever grabs it first
- ☐ Team lead assigns manually
- ☐ Round robin (by rule)
- ☐ ISA qualifies, then assigns
- ☐ By area / zip
- ☐ Each agent works only their own sphere and leads

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 files (team + brokerage, light and dark)
- ☐ Agent headshots
- ☐ Brokerage brand guide / advertising rules
- ☐ Listing photos and video tours
- ☐ Listing presentation / CMA templates
- ☐ Existing email signature
- ☐ Testimonials / review screenshots
- ☐ Buyer and seller guides

Other:

Google Business Profile link

Review links (Google Business Profile / Zillow / Realtor.com / Facebook)

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. '[Team Name] of [Brokerage Name] · Brokerage License #XXXXXXX · Equal Housing Opportunity') – paste it exactly

Paste your exact line; the brokerage name must appear as your state requires (usually larger than or ahead of the team name)

Anything we must NEVER say or promise in marketing (a "standard" commission rate, a guaranteed sale price or sell-in-X-days claim, neighborhood descriptions like "safe" or "good schools", "pocket listing")?

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 (RingCentral, Google Voice, brokerage phone app)				
Email hosting (Google Workspace, Microsoft 365)				
Domain registrar & DNS (GoDaddy, Namecheap, Squarespace)				
Website / IDX site (Real Geeks, Sierra, Luxury Presence, brokerage site)				

CATEGORY	TOOL / VENDOR	WHO HOLDS THE LOGIN	MONTHLY COST	K / R / C / ?
CRM (Follow Up Boss, BoldTrail / kvCORE, Lofty, Sierra)				
Transaction management (dotloop, SkySlope, Brokermint, Lone Wolf)				
E-signature (DocuSign, dotloop, Authentisign)				
MLS system (Flexmls, Matrix, Paragon)				
Showing service (ShowingTime, BrokerBay)				
Lockbox (Supra eKEY, SentriLock)				
CMA / market data (Cloud CMA, RPR)				
Portal lead programs (Zillow Premier Agent, Realtor.com, Homes.com)				
Calendar / booking (Google Calendar, Calendly)				
Email marketing / newsletters (Mailchimp, Constant Contact, CRM smart plans)				
Home-value / sphere tool (Homebot, RPR)				
Social scheduling & design (Canva, Meta Business Suite)				
Facebook / Instagram ads account (Special Ad Category)				
Google Ads account				
Review management (Google, Zillow, RealSatisfied)				
Spreadsheets / shared drives (Google Sheets, Excel, Dropbox)				
Other				

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

Do you already pay for an automation / CRM platform account of your own?

☐ 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
☐ Zillow (Premier Agent / Flex)		☐ Realtor.com	
☐ Homes.com		☐ Website / IDX registrations	
☐ Home-valuation page		☐ Google search / ads	
☐ Facebook / Instagram ads		☐ Sign calls	
☐ Open houses		☐ Sphere / past-client referrals	
☐ Agent-to-agent / relocation referrals		☐ Lender, builder or other partner referrals	
☐ Expireds / FSBOs		☐ Farming / circle prospecting / mailers	
☐ Organic social / video		☐ Other:	

Lead → appointment set %	Appointment met → buyer agreement or listing signed %	Signed → under contract %	Under contract → 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?

- ☐ Slow first response on portal leads
- ☐ No follow-up after 2-3 tries
- ☐ Leads live in an agent's phone
- ☐ Sphere and past clients never hear from us
- ☐ Past clients sold with another agent
- ☐ Lender, title and co-op chased by phone during escrow
- ☐ Sellers go quiet with no weekly update
- ☐ Buyers who aren't pre-approved yet go cold

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 → Attempted → Connected → Appointment Set → Appointment Met → Buyer Agreement Signed / Listing Signed → Under Contract → Closed
Side lanes: Nurture (24 months minimum for cold leads) · Not-Yet Buyer (not pre-approved yet) · Dead / Recycle · Past Client / Sphere (indefinite)

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

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

Does your state require a signed buyer agreement before the first tour? ☐ Yes ☐ No

Do your sellers get a weekly update automatically today? ☐ Yes ☐ No

Do you want a Not-Yet Buyer lane that introduces buyers to your lender and credit repair partner and keeps them in a 24-month nurture that brings them back to your team? ☐ 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 TYPE	HOW MANY ACTIVE	TOP 3 NAMES	HOW THEY SEND YOU BUSINESS TODAY	HOW YOU KEEP THEM UPDATED

Partner types

- ☐ Out-of-area agents / relocation companies
- ☐ Real estate attorneys
- ☐ CPAs / financial advisors
- ☐ Past clients
- ☐ Lenders / loan officers
- ☐ Home inspectors
- ☐ Builders
- ☐ Title and escrow
- ☐ Contractors / stagers
- ☐ Credit repair partner (Not-Yet Buyer lane)

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. Agent-to-agent referral fees are allowed when paid broker to broker under a written agreement. Lenders, title, escrow, attorneys, CPAs, contractors and past clients can be tracked, thanked and recognized, but never paid per referral (RESPA Section 8 and state license law); where a lender or title company co-markets with you, the cost-sharing is documented. We review this in week one.

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 buyer agreement
- ☐ Signed listing agreement and seller disclosures
- ☐ Pre-approval letter / proof of funds
- ☐ Earnest money receipt
- ☐ Inspection report and inspection response
- ☐ Appraisal
- ☐ Loan commitment
- ☐ Title commitment
- ☐ HOA documents
- ☐ Addenda and amendment signatures
- ☐ Final walkthrough sign-off
- ☐ Closing / settlement statement

Other:

How are documents collected today?

Avg. days to a complete file

Who chases missing items?

What happens after the sale today?

- ☐ Closing gift
- ☐ Home-anniversary touch
- ☐ Birthday / holiday touches
- ☐ Review request (Google / Zillow)
- ☐ Quarterly home-equity update
- ☐ Nothing consistent
- ☐ Referral ask at 45 days
- ☐ Monthly market update

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 portal and web leads				☐
Following up on leads who went quiet				☐
Assigning leads and checking who claimed them				☐

RECURRING TASK	HOURS / MONTH	WHO DOES IT	PAIN (1-5)	AUTOMATE?
Setting and confirming showings and listing appointments				☐
Getting buyer agreements signed before tours				☐
Chasing pre-approval letters / proof of funds				☐
Building contract-to-close deadline calendars				☐
Chasing documents and signatures during escrow				☐
Status updates to the lender, title and co-op agent				☐
Weekly seller updates				☐
Requesting showing feedback from buyer agents				☐
Sphere touches: birthdays, home anniversaries, check-ins				☐
Market and equity updates to past clients				☐
Review and referral asks after closing				☐
Social media posting and listing marketing				☐
Building reports for the team lead / broker				☐
Data entry between CRM, transaction tool and spreadsheets				☐
Database cleanup / duplicates				☐
Figuring team 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
Lead Source Report / Cost per Closing	☐			FULL	
Speed-to-Lead / Response Time by Agent	☐			FULL	
Agent Accountability Numbers (calls, appointments, agreements)	☐			FULL	
Pipeline Report (appointments to under contract)	☐			SEMI	
Under-Contract / Pending Report	☐			FULL	
Contract-to-Close Deadline Report	☐			FULL	
Missing Documents by File	☐			FULL	
Weekly Seller Report (per listing)	☐			SEMI	
Showing Feedback Summary	☐			FULL	

REPORT / RECURRING TASK	RUN IT?	WHERE IT COMES FROM TODAY	WHO PULLS IT	WE CAN MAKE IT	YOU WANT
Listing Inventory Review (DOM vs. area median)	☐			SEMI	
Closed Sides & GCI Report	☐			SEMI	
Sphere Touch / Database Health Report	☐			FULL	
Review & Referral Report	☐			FULL	
Partner Referral Report (Lane A / Lane B)	☐			FULL	
Agent Cap / Split Tracking	☐			ASSIST	
Brokerage File Compliance Review	☐			ASSIST	
	☐			--	
	☐			--	

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

Think: Monday pipeline meeting prep, listing-inventory review, under-contract review, MLS status updates, open-house scheduling, brokerage file submissions, license and CE renewals, new-agent onboarding.

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 systems we need to reach, and how you add us as a user (no shared logins), are on the **Systems** 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 real estate team: Launch covers a sub-60-second reply on every portal lead, form and missed call, round robin to the on-duty agent with a claim window, showing and listing-appointment calendars, the 5-day drip, the review request on the recorded close date, the brokerage-name and fair-housing compliance shell, and the daily recap and weekly funnel report; Growth adds the Contract-to-Close Engine (buyer agreement gate, deadline timeline, document chase, weekly seller report, showing feedback, sphere program, past-client sweep, review and referral ladder, milestone updates to lender, title and co-op, and the Not-Yet Buyer lane), long-term nurture, per-agent pages, the after-hours assistant, the full Monday report and the live dashboard; Full Engine adds the two-lane partner program (broker-to-broker referral fees in Lane A, recognition only in Lane B), printable partner materials, agent recruiting, the operating-rhythm automations and the monthly automation think-tank.

INCLUDED IN GROWTH AND FULL ENGINE

The Contract-to-Close Engine

- Buyer Agreement Gate: the buyer agreement goes out with the showing confirmation and the tour is not confirmed until it is signed, set to your state's rule
- Contract-to-Close Timeline: enter the executed date once and every deadline is back-solved, with alerts to the agent, TC and client
- Document and Signature Chase: one board showing what is missing per file, who owes it and how long it has been outstanding
- Weekly Seller Report: showings, feedback, portal views and days on market vs. area median, with the agent's comment
- Showing Feedback Loop: feedback requested from the buyer's agent within hours, answers dropped into the seller report
- Sphere Touch Program: monthly market touch, quarterly equity update, home anniversary and birthday, with reply detection
- Past-Client Re-Activation Sweep: the owned database segmented by years owned, equity and never-closed leads
- Review and Referral Ladder: review at close, referral ask at 45 days, closing-anniversary touch at 12 months
- Milestone Updates to Lender, Title and Co-op: standing status updates at each escrow milestone, exceptions escalated
- Not-Yet Buyer Lane: introduction to your lender and credit repair partner, then a 24-month nurture, no credit language

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; license 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 Contract-to-Close Engine	Buyer Agreement Gate; Contract-to-Close Timeline; Document and Signature Chase; Weekly Seller Report; Showing Feedback Loop; Sphere Touch Program; Past-Client Re-Activation Sweep; Review and Referral Ladder; Milestone Updates to Lender, Title and Co-op; Not-Yet Buyer Lane	–	●	●
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 agent.	–	●	●
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: team 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 license for your white-labeled workspace ($197 value) – one bill, no separate software vendor. $197 off the monthly if you already pay for the platform we build on. Ad spend and carrier fees billed at cost. Build fee half at signature, half on delivery. Month-to-month after the first 90 days. One-time add-ons bought with the build are 15% less than added later; monthly add-ons are not discounted. Regulated industries get a compliance review in week one at no charge. Your accounts, data and content are yours and export any time, and you keep the right to use the system we built even if you cancel. Our templates and methods stay ours, so no one can resell them. Agreements and invoices come from Everborn Marketing LLC dba Everborn Productions.

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
☐	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
☐	Additional campaign management	$400 / mo	
☐	Partner channel management	$600 / mo	
☐	Deliverability & compliance monitoring	$300 / mo	

QUOTE IT?	ADD-ON	FEE	NOTE
☐	**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`

SPEED TO LEAD

- ☐ Instant text + email to every portal, web and sign-call lead in under 60 seconds, under your brokerage name `[L]`
- ☐ Round robin to the on-duty agent with a claim window and automatic reassignment `[L]`
- ☐ Missed-call text-back with a booking link while you are showing or at a closing `[L]`
- ☐ Showing and listing-appointment booking calendars per agent, with confirmations and reminders `[L]`
- ☐ Lead-source tagging on every channel (Zillow, Realtor.com, Google, Meta, sign call, open house, sphere, referral) `[L]`
- ☐ After-hours AI assistant that answers listing questions, qualifies timeline, pre-approval and area, and books; it never quotes a commission rate and never describes a neighborhood `[G]`

FOLLOW-UP THAT NEVER FORGETS

- ☐ 5-day follow-up drip that stops the moment they reply or opt out `[L]`
- ☐ Long-term nurture: 24 months minimum for cold leads, indefinite for past clients, with reply detection that alerts the agent `[G]`
- ☐ Not-Yet Buyer lane: introduction to your lender and credit repair partner, then a nurture that brings them back to your team `[G]`
- ☐ Past-client re-activation sweep by years owned and equity, with appointments booked to the team calendar `[G]`
- ☐ Per-agent landing pages and QR cards with automatic attribution `[G]`

CONTRACT TO CLOSE

- ☐ Buyer Agreement Gate: agreement sent with the showing confirmation; tour confirmed only when it is signed `[G]`
- ☐ Contract-to-close timeline: every deadline back-solved from the executed date, with alerts to agent, TC and client `[G]`
- ☐ Document and signature chase board: what is missing per file, who owes it, how long `[G]`
- ☐ Milestone updates to the lender, title and co-op agent at each escrow milestone `[G]`
- ☐ Client onboarding on signing: welcome, what-happens-next, secure upload links and e-sign, with a wire-fraud warning in every escrow template `[G]`
- ☐ Integration with your transaction tool or MLS feed beyond the standard import `[+]`

LISTINGS & SELLERS

- ☐ Weekly seller report per listing: showings, feedback, views, days on market vs. area median, with your comment `[G]`
- ☐ Showing feedback requested from buyer agents within hours, answers dropped into the seller report `[G]`
- ☐ Price-conversation prompt when days on market crosses your threshold `[G]`
- ☐ Review request on the recorded close date (Google, Zillow), sent to every client `[L]`
- ☐ Referral ask at 45 days and closing-anniversary touch at 12 months `[G]`

SPHERE & PARTNERS

- ☐ Sphere touch program: monthly market touch, quarterly equity update, home anniversary, birthday `[G]`
- ☐ Lane A partner program: tracked links, referral agreements and monthly statements with fees owed, paid broker to broker `[F]`
- ☐ Lane B partner program for lenders, title, attorneys, CPAs and contractors: tracked links and recognition, no per-referral payment `[F]`
- ☐ Printable partner materials, version-numbered, with documented cost-sharing where a lender or title company co-markets `[F]`
- ☐ Partner outreach campaign to build the bench, with the no-fee copy for Lane B `[F]`
- ☐ Agent recruiting funnel with a first-30-days onboarding checklist `[F]`

COMMAND & CONTROL

- ☐ Daily recap and weekly funnel report to the team lead `[L]`
- ☐ Full Monday team report: leads by source, response times, appointments, agreements, under contract, closings, what got built `[G]`
- ☐ Live dashboard for the team lead `[G]`
- ☐ Compliance shell: brokerage name and license in every automated message, internal DNC, fair-housing blocklist, consent records `[L]`
- ☐ Monday pipeline meeting prep, daily accountability numbers per agent, listing and under-contract reviews `[F]`
- ☐ Internal alerts: unclaimed lead, stale pipeline, deadline at risk, no contact on active buyers `[F]`

- [ ] 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 agent – the agent's name, email and own sign-up link – so the file lands in that agent's queue; one message per client, never duplicates [G]
- [ ] Commission ledger for team splits: commissions calculated from money actually collected, using your own plan rules, with a monthly statement per agent 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?

- [ ] TCPA prior express written consent for marketing texts
- [ ] Opt-out by any reasonable means honored within 10 business days, across every channel
- [ ] National and internal Do-Not-Call scrub (FSBOs and expireds)
- [ ] Licensed brokerage name (and license number) on every ad, page and automated message
- [ ] Fair housing: no protected-class or proxy language in copy
- [ ] Meta housing ads in the Special Ad Category (no age, gender or lookalike targeting; 15-mile minimum radius)
- [ ] Written buyer agreement before touring, on your state's trigger
- [ ] Compensation always negotiable, never presented as standard
- [ ] RESPA Section 8: no payment to lender, title or escrow partners for referrals
- [ ] Agent-to-agent referral fees paid broker to broker, in writing
- [ ] Recorded-call disclosure
- [ ] Email CAN-SPAM opt-out

Other:

Is the team currently allowed to text leads and clients? ☐ Yes ☐ No

Do your forms capture written consent to text and call? ☐ Yes ☐ No

Does your broker of record review marketing before it goes out? ☐ Yes ☐ No

Are any Meta ads running today outside the Special Ad Category? ☐ 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

- [ ] Leads by source
- [ ] Speed to first response
- [ ] Appointments set / met
- [ ] Buyer agreements and listings signed
- [ ] Under contract / pending
- [ ] Closed sides and GCI
- [ ] Cost per closing by source
- [ ] Days on market vs. area median
- [ ] Repeat and past-client referral business
- [ ] Sphere touches completed
- [ ] Partner referrals (Lane A / Lane B)
- [ ] Reviews received

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.

- ☐ CRM admin login (or add us as a user) and lead-routing settings
- ☐ Website / IDX provider login (forms and lead routing)
- ☐ Past-client and sphere export (CSV with close date, address, purchase price, consent status)
- ☐ Facebook Business Manager + page admin
- ☐ Google Workspace / Microsoft 365 admin (branded email + calendars)
- ☐ Logo files, headshots and the brokerage brand guide
- ☐ Existing phone numbers to port or forward
- ☐ Portal lead-routing settings (Zillow, Realtor.com, Homes.com) so feeds can point at the new system
- ☐ Transaction management admin (dotloop / SkySlope) or a file export
- ☐ Google Business Profile manager access
- ☐ Google Ads / other ad accounts
- ☐ Domain registrar / DNS login
- ☐ Brokerage legal name, license number, EIN, address and website with privacy policy (required for business texting registration)
- ☐ Review-site links (Google, Zillow)

Anything else we should know before we start?

Systems, and how we get access

Where a system lets you add us as a user with our own login, you do that. Where it connects by sign-in, you sign in and click Allow. Anything else we set up live with you on a screen share.

SYSTEM	WEB ADDRESS	HOW WE GET ACCESS	WHO ON YOUR SIDE ADDS US
MLS (Flexmls, Matrix, Paragon, other)		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
CRM (Follow Up Boss, BoldTrail / kvCORE, Lofty, Sierr		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Zillow Premier Agent	premieragent.zillow.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Realtor.com agent account	realtor.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Homes.com agent account	homes.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
dotloop	dotloop.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
SkySlope	skyslope.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
ShowingTime	showingtime.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Lockbox app (Supra eKEY / SentriLock)	supraekey.com / sentrilock.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
DocuSign	docusign.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Website / IDX provider admin		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Brokerage intranet / back office		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
State real estate license portal		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Google Business Profile	business.google.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Meta Business Suite (ads + page)	business.facebook.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Google Ads	ads.google.com	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Google Workspace / Microsoft 365 admin	admin.google.com / admin.micros	☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
Domain registrar / DNS		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	
		☐ Adds us as a user ☐ Sign in + Allow ☐ Set up live together	

We never ask for or store passwords.
You stay in control and can remove our access at any time.

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

Your agreement and invoices come from Everborn Marketing LLC dba Everborn Productions.

Everborn – name	Everborn title	Everborn signature	Everborn date
Chris Magee			