

CLIENT INTAKE PACKET · FILLABLE

Tell us how your business runs.

Real Estate

Everything we need to build the system to how you actually sell. Fill in what you know; leave blank what you don't. Anything left blank is a question for the intake call, not an assumption we'll invent.

About two hours in week one. The builder reads every line, and the fields feed the variable sheet the build runs from.

BEFORE WE START

Which package, and who we are dealing with.

Launch

\$3,500 + \$697/mo

Every lead answered fast

Growth

\$6,500 + \$1,197/moPlus The Contract-to-Close
Engine

Full Engine

\$9,500 + \$1,697/mo

Plus partners and the think-tank

Your name

Title

Email

Cell

Business name

Website

Date

Referred by (rep or partner, if any)

☐ We already own our own HighLevel account☐ Regulated industry: book the week-one
compliance review☐ Domain, business email and phone already exist☐ Starting from zero: set up domain, email and
phone

How to use this packet

Type directly into the boxes and save, or print and write. Checkboxes mark what is true today. The last page is the sign-off that confirms what we'll build. Nothing in this packet asks for passwords, account numbers, or anyone's personal identifiers — we never collect those by form or email.

SECTION 1 OF 12 The team

The basics about the team and brokerage so every page, footer and message carries the right names. State advertising rules require the brokerage name to appear larger than or ahead of the team name.

Licensed brokerage name and license number

Team name as it must appear under the brokerage

State(s) and MLS(s)

Sides last 12 months

Buyer and seller sides combined. A round number is fine.

Team lead, agents, ISA, TC

Names and roles. ISA is the inside sales person who calls leads; TC is the transaction coordinator.

☐ Team name is subordinate to the brokerage name ☐ Equal Housing Opportunity mark on hand

SECTION 2 OF 12 Agents

List every agent who takes leads. We use this for the round-robin, booking calendars and per-agent pages. The claim window is how long an agent has to accept a new lead before it rolls to the next person.

Agents – name, license number, cell and email, one per line

Round-robin order and on-duty schedule

Who is up when. If nobody is on duty, leads wait for the next shift.

Claim window in minutes

How long one person has to grab a new lead before it moves to the next person in line. 5 is typical.

☐ Each agent has a booking calendar ☐ Each agent approves their per-agent page copy

SECTION 3 OF 12 Existing systems

The software you already run. We decide with you whether to build inside your current CRM or alongside it, and we connect the portal lead feeds either way.

Current CRM (Follow Up Boss, kvCORE, Lofty, Sierra, other)

Transaction management tool

E-sign tool

Showing tool (ShowingTime, other)

☐ Build inside the existing CRM or alongside it (decision recorded)

☐ Portal lead feeds identified

SECTION 4 OF 12 Lead sources

Where leads come from and roughly what each source costs. Every lead gets a source tag so the report can show cost per closing. Housing ads on Meta have to run under the Special Ad Category.

Zillow, Realtor.com, Homes.com spend and lead volume

Google and Meta spend

Sign calls and open houses per month

Sphere and agent referral volume

☐ Source tag list confirmed

☐ Meta ads declared in the Special Ad Category

SECTION 5 OF 12 Pipeline and state rules

We ship a standard set of stages you can rename. This section also captures your state's buyer-agreement rule so the system will not book a tour or send advice before the agreement is signed.

Confirm or rename each stage**When your state requires a signed buyer agreement**

Before the first tour, before giving advice, or before writing an offer. Check with your broker if unsure.

☐ State advertising rule read before any automated message goes out

Buyer agreement maximum term, if the state sets one

Some states cap it at 3 or 6 months. Write 'none' if yours does not.

☐ Buyer Agreement Gate configured to the state

SECTION 6 OF 12 Contract-to-close

Once a deal goes under contract the system tracks each deadline and updates the parties. Tell us your usual contingency periods and who gets called when a deadline slips.

Standard contingency periods by contract type

Inspection, appraisal, financing and so on, in days, for financed and cash deals.

Parties to update at each milestone**Escalation contact when a deadline passes**

☐ Deadline list reviewed by the TC

☐ Wire-fraud warning included in escrow templates

SECTION 7 OF 12 Listings

How you keep sellers informed. The seller report goes out automatically on the day you pick, and the system asks for showing feedback on your schedule.

Seller report day**DOM threshold for the price conversation**

Days on market before the system reminds the agent to talk price with the seller. 14 or 21 is common.

Feedback request timing after showings☐ Seller report copy approved☐ No neighborhood characterization in any template**SECTION 8 OF 12** Database

Your past clients and sphere are the cheapest business you will ever get. Tell us where the list is, what it has in it and whether those people agreed to be contacted, so we know which channels we can use.

Past-client and sphere list size**Fields available: close date, years owned, purchase price****Consent status of the list**

Did these people opt in to texts? If you are not sure, say so and we start with email and calls.

☐ Internal DNC list loaded☐ Consent evidence exists for texting the list

SECTION 9 OF 12 Partners

Two kinds of partner. Lane A is other agents who send you clients for a broker-to-broker referral fee. Lane B is lenders, title, attorneys and contractors who get recognition and a monthly status report but never a payment per referral.

Lane A – out-of-area agents, relocation contacts and fee %

Name, brokerage, market and the referral percentage in your written agreement. One per line.

Lane B: lenders, title, attorneys, CPAs, contractors

Preferred lender and credit repair partner for the Not-Yet lane

Who buyers go to when they cannot qualify yet. We route them there and bring them back when ready.

☐ Lane A fees are broker to broker and in a written agreement

☐ Lane B receives recognition only, never a per-referral payment

☐ Cost-sharing documented where a lender or title company co-markets

SECTION 10 OF 12 Compliance

Who at the brokerage approves templates and how we keep the outreach clean. The fair-housing blocklist is already loaded; add any words your broker wants stopped as well.

Broker of record for template approval

Fair-housing blocklist additions

DNC scrub provider

The service that checks numbers against the Do Not Call list before calls go out. Write 'none' and we will recommend one.

☐ Compliance review booked in week one

☐ STOP honored within 10 business days across all channels

☐ No cold-texting to purchased lists

SECTION 11 OF 12 Phone and texting

What we need to set up your tracked number and register it for texting. Paste the consent wording from your forms exactly, because the registration has to match it.

Tracked number**Privacy policy URL****Consent checkbox wording on each form**

The sentence next to the checkbox. Paste it as-is from each form.

☐ A2P sample messages match the form's consent language

☐ Client submits the registration; we prepare it

SECTION 12 OF 12 Reporting

When the team meets, who gets the owner's report and which numbers you hold each agent to.

Monday meeting time**Owner's report recipients****Accountability numbers wanted per agent**

For example: calls made, appointments set, agreements signed, closings.

☐ Cost per closing by source is wanted

☐ Dashboard viewers named

THE NEVER-LIST FOR RESIDENTIAL REAL ESTATE

What our automations will never say.

Tick each line to confirm you've read it. These are the rules every template is checked against before it goes live.

- ☐ Any reference to a protected class or a proxy for one: perfect for a young family, empty nesters, safe neighborhood, good schools, quiet area, no Section 8.
- ☐ Age, gender or familial-status targeting, lookalike audiences, or a sub-15-mile radius on Meta housing ads.
- ☐ Any compensation-based ranking, filtering or steering language.
- ☐ Any statement that a commission rate is standard, typical or set. Commission is negotiable, always.
- ☐ Guaranteed sale-price or sell-in-X-days-or-free claims unless the brokerage has that program documented.
- ☐ Any fee-for-referral offer to a lender, title, escrow or home warranty partner.
- ☐ A text to a number that opted out or was never scrubbed against DNC.
- ☐ Any automated message missing the licensed brokerage name.
- ☐ Pocket listing. Say office exclusive or delayed marketing.

ANYTHING ELSE

What we didn't ask.

The three tasks eating the most time each week**What a great first 90 days looks like****Tools we already pay for (and which ones we actually use)****Anything else we should know**

SIGN-OFF

This is what we'll build.

By signing you confirm the package chosen on page 1, that the information in this packet is accurate to the best of your knowledge, and that every automated template will be reviewed by your compliance contact before it goes live.

Signature**Date****Printed name****Title****What happens next**

Within two business days you get a one-page brief and a fixed quote. Week one is intake and foundation; week four is handoff. everbornproductions@gmail.com · (916) 541-3415.