

WHAT YOU ARE GETTING

The build, itemized.

Real Estate

Not a feature brochure. Every line below is something that exists and works when the four weeks are done, and that you can open in your own account and see.

Each package is cumulative. Growth includes all of Launch. Full Engine includes all of Growth. The prices are the same in every industry; what is inside them is built for residential real estate.

Launch

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

BUILD FEE

\$3,500

one time

MONTHLY

\$697

includes the platform

DELIVERED

- **Tracked number, domain and email.** A tracked local number, your domain and professional email on your own identity, with call routing and recording.
- **Pipelines in your team's language.** CRM pipelines and stages named the way your team actually talks.
- **Lead capture with written consent.** A lead-capture page and forms that record written consent to call and text, with a privacy link, on every entry point.
- **Reply in under 60 seconds.** A reply to every new inquiry in under 60 seconds, by text and email, that stops the moment they answer.
- **Round-robin with a claim window.** Round-robin assignment with a claim window and automatic reassignment, so no lead sits with someone who is off.
- **Missed-call text-back.** Missed-call text-back with a booking link.
- **Booking calendars.** Booking calendars per person with confirmation and reminder sequences.
- **5-day follow-up drip.** A 5-day follow-up drip that stops instantly on any reply or opt-out.
- **Lead-source tagging.** Lead-source tagging at entry on every channel, so cost per sale by source is measurable from day one.
- **Review requests.** A review request at the right moment after the sale or visit, sent to everyone, never filtered by sentiment.
- **Business texting registration.** A2P 10DLC brand and campaign registration prepared with sample messages that match your consent language.
- **Compliance shell.** Consent records with timestamps, STOP and any-reasonable-means opt-outs honored across every channel and workflow, quiet hours, the required footers and identifiers, and a blocked-phrase list applied to every template.
- **Daily recap and weekly funnel report.** Daily recap and a weekly funnel report to the owner.
- **Handoff booklet and training.** A handoff booklet with screenshots of every system, and team training.

BUILT FOR RESIDENTIAL REAL ESTATE

PIPELINE STAGES

New Lead → Attempted → Connected → Appointment Set → Appointment Met → Buyer Agreement Signed / Listing Signed → Under Contract → Closed → Nurture → Dead / Recycle

- **Pipeline stages as agents think:** New Lead, Attempted, Connected, Appointment Set, Appointment Met, Buyer Agreement Signed / Listing Signed, Under Contract, Closed, with separate Nurture and Dead/Recycle lanes.
- Home-valuation and property-inquiry landing pages with a TCPA consent checkbox and privacy link.
- Showing and listing-appointment calendars with confirmation and reminder sequences.
- **Source tags:** Zillow, Realtor.com, Google, Meta, sign call, open house, sphere, agent referral.
- Review request fires on the recorded close date to Google and Zillow.
- A2P 10DLC registration with real-estate sample messages; the form's consent checkbox, privacy policy and sample messages must match or the campaign is rejected.
- Compliance shell adds the licensed brokerage name and license number in every automated message, an internal DNC list, and a fair-housing word blocklist on outbound copy.

Growth

Everything in Launch, plus onboarding, retention, database re-activation, the full Monday report and your industry engine. The package most businesses land on.

BUILD FEE

\$6,500

one time

MONTHLY

\$1,197

includes the platform

DELIVERED — EVERYTHING IN LAUNCH, PLUS

- **Branded email templates.** Branded email templates with your identifiers locked in.
- **Client onboarding.** Client onboarding on “Sold”: welcome, what-happens-next, document request with secure upload links, e-sign, payment link. Never asks for sensitive data by email reply.
- **Invoicing and payment links.** Invoicing and payment links with reminders until paid.
- **Document and signature chase.** Document and signature chase with a live staff checklist showing who owes what and how long it has been outstanding.
- **Long-term nurture.** Long-term nurture sized to your buying cycle, kept separate from the 5-day drip, with a re-engagement detector that moves anyone who responds back to the front of the pipeline with an alert.
- **Owned-list re-activation.** Owned-list re-activation: a ramped, bounce-guarded campaign against every old lead and past customer you already paid for.
- **Retention program.** A retention program for existing customers: anniversaries, check-ins, renewals, and the save flow when someone tries to leave.
- **Per-rep pages and QR cards.** Per-rep landing pages and QR cards, each feeding the same pipeline with attribution to the rep.
- **After-hours AI assistant.** An after-hours AI assistant that answers, qualifies and books, fenced by your industry’s never-list.
- **Full weekly owner’s report.** The full weekly owner’s report, written as what the business accomplished, never a task log.
- **Live dashboard and command center.** A live dashboard and an owner’s command center: one screen instead of four logins, showing this week’s recurring tasks with tick-off, a green, amber or red light on every system, the documents and logins in one place, and a fix-it runbook for when something breaks.
- Long-term nurture is indefinite for anyone who has closed, and a minimum of 24 months for a cold buyer or seller lead.
- The after-hours AI assistant answers listing questions, qualifies timeline, pre-approval and area, and books, with a hard rule never to quote a commission rate as standard and never to characterize a neighborhood.

YOUR INDUSTRY ENGINE · INCLUDED IN GROWTH

The Contract-to-Close Engine

Escrow that runs itself and a sphere that never goes quiet

Buyer Agreement Gate

The buyer rep agreement goes out with the showing confirmation, e-sign is tracked, and the tour will not confirm as ready until it is back. The state's own trigger rule is configured (before tour, before substantive advice, or before offer), and a copy attaches to the contact record.

Document and Signature Chase

One board showing every open file, exactly what is missing per file, who owes it, and how long it has been outstanding. Automatic reminders go to the client, the co-op agent, the lender and title until the item is checked in.

Showing Feedback Loop

A feedback request goes to the buyer's agent within hours of every showing; responses drop straight into the seller report. Nobody chases co-op agents.

Past-Client Re-Activation Sweep

A one-time sweep of the owned database segmented by years owned (the 7-to-11-year band is where the sellers are), by equity position, and by past-lead-never-closed, with a distinct message per segment and appointments booked into the team calendar.

Milestone Updates to Lender, Title and Co-op

Standing status updates go to all parties at each escrow milestone; exceptions escalate to a person. This is the coordination the TC currently does by phone.

Contract-to-Close Timeline

Enter the executed date once. The system back-solves every deadline: inspection period end, inspection response, appraisal ordered and received, loan commitment, title commitment, HOA docs, final walkthrough, closing. It alerts the agent, the TC and the client ahead of each one and escalates if a date passes unchecked.

Weekly Seller Report

Auto-assembled per active listing: showings this week, feedback received, portal views, days on market against the area median, and a price-position note. It emails to the seller with the agent's comment field, and prompts the price conversation when DOM crosses a threshold.

Sphere Touch Program

Every past client and sphere contact on a perpetual cadence: monthly market touch, quarterly home-equity update, home anniversary, birthday. Reply detection flags a live seller conversation to the agent instead of continuing the drip.

Review and Referral Ladder

Review request at close, referral ask at 45 days, closing-anniversary touch at 12 months, each with a per-agent page and QR card the agent can hand over in person.

Not-Yet Buyer Lane

A buyer who cannot get pre-approved yet is tagged Not Yet by the agent, gets an introduction to the team's lender partner and credit repair partner, and sits in the 24-month nurture so they come back to this team when they are ready. No credit language in any automated message.

Full Engine

Everything in Growth, plus the referral-partner program, full operations, and a monthly think-tank that keeps finding the next thing to take off your team's plate.

BUILD FEE

\$9,500

one time

MONTHLY

\$1,697

includes the platform

DELIVERED – EVERYTHING IN GROWTH, PLUS

- **Referral partner program.** A referral partner program with a tracked link and printed QR card per partner and automatic attribution written at lead creation.
- **Printable partner materials.** Printable partner materials: welcome packet, counter cards, one-pagers, version-numbered.
- **Monthly partner statements.** Automated monthly partner statements, with contents set by what the law allows in your industry. Where a threshold decides what appears on a statement, the system records the decision and never the figure behind it, so the sheet stays safe to share with staff.
- **Partner outreach campaign.** A partner outreach campaign to build the bench, with a no-fee copy variant wherever a fee is illegal.
- **Partner lanes.** Partner lanes: a separate pipeline and cadence per partner type.
- **Operating-rhythm automations.** Every operating-rhythm automation from the intake: huddle prep, daily lists, weekly reviews, monthly reports.
- **Internal task and alert flows.** Internal task and alert flows: unclaimed lead, stalled file, deadline at risk, negative review, manager escalation.
- **Written procedures.** Written procedures for the team's own operations.
- **Priority support.** Priority support: a named contact, a weekly twenty-minute call, same-day changes.
- **Monthly business report.** Monthly business report in addition to the weekly.
- **Handoff booklet, kept current.** The handoff booklet, kept current as the system changes.
- **Monthly automation think-tank.** A standing session every month where we sit down with you and your team, find the daily tasks eating their time, and design and build custom automations for them.

THE PART NOBODY ELSE SELLS

Monthly automation think-tank

A standing session every month where we sit down with you and your team, find the daily tasks that are eating their time, and design and build custom automations for them. Every build is documented and added to your handoff booklet. It is the reason Full Engine clients stay for years: the system keeps getting better instead of slowly going stale.

FULL ENGINE, BUILT FOR RESIDENTIAL REAL ESTATE

Partners, lanes and rhythm in your business.

- Two-lane partner program, built as separate pipelines with separate templates so the compensation logic can never cross.
- **Lane A, licensee partners (out-of-area agents, relocation):** tracked links, attribution, auto-generated referral agreements, and monthly partner statements that carry money: referrals sent, deals closed and fees owed at the agreed 25-40% of GCI, paid broker to broker.
- Lane B, everyone else (lenders, title, attorneys, CPAs, contractors, past clients): tracked links, attribution and a recognition leaderboard. Reporting only, no per-referral payment. Lender and title partners are RESPA-covered; unlicensed civilians cannot be paid a real estate referral fee in essentially every state.
- **Lane B is a separate program, not a flag on Lane A:** its own workbook, sign-up form and outreach sheet, with no tier, rate, owed, W-9, payment or 1099 column anywhere in them and an instruction on the sheet that none may be added. A column that does not exist cannot be filled in by a helpful staff member, and the copy states the no-fee position plainly in both directions, because the lender or title partner asking is the one thinking about RESPA Section 8 and state license law.
- Printable partner materials with documented cost-sharing wherever a settlement-service provider participates.
- **Recruiting funnel:** yes, for agents joining the team, with a first-30-days onboarding checklist.
- **Operating-rhythm automations:** Monday pipeline meeting prep, daily accountability numbers per agent, listing-inventory review, under-contract review.
- **Internal alerts:** unclaimed lead, stale pipeline, deadline at risk, no contact in X days on active buyers.

TERMS

The fine print, in plain words.

- **Same three packages, same prices, every industry.** What changes is what goes inside them for residential real estate.
- Each monthly fee includes a **\$197 platform licence** for your white-labeled workspace. One bill, no separate software vendor. If you already own your own HighLevel account, take \$197 off the monthly and we build in yours.
- **Ad spend and carrier messaging fees are billed at cost.** We don't mark them up.
- The **build fee is half at signature, half on delivery.**
- **Month to month after the first 90 days.** No long contract.
- **Add-ons bought with the build are 15% less** than the same add-on later.
- **Regulated industries get a compliance review in week one at no charge.** Every template goes to your compliance officer or counsel before it goes live. We build the system and the evidence file; we do not give legal advice.
- **You own everything** — accounts, data, scripts and documents. Your contacts, pipelines, templates and documents export at any time, and the domain and sheets are registered in your name.

What we ask of you

About two hours for intake in week one, a thirty-minute review each week during the build, and one hour at handoff. After that, the only thing the system needs from your team is that they answer the leads it hands them. That one is not optional, and it is the single biggest difference between clients who get results and clients who don't.

Proof

Snap Credit Fix, a California credit repair company in one of the most regulated categories there is, runs on a system I built for them: leads answered in under a minute and assigned round-robin, a 52-week nurture, a re-activation campaign across roughly 40,000 past leads, a dealer referral program with printed QR counter cards and automated monthly statements, and a Monday report the president reads first. If it passes there, it passes in yours.