CLIENT INTAKE PACKET · FILLABLE

Residential Brokerage Intake Packet

Everything we need to build your recruiting pipeline, agent onboarding and retention, your compliance review queue, office lead routing and your Monday broker's report – 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)

Broker of record / designated broker (name and license number)

Managing brokers by office

Franchise or independent (franchise brand, if any)

Year founded

MLS(s) and association(s)

Affiliated businesses owned (mortgage, title, escrow, insurance), if any

Company type

- ☐ Independent brokerage
- ☐ Franchise office
- ☐ Multi-office regional brokerage
- ☐ Cloud / virtual brokerage
- ☐ 100% commission / flat-fee model
- ☐ Boutique / luxury brokerage
- ☐ Brokerage with in-house mortgage / title JV
- ☐ Other

Other:

Services your brokerage offers

- ☐ Buyer representation
- ☐ Seller representation
- ☐ New construction / builder services
- ☐ Relocation
- ☐ Luxury
- ☐ Property management
- ☐ Leasing / rentals
- ☐ Small multifamily and investment property
- ☐ Referral-only agents (referral company)
- ☐ Agent mentoring / coaching program
- ☐ Company-generated lead program
- ☐ In-house transaction coordination
- ☐ Marketing services for agents
- ☐ Mortgage / title / escrow (affiliated)

Other:

Agent count today (and 12 months ago)

Transactions and volume last 12 months

Agents joined and agents departed last 12 months

12-month agent-count or company-dollar goal

In one or two sentences, who is your ideal agent to recruit and keep, and why do they choose your brokerage over the office down the street?

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 (Broker-owner / Designated broker / broker of record / Managing broker (per office) / Recruiter / director of growth / Compliance / file reviewer / Transaction coordinator / Office manager / administrator)	LICENSE / ID # (IF ANY)	EMAIL	CELL	GETS LEADS?
					☐
					☐
					☐
					☐
					☐
					☐

NAME	ROLE (Broker-owner / Designated broker / broker of record / Managing broker (per office) / Recruiter / director of growth / Compliance / file reviewer / Transaction coordinator / Office manager / administrator)	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?

☐ Office leads go to opted-in agents in rotation
☐ By area / zip or price point
☐ By language
☐ Floor / duty schedule
☐ Managing broker assigns manually
☐ Company leads go to teams only

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) and brand guide
☐ Recruiting presentation / value proposition
☐ Commission plan summary (for broker use only)
☐ Agent headshots
☐ Office photos and culture video
☐ Agent testimonials (consented)
☐ Listing presentation template
☐ Existing landing pages

Other:

Google Business Profile link

Review links (Google Business Profile (each office) / Zillow (agent and brokerage profiles) / Realtor.com / Yelp / Facebook / Glassdoor / Indeed (for recruiting))

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. 'Main Street Realty, Inc. – CA DRE #01234567 – Equal Housing Opportunity') – paste it exactly

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

Anything we must NEVER say or promise? (e.g. "standard commission", "6%", neighborhood characterizations, "cap in your first year", income promises to recruits, "passive income" from revenue share, "pocket listing", a team name without the brokerage name)

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 (office lines, agent cells)				
Email hosting (Google Workspace / Microsoft 365)				
Domain registrar & DNS				
Website / IDX (BoldTrail, Real Geeks, Sierra, other)				
Consumer CRM (BoldTrail / kvCORE, Follow Up Boss, Lofty, other)				
Recruiting CRM (BrokerKit, spreadsheet, other)				
Transaction management (dotloop, SkySlope, Lone Wolf Transactions)				
Back office / commission accounting (Lone Wolf Back Office, BoldTrail BackOffice, Loft47)				
General accounting (QuickBooks, other)				
MLS system(s)				
Showing service (ShowingTime, other)				
Lockbox (Supra, SentriLock)				
E-signature				
Training / LMS				
Calendar / booking				
Review management				
Facebook / Instagram ads and Google Ads accounts				
Portal lead programs (Zillow, Realtor.com, Homes.com)				
Marketing design (Canva, brokerage marketing center)				
Spreadsheets / shared drives				
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
☐ Company website / IDX		☐ Sign calls	
☐ Zillow		☐ Realtor.com	
☐ Homes.com		☐ Relocation companies	
☐ Open houses		☐ Past-client referrals (company clients)	
☐ Google search / ads		☐ Facebook / Instagram ads	
☐ Builder / new-construction partners		☐ Out-of-area agent referrals	

SOURCE	PER MONTH	SOURCE	PER MONTH
☐ Recruits: agent referrals		☐ Recruits: license lists and outreach	
☐ Recruits: career nights and inbound inquiries		☐ Other:	

Office lead to appointment %	Appointment to signed agreement %	Recruit contacted to meeting %	Recruit meeting to signed ICA %

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?

- ☐ Recruits go cold after the first coffee
- ☐ New agents take months to a first deal
- ☐ We find out an agent is leaving when the transfer arrives
- ☐ Office leads unworked by the agent who claimed them
- ☐ Files close with missing documents or late review
- ☐ License, E&O or dues lapses discovered late
- ☐ Agent advertising goes out without approval
- ☐ Past company clients never hear from the brokerage

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: Agents: Prospect Agent → Contacted → Meeting Set → Met → Offer Presented → Agreement Signed → Onboarding → Active
Office leads: New Lead → Routed → Claimed → Contacted → Appointment Set → Agreement Signed → Under Contract → Closed → Past Client
Side lanes: At Risk (agent) · Departed / Alumni (agent) · Not Now (recruit, revisit at cap anniversary) · Lead Nurture (consumer) · Dead / Recycle (consumer)

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 run a recruiting follow-up cadence today, beyond the first meeting?	☐ Yes	☐ No
Does every transaction file go through a review queue before it can close?	☐ Yes	☐ No
Do you want a retention radar that flags agents with no activity, missed trainings or an upcoming cap anniversary?	☐ 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-area brokerages
- ☐ Relocation companies
- ☐ Lenders
- ☐ Title and escrow companies
- ☐ Home warranty companies
- ☐ Inspectors
- ☐ Insurance agents
- ☐ Builders
- ☐ Affiliated businesses (mortgage, title, escrow JV)
- ☐ Past clients

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.** RESPA Section 8 allows referral fees between real estate brokers and agents (broker to broker, under a written agreement), but forbids anything of value to lenders, title, escrow, home warranty or other settlement-service providers for referrals; affiliated businesses need the affiliated-business disclosure. Those partners get a reporting-only lane (attribution and recognition, no fee), and paying unlicensed people for referrals is restricted by state law.

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 independent-contractor agreement
- ☐ License transfer to the brokerage
- ☐ MLS and association transfer / activation
- ☐ Lockbox key activation
- ☐ E&O enrollment
- ☐ W-9 and direct-deposit form
- ☐ Signed policy and procedures manual acknowledgment
- ☐ Headshot and bio
- ☐ Tech account setup (CRM, transaction management, email)
- ☐ Business card and sign order
- ☐ Training schedule acknowledgment
- ☐ Transaction documents missing from files (ongoing)

Other:

How are documents collected today?

Avg. days to a complete file

Who chases missing items?

What happens after the sale today?

- ☐ Welcome announcement (with consent)
- ☐ Onboarding runway checklist
- ☐ Mentor assignment
- ☐ First-deal recognition
- ☐ 30/60/90-day check-ins with the broker
- ☐ Cap and anniversary recognition
- ☐ Quarterly business-plan review
- ☐ Nothing consistent

Past customers in your database (#)

Last time they all heard from you

% of business from repeat / referral

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

9. Monthly Time Audit

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

RECURRING TASK	HOURS / MONTH	WHO DOES IT	PAIN (1-5)	AUTOMATE?
Recruiting follow-up and coffees				☐
Onboarding new agents				☐
Routing office leads and checking they were worked				☐
Reviewing transaction files				☐
Chasing agents for missing documents and signatures				☐
Approving agent advertising				☐
Tracking caps and answering "where am I on my cap?"				☐
Agent commission statements				☐
License, CE, dues and E&O deadline tracking				☐
Agent check-ins and retention conversations				☐
Training and office meetings				☐
Monday broker meeting prep				☐
Recognition posts and announcements				☐
Past-client marketing for company clients				☐
Review requests				☐
Answering agent questions (policies, forms, tech)				☐
Data entry between CRM, transaction and back-office systems				☐
Exit paperwork and pending-file referral agreements				☐
Chasing unpaid agent fees (desk, transaction, E&O)				☐
				☐
				☐

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
Agent Roster and Count (joins / departures)	☐			FULL	
Recruiting Pipeline Report	☐			FULL	

REPORT / RECURRING TASK	RUN IT?	WHERE IT COMES FROM TODAY	WHO PULLS IT	WE CAN MAKE IT	YOU WANT
Onboarding Status by New Agent	☐			FULL	
Retention Radar (at-risk agents)	☐			SEMI	
Compliance Review Queue / Aging	☐			FULL	
Transactions Opened, Pending, Closed	☐			FULL	
Agent Production Board	☐			FULL	
Cap Tracker / Company Dollar YTD	☐			SEMI	
Office Lead Program: Routing, Claim and Conversion	☐			FULL	
Lead Source Report / Response Time	☐			FULL	
License, CE, Dues and E&O Expirations	☐			FULL	
Advertising Approval Log	☐			FULL	
Review / Reputation Report	☐			SEMI	
Monthly Agent Statements	☐			SEMI	
Marketing Compliance Log (consents, opt-outs, templates)	☐			FULL	
Trust / Escrow Deposit Log inputs	☐			ASSIST	
Agent fees overdue	☐			FULL	
Billing reconciliation (agent fees)	☐			FULL	
	☐			--	
	☐			--	

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

Think: Monday broker meeting, weekly file-review block, monthly agent statements, cap anniversaries, quarterly business-plan reviews, license and E&O renewals, association dues cycles, annual policy manual update, career nights.

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 residential brokerage: Launch covers office-lead routing with a claim window and reassignment, a sub-60-second reply on every company lead and missed call, booking calendars, lead-source tagging, the closing review request and the compliance shell (brokerage name and license on everything, team-name rules, fair-housing blocklist, consent before texting consumers or recruits); Growth adds the Roster & File Engine – the onboarding runway, the retention radar, the compliance file review queue, the commission and cap tracker, license and dues watch, advertising approvals and the agent production board – plus the full Monday broker's report and live dashboard; Full Engine adds recruiting – the recruiting pipeline with its two-year follow-up and meetings booked into the broker's calendar, plus outbound recruiting outreach – the two-lane partner program (broker-to-broker fees; reporting-only for lenders, title and escrow), printable recruiting materials, and every operating-rhythm automation across offices.

INCLUDED IN GROWTH AND FULL ENGINE

The Roster & File Engine

- Onboarding Runway: signed agreement to first deal, with every step owned and dated
- Retention Radar: inactivity, missed trainings, cap and anniversary signals turned into broker tasks
- Compliance File Review Queue: every transaction checked against the required-documents list before it can close
- Commission and Cap Tracker: company dollar toward cap from the back office; each agent sees only their own
- Office Lead Program with Accountability: rule-based routing, claim window, attempt tracking, referral split recorded
- License, Dues and Deadline Watch: license, CE, MLS and association dues, E&O – 90/60/30/7-day reminders
- Advertising Compliance Check: agent submissions checked and approved by the managing broker, archived
- Agent Production Board: opened, pending, closed and volume per agent for the Monday meeting
- Alumni and Departure Lane: respectful exit, pending-file referral tracking, alumni cadence with consent

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

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
Review requests	At the right moment after the sale, sent to everyone, never filtered by sentiment	●	●	●
After-hours AI assistant	Answers, qualifies and books when nobody is there, fenced by your industry's never-list	–	●	●
OPERATIONS & RETENTION				
Branded email templates	Your identifiers locked into every template	–	●	●
Client onboarding + invoicing	Welcome, what-happens-next, secure document upload, e-sign, payment links with reminders	–	●	●
Document / signature chase	Reminders with secure upload links until the checklist is complete; live checklist for staff	–	●	●
Database re-activation campaign	Old leads and past customers worked in a ramped, bounce-guarded, auto-unsubscribe campaign	add-on	●	●
Retention program	Anniversaries, check-ins, renewals, and the save flow when someone tries to leave	–	●	●
Industry engine: The Roster & File Engine	Onboarding Runway; Retention Radar; Compliance File Review Queue; Commission and Cap Tracker; Office Lead Program with Accountability; License, Dues and Deadline Watch; Advertising Compliance Check; Agent Production Board; Alumni and Departure 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.	–	●	●
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: agent desk, transaction and E&O fees.	–	●	●
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: joins the existing commission and cap tracker.	–	–	●
Billing reconciliation	One view of who is billed, who paid, who is overdue and who is being missed, across the CRM, your industry system and any old processor. Catches clients who are active in service but not billed anywhere. For you: agent fees.	–	–	●
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	●	●	●

COMPONENT	WHAT IT MEANS FOR YOU	LAUNCH	GROWTH	FULL ENGINE
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**	

QUOTE IT?	ADD-ON	FEE	NOTE
☐	**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**	
☐	**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

OFFICE LEADS

- ☐ Instant text + email to every company lead, under 60 seconds, under your brand [L]
- ☐ Rule-based routing to opted-in agents with a claim window and automatic reassignment [L]
- ☐ Missed-call text-back on office lines and sign-call numbers [L]
- ☐ Booking calendars per agent for appointments and showings [L]
- ☐ Lead-source tagging so cost per closing by source is arithmetic [L]
- ☐ Attempt tracking and monthly per-agent conversion numbers [G]

RECRUITING

- ☐ Recruiting pipeline with a two-year follow-up cadence [F]
- ☐ Meetings with recruits booked straight into the broker's calendar [F]
- ☐ "Not now" recruits revisited at their cap anniversary [F]
- ☐ After-hours AI assistant that answers consumer and recruit questions – never quotes commission, split or income [G]
- ☐ Outbound recruiting campaign to licensees, email-first, texts only with consent [F]
- ☐ Career-night and agent open-house funnels with printed recruiting packets [F]

ONBOARDING & RETENTION

- ☐ Onboarding runway from signed agreement to first deal [G]
- ☐ Retention radar that turns quiet agents into broker tasks [G]
- ☐ Recognition for first deal, cap and anniversaries (with consent) [G]
- ☐ Per-agent landing pages and QR cards that stay with the brokerage [G]
- ☐ Alumni lane and pending-file referral tracking when an agent leaves [G]
- ☐ Quarterly business-plan prompts per agent [F]

COMPLIANCE & SUPERVISION

- ☐ Compliance file review queue with reminders to agents and escalation to the managing broker [G]
- ☐ Document and signature chase with a live checklist per file [G]
- ☐ License, CE, dues and E&O deadline watch with broker alerts [G]
- ☐ Advertising submission, rule check and approval archive [G]
- ☐ Compliance shell: brokerage name and license on everything, team-name rules, fair-housing blocklist, opt-outs across channels [L]
- ☐ Third-party integration with your transaction or back-office system [+]

MONEY & PARTNERS

- ☐ Commission and cap tracker fed from the back office; monthly agent statements [G]
- ☐ Invoicing and payment links for agent fees (desk, tech, E&O, transaction) [G]
- ☐ Two-lane partner program: broker-to-broker referral fees; reporting-only for lenders, title and escrow [F]

- ☐ Affiliated-business disclosure built into the lender / title / escrow lane [F]
- ☐ Partner outreach campaign to relocation companies and out-of-area brokers [F]
- ☐ Custom reporting automation for multi-office roll-ups [+]

COMMAND & CONTROL

- ☐ Daily recap and weekly funnel report [L]
- ☐ Full Monday broker's report: production, retention, compliance queue (recruiting numbers with Full Engine) [G]
- ☐ Live dashboard for the broker-owner and managing brokers [G]
- ☐ Internal alerts: file review overdue, license lapsing, lead unclaimed, agent inactive [F]
- ☐ Written procedures and handoff booklet kept current [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]
- ☐ Billing that runs itself for agent desk, transaction and E&O fees: 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, joined to the commission and cap tracker: commissions calculated from money actually collected, using your own plan rules, with a monthly statement per agent and a 'needs attention' list [F]
- ☐ Billing reconciliation for agent fees: who is billed, who paid, who is overdue and who is being missed, across the CRM, your back-office system and any old processor [F]
- ☐ Payment processor migration: every paying client moved to new payment links or card-on-file; old invoices cancelled only after payment clears [+]

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?

- ☐ Broker supervision duties (e.g. California Reg. 2725) and transaction record retention (e.g. California B&P 10148, 3 years)
- ☐ Brokerage name and license number in advertising (e.g. California B&P 10140.6 and Reg. 2773); team names subordinate to the brokerage (B&P 10159.6/10159.7)
- ☐ NAR settlement rules: written buyer agreement before touring where required; compensation never presented as standard; no compensation offers in the MLS
- ☐ MLS listing rules: Clear Cooperation and NAR's Multiple Listing Options for Sellers (office exclusive / delayed marketing) as your MLS implements them
- ☐ RESPA Section 8: referral fees broker to broker only; nothing of value to settlement-service providers for referrals
- ☐ Affiliated business arrangement disclosure for affiliated mortgage, title or escrow (12 CFR 1024.15)
- ☐ No payments to unlicensed persons for referrals (e.g. California B&P 10137)
- ☐ Fair Housing: copy blocklist; Meta housing ads in the Special Ad Category
- ☐ TCPA written consent for automated texts to consumers and recruits; opt-outs honored across channels
- ☐ Do-Not-Call scrub for outbound calling
- ☐ Agent classification: independent-contractor agreement per IRC 3508 (template from your counsel)
- ☐ CAN-SPAM footer on every marketing email

Other: ____________

Are agents currently texting consumers or recruits from the brokerage's systems?	☐ Yes	☐ No
Do your forms (consumer and recruiting) capture written consent to text and call?	☐ Yes	☐ No
Does the managing broker approve agent advertising before it goes out?	☐ Yes	☐ No
Any past DRE / commission complaints, audits or MLS fines we should design around?	☐ 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

- ☐ Agent count, joins and departures
- ☐ Recruits in pipeline and meetings held
- ☐ Days from join to first transaction
- ☐ At-risk agents flagged and saved
- ☐ Transactions opened, pending and closed
- ☐ Volume and company dollar
- ☐ Files in review and review aging
- ☐ Office leads by source, claim rate and speed to first response
- ☐ Office lead conversion by agent
- ☐ License / E&O / dues lapses (target zero)
- ☐ Advertising pieces approved
- ☐ 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.

- ☐ Domain registrar / DNS login (or add us as a user)
- ☐ Google Workspace / Microsoft 365 admin (branded email + calendars)
- ☐ Website / IDX admin login
- ☐ Agent roster export from the back office (name, license, dates, office, cap anniversary)
- ☐ Consumer CRM export (contacts, notes, tags, sources)
- ☐ Recruiting list (current prospects and past conversations) with consent status
- ☐ Transaction management admin access or report export – read-only unless agreed
- ☐ Back-office report access for cap and company-dollar data – read-only
- ☐ Required-documents checklist by transaction type
- ☐ Policies and procedures manual and advertising rules
- ☐ Facebook Business Manager + page admin; Google Business Profile manager for each office
- ☐ Company EIN, legal address and website with privacy policy (required for business texting registration)
- ☐ Existing phone number(s) to port or forward
- ☐ Logo files, brand guide and office photos

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
MLS system (e.g. Matrix, Flexmls, Paragon -- per MLS)				
Association / NRDS member portal (dues)	nar.realtor			
State license portal (e.g. CA DRE eLicensing)				
dotloop	dotloop.com			
SkySlope	skyslope.com			
Lone Wolf Transactions / Lone Wolf Back Office	lwolf.com			
BoldTrail (formerly kvCORE) / BoldTrail BackOffice	boldtrail.com			
Loft47 (brokerage accounting)	loft47.com			
Follow Up Boss	followupboss.com			
BrokerKit (recruiting)	getbrokerkit.com			
QuickBooks Online	quickbooks.intuit.com			
Zillow Premier Agent / Flex	zillow.com			
Realtor.com Pro	realtor.com			
ShowingTime	showingtime.com			
Lockbox (Supra / SentriLock)	supraekey.com / sentrilock.com			
E&O insurance carrier portal				
Google Business Profile (each office)	business.google.com			
Meta Business Suite	business.facebook.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			