WHAT YOU ARE GETTING

The build, itemized.

Residential Brokerage

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 brokerage.

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September 2026

Launch

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

BUILD FEE	MONTHLY
$3,500	$697
one time	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 BROKERAGE

PIPELINE STAGES

Agents: Prospect Agent → Contacted → Meeting Set → Met → Offer Presented → Agreement Signed → Onboarding → Active → At Risk → Departed. Office leads: New Lead → Routed → Claimed → Contacted → Appointment Set → Agreement Signed → Under Contract → Closed → Past Client

- **Two pipelines.** First, the office-lead pipeline: New Lead, Routed, Claimed, Contacted, Appointment Set, Agreement Signed, Under Contract, Closed, Past Client, with Nurture and Dead lanes. Second, the agent pipeline: Prospect Agent, Contacted, Meeting Set, Met, Offer Presented, Agreement Signed, Onboarding, Active, with At Risk and Departed lanes.
- Office leads route to opted-in agents by rule (area, price point, language, rotation), with a claim window and automatic reassignment.
- **Source tags for consumers:** company website/IDX, sign calls, portals (Zillow, Realtor.com, Homes.com), relocation, open houses, past-client referral. For recruits: agent referral, license list, career night, social, inbound inquiry.
- The compliance shell adds the licensed brokerage name and license number on every message and page, team names shown under the brokerage name, a fair-housing blocklist on all copy, CAN-SPAM footers, and consent capture before any text to a consumer or an agent.
- **The review request fires on closing.** It asks for a review of the agent and the brokerage, and goes to everyone.
- A2P 10DLC sample messages cover consumer inquiries and agent operations (onboarding, compliance, deadlines).

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.
- **Client onboarding here means agent onboarding (the Onboarding Runway).** Consumer onboarding on office leads follows the Real Estate section.
- **Invoicing and payment links cover agent fees the brokerage bills:** desk, tech, E&O and transaction fees. Commission disbursement stays in the back office.
- **Long-term nurture:** consumer leads follow Real Estate (indefinite for closed clients, 24 months minimum for a cold lead). Recruits get 24 months or more in the Full Engine recruiting pipeline, because agents move on their own schedule.
- Retention program means agent retention (the Retention Radar), plus the office’s past-client program for company-generated clients.
- Per-rep landing pages and QR cards are per-agent pages under the brokerage brand, and they stay with the brokerage when an agent leaves.
- The after-hours AI assistant answers consumer listing questions and recruit questions ("what’s your split?" gets "the broker will walk you through the plan"). It never quotes a commission as standard, never quotes a split or cap as an offer, never characterizes a neighborhood, and never promises income to a recruit.

YOUR INDUSTRY ENGINE · INCLUDED IN GROWTH

The Roster & File Engine

Onboard, keep and supervise the office, with every file reviewed and every cap tracked (recruiting is in Full Engine)

Onboarding Runway

From signed independent-contractor agreement to first transaction: license transfer, MLS and association activation, lockbox key, E&O enrollment, tech accounts, brand assets, business-card and sign orders, training calendar, and mentor assignment. Each step has an owner and a due date, and the new agent gets a day-by-day checklist that shows what is done.

Compliance File Review Queue

Every transaction opened in dotloop, SkySlope or Lone Wolf appears in a review queue with the document checklist the state and brokerage require. Missing or unsigned items go back to the agent with reminders. The file cannot be marked ready-to-close until the reviewer checks it. Aging review items escalate to the managing broker.

Office Lead Program with Accountability

Company-generated leads (website, sign calls, portal, relocation) route by rule to opted-in agents with a claim window, contact-attempt tracking, and a reassignment if the agent doesn't work it. The internal referral split is recorded on the lead. Monthly per-agent lead-conversion numbers go to the broker.

Advertising Compliance Check

An agent submits a flyer, a social post or a website change through a form. It is checked against the brokerage's advertising rules (brokerage name, license number, team-name rules, fair-housing blocklist) and routed to the managing broker for approval, with an archive of every approved piece.

Alumni and Departure Lane

An agent who leaves gets a respectful exit and a light alumni cadence (office events, market updates) where they gave consent. Referral agreements for their pending files are tracked. A boomerang agent comes back to someone who stayed in touch.

Retention Radar

Agent-level signals the broker can see: no transaction opened in N days, missed trainings, a drop in lead-program activity, an anniversary coming up, cap nearly reached (the moment competitors call), license renewal due. Each signal becomes a task for the broker, such as a coffee or a check-in. The system never messages the agent about "risk."

Commission and Cap Tracker

A read-only view fed from the back-office system (Lone Wolf Back Office, BoldTrail BackOffice, Loft47, or the brokerage's own): each agent's year-to-date company dollar toward cap, the cap anniversary date, and pending commissions. Agents get a monthly statement of their own numbers. Payouts stay in the accounting system.

License, Dues and Deadline Watch

Per-agent renewal dates for the state license, continuing education, association and MLS dues, E&O and any required designations. Reminders go to the agent at 90, 60, 30 and 7 days, with a broker alert if something lapses. An agent with a lapsed license is flagged before they can take a new lead.

Agent Production Board

One page per agent showing opened, pending and closed transactions, volume, listings taken and lead-program results. This feeds the Monday broker meeting and the agent's own quarterly business-plan review.

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	MONTHLY
$9,500	$1,697
one time	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 BROKERAGE

Partners, lanes and rhythm in your business.

- **Partner lanes:** out-of-area brokerages and relocation companies (Lane A, licensee referral fees paid broker to broker under a written agreement). Lenders, title, escrow, home warranty, inspectors and insurance (Lane B, reporting and recognition only; RESPA-covered where settlement services are involved). Where the brokerage has affiliated mortgage, title or escrow companies, the affiliated-business disclosure is part of the Lane B build (12 CFR 1024.15). Lane B is a separate program with no fee, rate, W-9 or 1099 columns anywhere.
- **Recruiting funnel:** yes, and it is the point of this vertical. Full Engine carries the Recruiting Pipeline: every agent the broker is courting gets a record with the source (referral from an agent, license list, coffee, career night), the next touch, and a cadence of market updates, office events and a "what we do differently" series; meetings book straight into the broker's calendar; when the agent joins, the record converts to an onboarding file in the Growth engine's Onboarding Runway. Full Engine also adds the recruiting outreach campaign: email-first outreach to licensees from public license lists, career-night and open-house-for-agents funnels, and agent-referral rewards paid only as the state allows. Texts go to a recruit only with written consent.
- **Printable materials:** a recruiting packet, a value-proposition one-pager, and a commission-plan explainer, each version-numbered and reviewed by the broker.
- **Operating-rhythm automations:** Monday broker meeting prep (new, pending and closed; files in review; at-risk agents), weekly compliance-queue digest, monthly agent statements, quarterly business-plan prompts per agent, and a monthly recruiting report.
- **Internal alerts:** file review overdue, license or E&O lapsing, lead unclaimed, cap reached (recognition moment), agent inactive N days, a negative review naming an agent.
- **Multi-office:** office-level views for managing brokers, with the broker-owner's roll-up.

MONEY DESK

The money desk: onboarding, billing and commissions.

Built and running at Snap Credit Fix. Each line shows the package it comes in for Residential Brokerage.

- **Owner-routed onboarding** `[Growth and up]` 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** `[Growth and up]` 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** `[Full Engine]` 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** `[Full Engine]` 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.
- **Payment processor migration** `[Add-on, any package: $900]` Every paying client moved off a processor that closed or is being replaced: new payment links or card-on-file, old invoices cancelled only after payment clears, so nobody is double-charged or dropped.

TERMS

The fine print, in plain words.

- **Same three packages, same prices, every industry.** What changes is what goes inside them for residential brokerage.
- 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.