THE FULL WORKBOOK

SYSTEM 01 LIFETIME CLIENT OS™ | SYSTEM 02 LIFETIME VENDOR OS™

AMY STOCKBERGER REAL ESTATE

LIFETIME HOME SUPPORT ACADEMY

FROM CHAOS TO CONTROL

Real Market Mastery Through Repeat and Referral Systems

Hyperlocal. Referable. Scalable. Sellable.

AMY STOCKBERGER

Founder, Amy Stockberger Real Estate
Founder, Lifetime Home Support Academy

MONTANA REALTORS® GRI 2026

Every page from the session, every guide, every template, and the bonus tools. Plug and play.

How To Use This Workbook

This is the full version of your GRI workbook. The pages you filled in during the session are here, tagged Action Step. The pages tagged Deep Dive go further, with the worksheets, guides, and prompts we did not have time for in the room. Work through one section a week and you finish your 90-day build on schedule.

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SYSTEM 01

LIFETIME CLIENT OS™

The transaction ends. The relationship does not have to.

Most agents earn a client once, then spend the next five years and thousands of dollars trying to earn them again. A client you serve all year never has to be re-earned. They stay, they use what you built, and they bring you the people they love.

Your database is the one asset you already own and rarely work.

This workbook shows you how to build it yourself. Programs worth talking about, a touchpoint matrix with an owner on every stage, the physical layer, the digital layer, and the numbers underneath it all.

Run The Competitive Analysis

Find the white space. White space is where you build your moat.

Competitive analysis is researching the agents and teams around you to uncover their strengths, weaknesses and market gaps. Do it before you write core values, a vision or a value proposition. Analyze your competitors to see where the white space is, then analyze yourself to line your business up with what your audience actually needs.

WHY IT MATTERS

Spot market opportunities. Find unmet needs and underserved clients in your area.

Build client-centered programs. Line your programs, values and vision up with what clients want.

Sharpen your unique value proposition. Name what sets you apart.

Stay competitive. Watch emerging trends and competitor moves so you can adapt.

PART 1: IDENTIFY YOUR COMPETITORS

List the top 5 agents or teams in your market. Capture their names and websites, how visible they are, and the programs and guarantees they use to attract buyers, sellers and investors.

PROMPT FOR YOUR AI PLATFORM (CHATGPT / CLAUDE / GEMINI)

"Act as a market analyst and competitive intelligence consultant. Help me identify the top 5 real estate agents in [market or city], their names, websites and programs, including value propositions such as guaranteed sales, instant offers, relocation assistance and VIP client services."

	COMPETITOR	WEBSITE	VISIBILITY	PROGRAMS AND VALUE PROPOSITIONS	STRENGTHS	WEAKNESSES
1						
2						
3						
4						
5						

The Program Idea Bank

Everything you could offer. Check what you have. Check what you will build.

You do not need all of these. You need more than your competitors have, and at least one nobody in your market runs. Work down the list and mark both columns honestly.

SELLER PROGRAMS

PROGRAM IDEA	WHAT THE CLIENT GETS	HAVE IT	WILL BUILD
Guaranteed sale	Sold in a set number of days or you buy it.	☐	☐
Instant offer	A cash offer with no prep, no showings, flexible close date.	☐	☐
Cancellation guarantee	Cancel the listing any time, no fee, no fight.	☐	☐
Trade up program	Buy one of your listings and you buy their current home.	☐	☐
Fix now, pay at closing	Repairs and staging fronted, paid from proceeds.	☐	☐
Seller project manager	One person runs the prep, the trades and the timeline.	☐	☐
Certified pre-owned listing	Pre-inspected and certified before it hits the market.	☐	☐
Price guarantee	Full market value or you pay the difference.	☐	☐
Net sheet before they list	They know their walk away number before the sign goes up.	☐	☐
Side by side offer comparison	Several instant offers in a grid against the open market projection.	☐	☐

Buyer Programs

PROGRAM IDEA	WHAT THE CLIENT GETS	HAVE IT	WILL BUILD
Love it or leave it guarantee	Do not love it in year one and you sell it for free.	☐	☐
Buy back guarantee	You buy it back at the guaranteed price. Higher outside offer, they keep the difference.	☐	☐
Lease buyout assistance	Options to buy out their lease and get into a home sooner.	☐	☐
First time buyer concierge	Every step explained, every deadline handled.	☐	☐
Free design hours	Hours with a designer to plan renovations before they close.	☐	☐
Contractor network at no markup	Your trades at negotiated rates, no referral fee taken.	☐	☐
Co-buying agreement	Ownership split and exit terms documented for partners, friends or siblings.	☐	☐
Moving concierge	You run the move list so they do not have to.	☐	☐

SERVICE GUARANTEES

PROGRAM IDEA	WHAT THE CLIENT GETS	HAVE IT	WILL BUILD
Communication guarantee	A written update every week under contract, with what happened and what is next.	☐	☐
Communication guarantee with cash	Miss one and you pay them at closing. Every time.	☐	☐
Single point of contact	One name, one number, first showing to final walkthrough.	☐	☐
Response time guarantee	Every call and message returned same day.	☐	☐

After The Closing

This is where almost nobody competes. Most of your opportunity is on this page.

PROGRAM IDEA	WHAT THE CLIENT GETS	HAVE IT	WILL BUILD
Vetted vendor network	One list of trades you stand behind, with preferred pricing.	☐	☐
Equipment and tool lending	Truck, ladder, tables, bounce house. Free, for life.	☐	☐
Client portal and home hub	Documents, equity and a maintenance plan in one place all year.	☐	☐
Discount center	Real savings on what they buy anyway.	☐	☐
Annual maintenance plan	A seasonal checklist and the trades to call, every quarter.	☐	☐
Home value and equity review	A real valuation once a year, not a portal guess.	☐	☐
Your office is their office	Conference room, printer, moving boxes, garage sale signs. Free, forever.	☐	☐
Investor membership	Off market deals and investor training, whether or not they own one yet.	☐	☐
Referral club that renews	Refer once and gifts arrive for six months. Refer again and it restarts.	☐	☐
Client events all year	Bootcamps, seminars, family events, on you.	☐	☐

NICHE AND SPECIALTY

Downsizing and senior transition	Sorting, moving and selling handled for the whole family.	☐	☐
Military and first responder	Closing credits and a moving plan for the people who serve.	☐	☐
New construction advocacy	Your advocate at the builder table, lot selection to punch list.	☐	☐
Divorce and estate sales	A neutral process and a timeline everyone can live with.	☐	☐
Investor and portfolio services	Off market access, rent analysis, property management partners.	☐	☐
Relocation program	A full plan, from school districts to the moving truck.	☐	☐

What A Full Stack Looks Like

These are ours, so you can see how they fit together.

PROGRAM	THE PROMISE
VIP Club	"FREE lifetime access to our moving trucks, party and tool sheds, discount center, moving concierge and more." Saves clients up to $20,000 in the first year, and the support and savings continue for life.
Guaranteed Sales Program	"Your home sold in 89 days or we will buy it."
Instant Offer	"Take the stress out of selling your home with no prep, no showings, flexible close dates and more."
Trade Up Program	"Buy one of our listings and we'll buy your current home."
Love It Or Leave It Guarantee	"If you don't love it, we will sell it for FREE."
Cancellation Guarantee	"We offer Easy Exit options on our contracts to ensure that you are 100% satisfied."
Seller Operation Support	"Stress-free way to sell your home for a higher price and faster with our personal project manager services."
Golden Age Guided Move	"Designed to guide you through this journey with confidence and ease."
Lease Buyout Assistance Program	"Options to buy out current lease to get our clients into homeownership faster and easier."
Home Sweet Concierge	"White glove service to protect and enhance your home."
Home Support Team	"Local Best voted companies for everything from moving to maintenance."
One Roof Solution	Lender, title, insurance, interior decorator, property management and climate controlled storage, all in house.
Lifetime Home Hub™	"Manage home. Save money. Build wealth. Lifetime Home Support™ on demand."

Count what you checked in the Will Build column. Then pick the three you can launch in 90 days.

1. _____ 2. _____ 3. _____

Find The Gaps

After you analyze competitors, pinpoint where they fall short. Common gaps: no first-time buyer services, no client retention program, thin relocation support, nothing for the client after closing.

PROMPT FOR YOUR AI PLATFORM (CHATGPT / CLAUDE / GEMINI)

"Based on my competitors' programs, what gaps exist in [market or city]? How can I design unique programs to address these gaps?"

MARKET GAP	YOUR OPPORTUNITY TO DIFFERENTIATE

LOOK WHERE THEY DON'T

The white space is almost always after the closing.

Most competitors compete hard on before and during. Score each one on all three and the gap shows up fast.

	COMPETITOR	BEFORE THE TRANSACTION	DURING THE TRANSACTION	AFTER THE CLOSING	VENDOR NETWORK?
1					
2					
3					
4					
5					

TWO MORE PLACES TO LOOK

Mine their reviews, not only yours. Their one and two star reviews name the thing clients wish they had. That is your program, already validated.

Check who the AI platforms recommend. Ask your AI Platform who the best agent or team in your market is. Buyers ask that question now. Whoever comes back is your real competition, and if nobody comes back, that is open ground.

Run It The AI Way

The competitive analysis changed. Buyers ask a machine now.

A buyer used to type "realtors near me" and scroll. Now they ask an AI platform who the best agent is and take the answer. If you are not in that answer, you are not on the list, and no amount of ad spend fixes it.

THE FOUR CHECKS

CHECK	HOW TO RUN IT	WHAT YOU ARE LOOKING FOR
Are you in the answer?	Ask ChatGPT, Claude, Gemini and Perplexity: "Who is the best real estate agent in [your city]?" Ask it four different ways.	Whether you appear at all, and who does.
Why them and not you?	Ask the same platform: "Why did you pick those agents?"	The exact reasons it names. Those are the signals you are missing.
What does it say about you?	Ask: "Tell me about [your name] real estate in [your city]. What are they known for?"	Whether the answer matches what you actually do, and whether it is even correct.
What does it say about them?	Ask the same about your top three competitors.	The programs and claims the machine repeats back. That is what is published and indexed.

THEN FIX WHAT IT FOUND

Publish the answer. AI platforms repeat what is written plainly and in public. Put your programs, guarantees, service area and proof on pages of your own, in plain language, with real numbers.

Answer the questions buyers ask. Turn your FAQs into published pages. That is the text the machine quotes.

Get named by other sites. Local press, association pages, vendor sites and partner pages carry weight. Ask every vendor partner to name and link you.

Re-run the checks quarterly. Put it on the calendar. The answers move.

PROMPT FOR YOUR AI PLATFORM (CHATGPT / CLAUDE / GEMINI)

"Act as a market analyst. I am a real estate agent in [city]. Search the web and give me the top five agents or teams you would recommend to a buyer here, with the reason you picked each one and the source you used. Then tell me what is missing from my online presence that keeps me out of that list: [your website]."

HUMAN 2 HUMAN

Provide value beyond the transaction.

To keep clients coming back, give value that outlives the transaction. Simple guarantees and perks like free use of party supplies and moving trucks show clients you are in it for life. That value builds loyalty and drives repeat and referral business. Clients stop seeing a service provider and start seeing the person who makes their whole homeownership experience easier.

ACTION STEPS FOR YOU

01 Identify your sizzle. What makes you stand out from your competition? Added services, perks or guarantees that blow your clients' socks off.

02 Provide lifetime value. Offer services that keep serving after the sale, like a love it or leave it guarantee, a lease buyout program or equipment rentals.

03 Walk clients across the epiphany bridge. Help them see how you improve their life, save them time and cut their stress. They realize you are the best choice for their real estate and lifestyle needs.

Your sizzle: _____

Your lifetime value offer: _____

Your epiphany bridge story: _____

Analyze Yourself

Strengths, weaknesses and gaps, in your own words.

Pull your reviews from Google Business Profile, Zillow, Realtor.com and Facebook into one document. Read what clients praise and what they ask for. Then run the prompts below.

FEEDBACK ANALYST PROMPT

"Act as a feedback analyst. Here are reviews from my past clients on [Google, Zillow, Realtor.com, Facebook]: [paste reviews]. Summarize recurring themes. What do clients consistently praise, and what are the common complaints or suggestions for improvement?"

STRENGTHS PROMPT

"Act as a personal business analyst. Based on my description of my real estate services, help me identify my key strengths. What do I do better than my competitors?"

WEAKNESSES PROMPT

"Act as a business consultant. Based on my description of my real estate business, help me identify my weaknesses. What could I improve to better serve clients or grow my business?"

SELF-ANALYSIS WORKSHEET

Describe your business. Write a clear summary of what you offer and how you work with clients.

Add your competitive analysis findings. Compare yourself against what you learned about competitors.

Add your client feedback. Pull the common themes out of reviews and testimonials.

YOURS

CATEGORY	KEY FINDING	SOURCE	ACTION PLAN
Strengths			
Weaknesses			
Gaps			

Write Your Core Values And Vision

Your competitive analysis showed you the white space. Now name what you stand for.

YOUR VISION STATEMENT

Your vision is your North Star. Where do you want your business to be in 5 to 10 years, and what impact do you want to make on your clients and community? Keep it client-focused and keep it to one or two sentences.

I serve _____ by _____ so they _____

Draft Vision Statement: _____

Final Vision Statement: _____

YOUR CORE VALUES

Use your analysis. Leverage your strengths, weaknesses and gaps. Make every value specific, meaningful and provable.

	CORE VALUE	WHAT IT LOOKS LIKE IN YOUR BUSINESS	HOW IT SOLVES A CLIENT PROBLEM
1			
2			
3			
4			
5			

THE TEST (CIRCLE ONE FOR EACH VALUE)

Does it reflect a real strength your clients named? Y / N

Could a competitor claim the same value? Y / N

If a competitor could claim it, rewrite it.

> PROMPT FOR YOUR AI PLATFORM (CHATGPT / CLAUDE / GEMINI)
>
> *"Here are my core values and vision statement: [paste]. Here is my competitive analysis and self-analysis: [paste]. Which values are generic enough that a competitor could claim them? Which ones are provable? Rewrite the weak ones so they reflect my strengths and solve my clients' pain points."*

SYSTEM 01 | EXAMPLE

Our Vision Statement

"Serving clients and our team by building them a big, juicy legacy through Lifeti
Home Support™."

OUR CORE VALUES

CORE VALUE	WHAT IT LOOKS LIKE
1. Relationship based	Lifetime Home Support™. Building big juicy legacies for clients and team. Community giveback.
2. Repeatable excellence	System centric. Client focused. Teamerage model.
3. Communication[3]	More important than location, location, location. Overcommunication is the standard. Seasons of the contract videos.
4. Boldly unique	Bold marketing and unique advertising. From planes to the LED mobile digital truck. A program and strategy for each stage of buying and selling.
5. Continuous improvement	The superpower of not living in fear. PhDs in failing forward. We don't lose, we learn.

ACTION STEP 1 CHECKLIST

- ☐ Competitive analysis completed.
- ☐ Gaps and white space identified.
- ☐ Client journey mapped.
- ☐ Touchpoint matrix built, with an owner on every stage.
- ☐ Core values and vision written and tested.

Map Every Stage Of The Client Journey

Every client moves through six stages. Each stage has a job, and each job needs real, tangible value behind it. The stages loop: the Referral And Review Loop feeds new clients back into Attract.

Our six stages are below with what we deliver at each one. Write what you do today, then the value you will add.

STAGE	THE JOB	WHAT WE DELIVER	WHAT YOU DO TODAY	VALUE YOU WILL ADD
01 Attract	A lead discovers you.	Outreach within 5 minutes. Programs that draw them in: VIP Club, guarantees, Trade-Up, Home Support Team partners.		
02 Onboard	The lead becomes an active client.	Agreement signed. Lifetime Home Support explained by the agent plus a follow-up video. Access to the VIP Club, discount center, and partners.		
03 Service (Active Transaction)	Deliver the transaction with standout support.	Overcommunication. Weekly updates, Seasons of the Contract videos, moving trucks, equipment, and partner discounts.		
04 Close And Activate	Turn the client into a forever client.	Branded closing gift, QR stickers, perks checklist at the closing table, 30, 60 and 90 day check-ins.		
05 Forever Client	Support every season of life.	Lifetime access to equipment, partners, and storage. Client events, equity reviews, life change outreach.		
06 Referral And Review Loop	Clients grow your business through advocacy.	Review requests, referral checklist, referral appreciation, review thank-you gifts.		

The average client gives 5 referrals every 3 years. Forever clients who use the equipment and vendors get touched about 150 times a year in a service-centric way. Not sales calls. Service.

Once your stages are mapped, take them to the touchpoint matrix on the next page and put a number, a channel and an owner on every one.

The Touchpoint Matrix

Now put a count, a channel and an owner on every stage.

A stage without an owner never happens. A touch without a number never gets measured. Fill in your matrix using the stages and human moments you named.

OUR MATRIX

STAGE	HUMAN MOMENT	TOUCHES	CHANNELS	OWNER
Sphere	Trust before they need us	75 to 90	Email, text, events	Marketing + Agent
Attract	Brand gravity	6 to 8	Digital, community, LED truck	Marketing + Business Development + Inside Sales Agent
Onboard	Contract signed	7 to 9	Call, text, portal	Inside Sales Agent + Agent
Active Client	Whatever comes up, we have it	50+	Text, email, portal	Agent + Transaction Coordinator + Admin
Close / Activate	Activate the relationship	8 to 10	Mail, events, in person	Agent + Transaction Coordinator + Admin
Forever Client	Create advocacy	150+	Email, SMS, social, gifts	Marketing + Agent + Admin

YOUR MATRIX

STAGE	HUMAN MOMENT	TOUCHES	CHANNELS	OWNER (ROLE)
Sphere				
Attract				
Onboard				
Active Client				
Close / Activate				
Forever Client				

Solo agent? Write your own name in the owner column. The point is that every stage has one.

VIP Equipment Starter List

Our top 20 checked out items cost under $4,000.

These are the 20 pieces that go out the most, and they are the 20 to buy first. They replaced a $30,000 a year billboard campaign. Every piece is branded. In May alone, 800 to 900 pieces were checked out. This year, every client served averaged 2.4 pieces checked out.

PARTY EQUIPMENT	HAVE	BUY	YOUR COST	TOOL EQUIPMENT	HAVE	BUY	YOUR COST
Banquet chairs	☐	☐		Mega Max Little Giant ladder	☐	☐	
Banquet tables	☐	☐		Bissell carpet cleaner	☐	☐	
Canopy USA canopy	☐	☐		Ridgid carpet fan (small)	☐	☐	
Bounce house	☐	☐		Plastic garbage wheelbarrow	☐	☐	
Popcorn popper	☐	☐		Tradesman chop saw	☐	☐	
Cornhole boards	☐	☐		Aerator	☐	☐	
Beverage cart	☐	☐		Sawhorses	☐	☐	
Food warmer	☐	☐		Power drill	☐	☐	
Igloo coolers	☐	☐		UV sanitizing light	☐	☐	
Snow cone machine	☐	☐		Shop vacuum	☐	☐	

PARTY EQUIPMENT	TOOL EQUIPMENT	TOTAL	ROI
$2,309.50	$1,669.45	$3,978.95	38,000%

RULES WE RUN

Brand every piece. Birthday parties, weddings, family reunions, employee appreciation events and celebrations of life all become walking, talking billboards.

Lend to nonprofits for free. Onboard every nonprofit like a buyer or a seller. Their events become your marketing, and the media covers them.

Run Every Dollar Through The Framework

Marketing ROI Audit

We run every dollar we spend through three questions. Does the spend sell more homes? Does the spend strengthen relationships? Does the spend create recurring revenue? If a dollar fails all three, we don't spend it.

This test let us shut off nearly every major marketing expense and turn our marketing department into the Lifetime Home Support™ Marketing Engine.

OUR EXAMPLE

SPEND	ANNUAL COST	SELLS HOMES?	STRENGTHENS RELATIONSHIPS?	RECURRING REVENUE?	DECISION
Billboard campaign reminding past clients we exist	$30,000	Brand awareness at best	No	No	CUT
VIP equipment club, top 20 items	$3,979 one time	Yes	Yes	Yes, vendors fund placement	KEEP

YOUR AUDIT

List every marketing dollar from the last 12 months. Portals, ads, mailers, billboards, sponsorships, software, production.

SPEND	ANNUAL COST	CLOSINGS TIED TO IT	SELLS HOMES?	STRENGTHENS RELATIONSHIPS?	RECURRING REVENUE?	KEEP / FIX / CUT

The Easy, Sticky Value Add

Homeowner AI. A white labeled home hub, live in weeks.

Not ready for an equipment garage? Start here. Homeowner AI gives every client a hub branded entirely as yours, and gives you a dashboard that tells you which of them is about to move.

WHAT YOUR CLIENT GETS

FEATURE	WHY THEY COME BACK TO IT
Property intelligence dashboard	Their property details, ownership record, mortgage, property tax and climate risk in one view.
Home value and equity tracking	They watch their wealth grow with your name next to the number.
Market conditions for their street	Real local data, not a portal guess.
Home improvement planning	They plan the project inside your hub, then call your vendor.
Repair and maintenance management	A running record of what has been done and what is due.
Document storage	Every closing document lives with your brand on it.

WHAT YOU GET ON THE BACK END

This is the part most agents miss. The hub is the client gift. The dashboard is the business.

CAPABILITY	WHAT IT DOES FOR YOU
Database enrichment	Actionable data on more than 100 million homes, layered onto the contacts you already have.
Homeowner activity monitoring	It watches for the signals that come before a move.
Opportunity alerts	Your dashboard tells you who to call this week and why.
Engagement tracking	You see who opened their hub, what they looked at, and how often.

GET OUR WHOLESALE RATE

We hold wholesale pricing on this platform. You will not get this rate going direct. Tell us your market and your team size, and we send back the rate and the setup steps the same week.

See it running live at lifetimehomehub.com

CHANGE YOUR QUESTION

Don't ask: "Do you know of anyone who wants to buy or sell a house?"

Ask this:

"Who do you know that has a life change coming up?"

People going through major transitions, getting married, divorced, becoming empty nesters, typically have a housing need lagging behind. This one change opens deeper conversations and more opportunities.

ACTION STEP 2

Nail Your 30 Second Value Story

Most agents introduce themselves with generic phrases like "I sell homes," and that communicates no value. To stand out, build a 30 second value story that explains who you help, what problem you solve, and how you solve it with your unique approach. This isn't a pitch. It's your story, how you uniquely serve your clients.

THE FORMULA

I help [target audience] to [solve this problem] by [your unique approach].

Your audience: _____

Their problem: _____

Your unique value propositions: _____

YOUR 30 SECOND VALUE STORY

I help _____

to _____

by _____

EXAMPLE: AMY STOCKBERGER'S 30 SECOND VALUE STORY

"I'm Amy, I help buyers and sellers build wealth through real estate using our Lifetime Home Support™ model where we have a system and strategy for every step of the home buying and selling process before, during and forever. Our clients can save $20,000 in the first year and the savings and support continue for life."

30 Second Value Story + 50 Talk-To-Camera Prompts

Put your audience, their problem and your unique value propositions into your AI platform and run these four prompts in order.

01 CREATE YOUR 30 SECOND VALUE STORY

"You ARE Alex Hormozi, author of $100M Offers, HormoziGPT. You help craft offers people can't refuse because they are incredibly valuable according to Alex Hormozi's Value Equation. TASK: Write a 30 second value story using this formula: I help [insert target audience] to [insert what problem you help them solve] by [insert your unique approach]."

02 IDENTIFY YOUR AUDIENCE'S PAIN POINTS

"Now that you know my target audience, tell me the pain points my audiences struggle with in buying, selling and/or investing in real estate."

03 GET 50+ TALK-TO-CAMERA VIDEO TOPICS

"Now that you know my 30 second value story on who I serve, how I solve their problem with my unique solution as indicated here [insert 30 Second Value Story], I want you to pretend that you are someone who struggles with [insert list of pain points of your target audience] and with those struggles in mind, come up with a list of 50 questions that you'd ask me in order to get help and get solutions to your problems."

04 CREATE IMPACTFUL HOOKS AND CTAS

"Now, for each of the 50 questions you generated, craft: a compelling opening hook that grabs attention immediately. The hook should resonate with the pain points or desires of my target audience and make them curious to keep watching. Then a clear and actionable CTA that encourages the audience to take the next step, whether it's reaching out, subscribing, or engaging with my content. The hooks should be bold, emotionally engaging, or thought-provoking. The CTAs should feel natural, confident, and tied to the value I provide."

Steal From Amazon

Turn cost centers into profit centers.

Amazon built the biggest expense lines in its business into products other people pay for. Warehouses became fulfillment for other sellers. Servers became Amazon Web Services. The checkout became Prime. Every one of them started as a cost Amazon had to carry anyway.

You already carry costs. Marketing, portals, software, events, vehicles, gifts, office space. Run each one through the same question: who else benefits from this, and would they pay to be part of it?

OUR EXAMPLE: THE MOVING TRUCK

Before our first moving truck arrived, we sold the ad space on the back to our vendors. We were cash flowing before the truck showed up. We don't pay for those trucks. They pay us.

01 CLIENTS FOR LIFE
Clients use the truck for life, free.

02 PROFIT CENTER
Vendors buy the ad space.

03 BILLBOARD ON WHEELS
Our name drives through every neighborhood.

04 COMMUNITY GIVEBACK
Nonprofits borrow the truck, branded to us.

One asset. Four returns. If an asset serves you in one way only, rethink the asset.

YOUR ASSETS

List every asset you own or plan to buy. Fill in all four ways each one serves you.

ASSET	CLIENTS FOR LIFE	PROFIT CENTER (WHO PAYS FOR PLACEMENT?)	BILLBOARD EXPOSURE	COMMUNITY GIVEBACK

Do Business With Those Who Do Business With You

Your dollars go further when they build both trust and traffic.

Align your spending with businesses that actively support your business in return. Every service and product you use, personally and professionally. Make sure every vendor, partner and service provider knows how you can help their business grow by leveraging your network.

WHERE YOU SPEND TODAY	DO THEY SEND YOU BUSINESS?	WHAT YOU WILL ASK FOR

PROMPT FOR YOUR AI PLATFORM (CHATGPT / CLAUDE / GEMINI)

"Here is a list of businesses I spend money with: [paste]. For each one, suggest a specific way they could send referrals back to me, and write the one paragraph ask I would send them."

Cost Center Audit

Map each cost center, then turn it into a multi-functional asset.

01	02	03	04
Clients for life	A profit center	A billboard on wheels	Community giveback

One asset should serve you in Multiple ways. If an asset serves you in one way only, rethink the asset. Fill in your annual spend, then answer the leverage question for each line. Anything you mark yes carries over to the next page.

COST CENTER	ANNUAL SPEND	LEVERAGE FOR INCOME?	CLIENT VALUE IT COULD ADD	COST SHARING OPPORTUNITY
Marketing and advertising	$	Y / N	Co-branded materials for added exposure	Share costs with vendors
Portals (Zillow and others)	$	Y / N	Vendors gain access to the audience	Vendors cover the cost
Technology subscriptions	$	Y / N	Smoother client experience	Share tools with partners
Seminars and workshops	$	Y / N	Increases client loyalty	Partner covers event costs
Vehicles, trucks and company cars	$	Y / N	Free client use increases loyalty	Sell ad space or rent it out
Client gifts	$	Y / N	Enhances retention and referrals	Bulk vendor discounts
Lead generation systems	$	Y / N	Long term nurture converts	Share lead cost with vendors
Office space	$	Y / N	Community visibility	Rent unused areas
Transaction fees	$	Y / N	Offsets client costs	Helps cover operations

Cost Center Audit, Continued

Same rows. Now name how you reuse it, who would partner on it, and what you do next.

COST CENTER	REPURPOSING POTENTIAL	REFERRAL AND PARTNERSHIP POTENTIAL	NEXT STEPS	YOUR NEXT STEP
Marketing and advertising	Repurpose for social and digital	Lender, inspector, title	Create sponsorship packages	
Portals (Zillow and others)		Mortgage and title partners	Set up cost sharing agreements	
Technology subscriptions	Automate with workflows	Vendors who need the data	Set up affiliate links and cost sharing	
Seminars and workshops	Reuse the recording for future events	Lenders, insurance, financial planners	Package seminar sponsor tiers	
Vehicles, trucks and company cars	Reuse across the whole client lifecycle	Sponsors for vehicle ads	Set rental and sponsorship pricing	
Client gifts	Reuse at every touchpoint	Co-brand gifts with vendors	Set up a reward system with partners	
Lead generation systems	Monetize aged leads	Referral payouts to agents and vendors	Refer or monetize unused leads	
Office space	Host events and workshops	Nonprofits and small business	Approach nonprofits and partners	

TURN ONE EXPENSE INTO A PARTNERSHIP.
EXAMPLE: A HARDWARE STORE SPLITS THE COST OF YOUR CLOSING GIFT

What you already pay for: _____

What it costs you each year: $ _____

Local business that wants to reach your clients: _____

What you offer them (logo, coupon, feature): _____

When you will ask them: _____

AI Integration Tracker

The prompt that does the work for each cost center you flagged.

You marked cost centers yes on the leverage question. These are the prompts that turn each one into an asset. Paste your own details into the brackets.

USE CASE	PROMPT
Co-branded marketing	*"Create a 3 email drip and postcard campaign to promote my lender partner."*
Vendor agreement setup	*"Act as a business strategist. Draft a vendor sponsorship contract for truck ad space."*
Affiliate tracking system	*"Build a spreadsheet to track commissions and referral sources from vendors."*
Client gift automation	*"Automate thank you gifts in my CRM using tags and trigger events."*

YOUR PROMPTS

COST CENTER	THE PROMPT YOU WILL RUN	WHO OWNS IT

YOUR COST CENTER 90 DAY PLAN

Pick the five cost centers with the fastest payback. Give each one an owner and a date.

YOURS

ACTION	OWNER	DUE DATE	ESTIMATED RETURN

Referral And Partnership Tracker

Track what each partner shares, and when you talk again.

PARTNER OR VENDOR	SERVICE	COST SHARED?	REVENUE SHARED?	TOUCHPOINT INCLUDED?	FOLLOW UP DATE

This is not about vague strategy. It is co-branding, cost sharing, and monetizing every asset you already own. Start with this worksheet, get granular with your partners, and the business gets leaner every quarter.



Example only. Have your attorney review any sponsorship agreement before you use it.

The Profitable Client Event Framework

6 ANNUAL EVENTS: WHO YOU INVITE CHANGES EVERYTHING

MARCH

Ice Skating

Forever clients, vendors, and their employees

PURPOSE: RETENTION AND REFERRAL

APRIL

Dumpster Days

Forever clients, vendors, and their employees

PURPOSE: RETENTION AND REFERRAL

SEPTEMBER

Date Night

Forever clients only. Adults only. Raffle, auction, connection.

PURPOSE: RETENTION

OCTOBER

Trunk or Treat

Forever clients and the entire community. Thousands attend.

PURPOSE: LEAD GENERATION

NOVEMBER

Turkey Giveaway and Santa Photos

Forever clients and their families. Our signature annual tradition.

PURPOSE: RETENTION

FEBRUARY

Home and Lifestyle Expo

Forever clients and the community. Public facing.

PURPOSE: LEAD GENERATION AND VENDOR FUNNEL

Vendor employees become a referral pipeline. Community events bring in new leads. Clients-only events deepen loyalty. Mix all three.

THE PROOF

6 events. $17K expense. $27K in sponsorships.
$10K positive before a single referral closes.

THE CASH FLOW RULE

Set your budget first. Sell sponsorships to cover it. Every event must be cash flow positive.

$2,000+ minimum sponsorship revenue per event

Solo agent? Start with one event, not six. Four Silver sponsors at $500 cover a $2,000 event.

SPONSORSHIP TIERS: AMY'S EXAMPLE

GOLD SPONSOR	$1,500
Pre-event and Evergreen event video	
Email and social campaign	
Attendance at event	
Booth and LED truck advertising	
Video footage rights	
Shoutout at event	
Post-event recaps for 12 months	
Swag to hand out	

SILVER SPONSOR	$500
Evergreen event video	
Email and social campaign	
Attendance at event	
LED truck advertising	
Video footage rights	
Shoutout at event	
Post-event recaps for 12 months	

Build Your Own Tiers From What You Already Have

Logo on event signage | Social media shoutout | Feature in your client email | Table at the event | Mention in your event video

THE EVENT TIMELINE

Set the event date. Work backward.

60 DAYS OUT	Sponsors locked
45 DAYS OUT	Invitations sent
30 DAYS OUT	Marketing launches
14 DAYS OUT	RSVP follow-up
7 DAYS OUT	Confirmations and final details
EVENT DAY	Show up and serve
7 DAYS AFTER	Debrief

POST-EVENT DEBRIEF

Mandatory within 7 days.

01 Analyze survey results

02 What went well?

03 What do we do better next time?

04 Where do we add more value for clients and sponsors?

05 How many new contacts and referrals came from this event within 90 days?

150+ A forever client gets touched 150+ times a year. Every touchpoint is service-centric. Zero commission breath. Six events a year means six more reasons for your forever clients to say your name to someone who needs you.

YOUR FIRST EVENT

Event: _____

Date: _____

Who you invite: _____

Budget: $ _____

Sponsor goal: $ _____

THREE BUSINESSES TO ASK

1. _____
2. _____
3. _____

Get the full system, checklist, and complete course: lifetimehomesupport.com/serve

Compliance Note. Sponsorships from lenders, title companies, and other settlement service providers fall under RESPA. Payments must match the fair market value of the advertising they receive. Check with your broker or attorney before you sign.

Industry Events Project

Set it up once. Use it every time you come home from an event.

Every event you attend is an investment of time, money, and energy. Most agents come home with a notebook full of ideas, a stack of business cards, and assets that never get looked at again. This project changes that. You upload everything you captured. The AI reads it against your goals and tells you what to do with every single thing you learned.

STEP 1: BUILD YOUR GOALS FOUNDATION FILE

The project only works when it knows what you are building toward. Your Goals Foundation File holds your 90-day rocks, 1-year plan, 3-year picture, and 10-year target. Already have them? Save them as Goals.txt and skip to Step 3. Do not have them yet? Open Claude on your phone, tap the microphone, and use this prompt.

GOALS FOUNDATION FILE PROMPT

"I need to build my Goals Foundation File to upload into my Industry Events Claude Project. Interview me using the questions below. Ask one question at a time. Wait for my full answer before asking the next one.
1. What are the 3 to 7 most important things your business needs to accomplish in the next 90 days? These are your Rocks. Done means done, not in progress.
2. What must be true by the end of this year for you to call it a successful year? Give me revenue, team goals, and your top 3 priorities.
3. Describe your business three years from today as if you are already standing in it. What do you see?
4. What is the long-range destination? Where is this all going in 10 years? Say it boldly in one to three sentences.
5. What are you building this for? Who depends on it?
After I answer all five, produce my Goals Foundation File with these section headers: 90-DAY ROCKS | 1-YEAR PLAN | 3-YEAR PICTURE | 10-YEAR TARGET | WHY I AM BUILDING THIS"

STEP 2: SET TWO CALENDAR REMINDERS NOW

Every 90 days: Reset your rocks, update Goals.txt, and re-upload it to the project.

48 hours before any event: Confirm your goals file is current.

Your AI is only as smart as the last time you updated your goals file.

STEP 3: SET UP THE PROJECT

Claude: Projects, New Project, name it Industry Events | Goals Command Center, paste the Project Instructions on the next page, upload Goals.txt.

ChatGPT: Projects, New Project, same name, paste the same instructions in the project settings, upload Goals.txt.

For every event: Start a new chat inside the project named Event Name | City | Month Year, upload everything you captured, and paste the trigger prompt.

Project Instructions And Trigger Prompt

PROJECT INSTRUCTIONS: PASTE INTO CLAUDE AND CHATGPT

ROLE. You are my Strategic Event Intelligence System. Analyze everything I upload from an industry event and cross-reference it against my Goals Foundation File. Turn raw event content into a prioritized, delegatable action plan.

FOUNDATION FILE. My Goals Foundation File is uploaded to this project. Reference it every time. Every output must connect back to these goals.

WHEN I UPLOAD EVENT CONTENT. 1. Inventory everything. 2. Run every item through S.A.D.D.: Systemize, Automate, Delegate, or Delete. 3. Apply the Juice Worth the Squeeze check. 4. Sort every item into one of the 9 output buckets. 5. Produce the full Event Intelligence Report.

THE 9 OUTPUT BUCKETS. 1. 90-Day Accelerators. 2. Next 90-Day Candidates. 3. 1-Year Goal Additions. 4. Long Runway (3 or 10 Year). 5. Parking Lot. 6. EA / VA Ready. 7. Team Share. 8. Follow-Up Contacts: Name, Company/Role, Why They Matter, CRM Action, Deadline. 9. Resources To Research.

OUTPUT FORMAT. Event Summary: event name, date, top 3 themes, ROI rating. Buckets 1 through 9 in order. EA-Ready Summary: one clean list of every delegatable task, ready to hand off.

STYLE RULES. Direct. Specific. No fluff. Every item connects to my goals or gets flagged for deletion.

THE TRIGGER PROMPT: PASTE AFTER UPLOADING EVENT CONTENT

"I just got back from [EVENT NAME] in [CITY], [DATE]. I have uploaded everything I captured. Cross-reference all of it against my Goals Foundation File and produce my full Event Intelligence Report using the 9 output buckets. Run every action item through the S.A.D.D. filter and the Juice Worth the Squeeze check before sorting. For every business card or contact I uploaded, include them in Bucket 8 with their name, role, why they matter, the CRM action I should take, and a deadline. Flag my top 3 highest-priority actions across all buckets. End with the EA-Ready Summary. Be direct. Cut anything that does not connect to my goals."

WHAT TO UPLOAD FOR EACH EVENT

- [ ] Photos of slides or whiteboards
- [ ] Your notes or voice-to-text
- [ ] Prompts, frameworks, or systems shared from stage
- [ ] Quotes for your content library
- [ ] Downloaded workbooks and PDFs
- [ ] Business cards, photographed or typed with context
- [ ] Tools or apps you want to research



2026 CLIENT EVENTS

2026 CLIENT EVENT SCHEDULE

29 MAR, 2026	ICE SKATING @ SCHEELS ICEPLEX 2:00 - 3:30 PM
11-12 APR, 2026	SPRING CLEANING DUMPSTER DAYS
17 SEP, 2026	DATE NIGHT @ ROUGH CUT SOCIAL 5:30 - 8:00 PM
24 OCT, 2026	TRUNK OR TREAT 3:00-5:00PM	FREE BOOTH
19 NOV, 2026	21ST ANNUAL TURKEY GIVEAWAY 4:30 - 7:00 PM
7 FEB. 2027	HOME & LIFESTYLE EVENT 4:00 - 6:00 PM

AMY STOCKBERGER REAL ESTATE HOME SUPPORT TEAM

GOLD SPONSOR $ 1500

- Postcard Advertisement
- Evergreen YouTube Video of Event
- Pre-Event Hype Video
- Email Marketing Campaign
- Social Media Marketing Campaign
- Attendance at Event
- Booth for Unique Marketing Materials
- Advertising on LED Truck During Event
- Access to Video Footage to be Used in Your Marketing
- Thank You Shout Outs to Attendees @ Event
- Post Event Recaps (12+ months run time)
- Bring Swag to Hand Out
- Monthly closing address report for the next 12 months

SILVER SPONSOR $ 500

- Evergreen YouTube Video of Event
- Email Marketing Campaign
- Social Media Marketing Campaign
- Attendance at Event
- Advertising on LED Truck During Event
- Access to Video Footage to be Used in Your Video Marketing
- Thank You Shout Outs to Attendees at Event
- Post Event Recaps (12+ months run time)

AMY STOCKBERGER REAL ESTATE

For more information, contact Josh Mulder, Business Development Director
(605) 906 8636 or HST@AmyStockberger.com

Our real sponsor flyer. Build yours with your own dates, events and tiers.

Nail Down Your LTV, CRV And CAC

Lifetime value of a relationship, rather than the value of a transaction.

THE THREE NUMBERS THAT SET EVERYTHING ELSE

Most agents measure one deal. These three measure the relationship. Run each one on your own average commission.

TERM	DEFINITION	FORMULA	RUN AT $10,000
Lifetime Value (LTV)	The total revenue one client generates for you over the entire length of the relationship. In real estate: every commission you earn from that person's own transactions, start to finish.	Average commission x Transactions that client does with you	$10,000 x 2 = $20,000
Client Referral Value (CRV)	The revenue generated by the new clients one existing client sends you. It measures what a client is worth beyond their own business.	Average commission x Referrals that client sends you	$10,000 x 1 = $10,000
Total Relationship Value (TRV)	The full economic value of one relationship: what they spend with you plus what the people they send you spend. It sets the ceiling on what you can afford to invest in keeping them.	LTV + CRV	$20,000 + $10,000 = $30,000

Count transactions and referrals across the whole relationship, not one year. A client who buys at 28, moves at 35, moves again at 44 and downsizes at 67 is four transactions, not one.

WHAT IS ONE CLIENT REALLY WORTH?

Run your own numbers. Use your average commission. Be conservative on referrals. One is enough to prove the point.

	OUR EXAMPLE	YOURS
First transaction	$10,000	$
Next transaction	$10,000	$
One referral	$10,000	$
One relationship	$30,000	$

$98,000 Average relationship value in our model. Make each relationship worth more. Spend less getting the next one.

SYSTEM 01 | STEP 03 | KNOW YOUR NUMBERS

Cost To Acquire A Client (CAC)

CAC is the total amount you spend to get one new client through the door. Add up every dollar you spent last year getting business in, then divide by the number of new clients who actually closed. That is what one client costs you.

Count every dollar aimed at getting new business: portals, ads, mailers, billboards, sponsorships, lead software, content production, and the share of any salary paid to generate or convert leads. Do not count marketing for a listing you already have, or closing gifts for a client you already earned.

FORMULA

CAC = Total Lead Generation Spend / New Clients Closed

Now set CAC next to TRV. If one relationship brings in $30,000 in commission over the years and it costs you $2,500 to win that client, the cost of getting them ate $2,500 of it. Every dollar you cut from your CAC is a dollar you keep. That's the case for building a repeat and referral business: your past clients send you new ones, and those new clients cost you almost nothing to win.

LEAD GEN SPEND, LAST 12 MONTHS

Portals	$
Ads	$
Mailers	$
Billboards	$
Digital production	$
Salaries tied to lead generation	$
TOTAL LEAD GEN SPEND	$
Divided by clients closed	
= YOUR CAC	$

BENCHMARKS

INDUSTRY

$2,500
per closed transaction

PORTAL LEAD

$8,000
per closing

AMY STOCKBERGER REAL ESTATE

Under $125
per client

SYSTEM 02

LIFETIME VENDOR OS™

Real estate agents are the ultimate super connectors.

Your clients need reliable resources. Your agents need tools that keep them sticky. Local businesses need a way to scale and keep good people. One network solves all three.

Your vendor list is the one asset you have never monetized.

The next pages show you how to build the network yourself.

SYSTEM 02

Three Problems To Solve

Every ideal client profile creates success for the other two.

IDEAL CLIENT PROFILE	THEIR PROBLEM	HOW THE NETWORK SOLVES IT
Buyers and Sellers	They need reliable resources for one of their largest investments.	A network of the best local companies who give legendary care, preferential treatment and sometimes preferential pricing.
Agents	They need tools that keep them sticky to the client.	A resource for life to hand every client, every year.
Vendors	They need to scale sales and attract and retain talent.	Omnipresent marketing, synergistic networking, business development and access to your clients.

YOUR VENDOR REVENUE MATH

LINE	EXAMPLE	YOURS
1. Annual vendor revenue goal	$420,000	$
2. Average annual vendor investment	$3,500	$
3. Vendors needed (Line 1 ÷ Line 2)	120	
4. Closed units per vendor per year	About 0.75	
5. Average commission	$10,000	$
6. Referral GCI from the network (Line 3 x Line 4 x Line 5)	$900,000	$
7. Cap per industry category (deep vs. wide)	3	

Employee reach: every vendor gives you access to their staff. If 3% to 5% of a sphere transacts in the next 12 months, then vendors _____ x average employees _____ x 3% = _____ transactions in play each year.

Determine Your Deliverables

The Home Support Team™: 120+ of the best local companies, paying us.

$3,500 Tier One Partnership per year. The entry tier every partner starts in.

Examples of some of Amy's Tier One deliverables. Use these to build your own list. Amy Stockberger Real Estate refers clients to partners. We do not own or operate their businesses.

WHERE PARTNERS SHOW UP ONLINE

DELIVERABLE	WHAT THE PARTNER GETS
Consumer-facing website	Two homes on one website. Partners are listed on the public side, in front of every visitor.
Private client-facing site	The client side, where only our clients see partner discounts.
Branded client portal	Our client portal, built for clients and agents, with partners listed inside it.
Lifetime Home Hub™	Partners featured on our Lifetime Home Hub.
Homeowner AI platform	Partners sit inside the platform clients use for everything home.
Social media and YouTube	The Home and Lifestyle Series, plus features across our channels.

WHERE PARTNERS SHOW UP IN THE TRANSACTION

DELIVERABLE	WHAT THE PARTNER GETS
Pre-listing packet	In front of sellers before the listing appointment.
Buyer packets	In front of every buyer at the start of the search.
Seller packets	In front of every seller at the listing appointment.
Buyer presentations	Named in the presentation every buyer sees.
Seller presentations	Named in the presentation every seller sees.
Closing folders	In the folder clients keep for years.
Final walkthrough stickers	Stick it. Scan it. Solve it. Stickers on garage door openers, water heaters, pantries and kitchen cabinets.

Deliverables, Continued

WHERE PARTNERS SHOW UP IN OUR MARKETING

DELIVERABLE	WHAT THE PARTNER GETS
ReminderMedia magazine	A partner spotlight in a magazine clients do not throw away.
Email and SMS marketing	Recommended by name in our campaigns.
Private Facebook group	Partners post direct in our private VIP client group.
Google, Bing and Yelp reviews	Reviews for the partner's business.

WHERE PARTNERS GET ACCESS

DELIVERABLE	WHAT THE PARTNER GETS
Present at team meetings	Time in front of our agents.
Access to VIP equipment	Partners get portal access and check out our equipment too.
Training and nesting offices	Use of our training rooms and nesting offices.
Employee benefits package	A benefits package branded for each partner, for their whole team.

BUILD YOUR OWN LIST

Circle the 5 you already have. Star the 5 you can add in 30 days. Those 10 are your Tier One.

WHAT PARTNERS COMMIT BACK

Value runs both directions.

PARTNER COMMITMENT	WHY IT MATTERS
12 month commitment	Referrals compound the longer a partner stays.
In-person speaking opportunity with their staff, up to 3 times a year	You present real estate topics and explain their employee benefits.
Promotional items given to their staff at least 2 times per term	Your brand lives inside their break room.
Legendary care on every client referral	Your clients get the same care you give them.

Solo agent? Start with three vendors you already refer, and three things you already give them.

Some Dos And Don'ts Of A Vendor Agreement

Points to take to your own attorney.

Not a contract. Not legal advice. These are general points to take to your own attorney. This is not a template, a form, or a substitute for an agreement drafted for your state and your business. See the Terms Of Use at the back of this workbook.

DO

- ✓ Do call it a membership or advertising agreement. Keep the word partner for your marketing, not your contract.
- ✓ Do ask your attorney which entity signs. Many owners run a vendor program through a business separate from their brokerage.
- ✓ Do state you are independent businesses. No partnership, joint venture, franchise, agency or employment relationship.
- ✓ Do tie every fee to specific advertising deliverables. Fees buy marketing services at fair market value, and the agreement lists them.
- ✓ Do label audience numbers as estimates. Impressions, reach and database size are not guarantees.
- ✓ Do require a consumer disclosure. Vendors tell customers they are not required to use any company that advertises with you.
- ✓ Do set a fixed term and clear renewal rules. Include the cancellation deadline and a renewal reminder before it.
- ✓ Do spell out termination and refunds. Separate termination for cause from termination without cause, and state what happens to fees in each. Set payment terms and late fees your state allows.
- ✓ Do limit your liability for vendor work. Add indemnification so the vendor defends you against claims about their work.
- ✓ Do require licenses and permits. The vendor keeps everything required for their work and gives written permission to use their name and logo.
- ✓ Do name governing law and venue. Add an entire agreement clause and require changes in writing.
- ✓ Do have your attorney draft or review it before the first signature.

DON'T

- × Don't use the word leads. Never charge for, promise or describe leads or referrals in the agreement.
- × Don't pay or accept fees for referrals. RESPA Section 8 covers settlement service providers such as lenders, title and home warranty companies.
- × Don't guarantee results. No promised referrals, revenue, leads or return on investment.
- × Don't require or trade reviews. Required or paid reviews break Google and Yelp policy and the FTC consumer review rule.
- × Don't require clients to use a vendor. Clients always choose their own providers.
- × Don't let a non-party make promises. If one entity signs, that entity makes every promise in the agreement.
- × Don't name outside people or companies in obligations. Only the parties who sign carry duties.
- × Don't print claims you can't source. Keep a source on file for every savings figure and statistic.
- × Don't copy another company's agreement. That includes anything you saw in this presentation.
- × Don't let the math drift. Monthly price x 12 must equal the annual price you list.

Your agreement is yours. Use of this list is governed by the Terms Of Use at the back of this workbook.

SYSTEM 02 | STEP 01

Decide How You Charge

One price, tiers, or a la carte. Pick before you pitch.

You have your deliverables. Now decide the shape of the offer. There is no right answer, only the one that fits your market and the time you have to deliver.

MODEL	HOW IT WORKS	BEST WHEN	WATCH OUT FOR
Flat fee	One annual price. Every partner gets the same package.	You are starting out, or your deliverables are the same for everyone.	You leave money on the table with big vendors who would pay more.
Tiers	Two or three packages at rising prices and rising deliverables.	Your market has both small trades and large regional companies.	Tiers only work if the top tier is visibly better. Thin gaps kill the upsell.
A la carte	A base membership plus add-ons priced individually.	You have physical assets and events people want to buy into.	It gets complicated fast. Cap the menu and keep the base simple.

PRICE YOUR DELIVERABLES

List every deliverable you offer or plan to offer. Know your cost to deliver before you set the price.

DELIVERABLE	WHO IT IS FOR	YOUR COST TO DELIVER	WHAT YOU WILL CHARGE

SYSTEM 02 | STEP 02

Let Your Data Pick Your Star Players

Your last six months of inspection reports already ranks every trade in your market.

You do not have to guess which companies are worth recruiting. You have been paying for the answer at every closing. Every home inspection report you have ever received names the problems, and the trades that fix them show up over and over.

RUN THE PLAY

01 Pull the last six months of inspection reports. Yours, your team's, anything you can get from your transaction files.

02 Strip the personal information. Remove names, addresses and anything identifying before it goes anywhere near an AI platform. Addresses and client names never leave your office.

03 Run them through your AI Platform. Use the prompt below to rank what actually breaks in your market.

04 Recruit against the ranking. The trades at the top of that list are the ones your clients will call. Those are the partners worth the most, and the ones who will pay the most.

> PROMPT FOR YOUR AI PLATFORM (CHATGPT / CLAUDE / GEMINI)
>
> *"Here are home inspection reports from the last six months in my market, with all personal information removed: [paste or upload]. Rank the trades and service categories by how often issues appear in them. For each one, tell me how many reports mentioned it, the typical severity, and whether it usually has to be fixed before closing. Then rank the categories by how valuable a partner in that category would be to a real estate team."*

Everyone else recruits the vendors they happen to know. You recruit the ones your market actually needs, in order.

Your Ranked Trades

Fill this in from what your AI Platform gives back. This becomes your recruiting order.

RANK	TRADE OR CATEGORY	HOW OFTEN IT SHOWED UP	MUST FIX BEFORE CLOSING?	WHO YOU WILL RECRUIT
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

Build Your Bench

Start with your star players, the companies your clients already ask you for.

You already have the relationships. You're missing the structure. You're not cold calling. You're calling people who already know you. Even vendors who turn down our program still refer us business.

CATEGORY	COMPANY	OWNER / CONTACT	HOW YOU KNOW THEM	EMPLOYEES	ADVERTISING ALREADY?	DATE CONTACTED	RESULT
HVAC							
Plumbing							
Electrical							
Roofing							
Cleaning							
Lawn							

BEFORE YOUR FIRST CALL

Partner goal number: _____

Units closed goal from this program: _____

Deadline to hit your partner goal: _____

Weekly time blocks for partner sales: _____

DAILY OUTREACH COMMITMENT

DAILY MINIMUM	MON	TUE	WED	THU	FRI
5 conversations with companies	☐	☐	☐	☐	☐
5 direct messages	☐	☐	☐	☐	☐
5 emails	☐	☐	☐	☐	☐

Home Support Team Recruiting List

Every category worth a partner. Write in the company you already use.

CATEGORY	COMPANY	CATEGORY	COMPANY
Accounting / Bookkeeping		Commercial Real Estate	
Advertising		Concrete Contractors	
Air Duct Cleaning		Cosmetologist / Hair	
Alarm Systems		Day Care	
Architect / Engineering		Decking Contractors	
Attorney / Paralegal		Delivery	
Auto Repair / Sales		Dentists	
Banking		Designer	
Bat Removal		DJs / Entertainment	
Bath Remodeling		Digital Marketing	
Blinds / Window Treatments		Electricians	
Bounce Houses		Employment Service	
Broadcasting		Entertainment Venue	
Business Consulting		Epoxy Flooring	
Cabinet Sales		Exterminator Services	
Carpet Cleaning		Facials	
Carpet / Flooring Sales		Fencing	
Catering		Finance & Wealth Management	
Cell Phone Sales		Financial Advising	
Chiropractic		Fireplace Sales & Install	
Cleaning Services		Flooring Sales	
Closet & Garage Organization		Food Truck	

Recruiting List, Continued

CATEGORY	COMPANY	CATEGORY	COMPANY
Furniture Sales		Insurance: Casualty	
Garage Doors		Insurance: Business	
Garbage / Roll Off Dumpsters		IT / Information Technology	
General Contracting		Jewelers	
Gutters / Downspouts		Labels	
Gyms		Landscaping / Lawn Care	
Handyman Services		Lawyer Services	
Hair Salons		Life Coach	
Health & Wellness		Lighting	
Home Appliances & Repair		Locksmithing	
Home Building		Massage	
Home Decor		Mattress Sales	
Home Improvement & Repair		Mortgage Lender	
Home Inspection		Moving Company	
Home Security		Nail Care	
Home Storage Design		Nutrition	
Home Warranty		Office Equipment	
Hotels		Painting Services	
HVAC Services		Party Rentals	
Insurance: Health		Pest Control	
Insurance: Life		Pet Grooming	
Insurance: Property		Pet Supplies & Nutrition	

Recruiting List, Continued

CATEGORY	COMPANY	CATEGORY	COMPANY
Pet Waste Removal		Signage	
Photography		Skin Care	
Plumbing Services		Snow Removal	
Power Washing		Stockbroker	
Printing Company		Title / Closing / Escrow	
Promotional Items		Travel Agent	
Radon Mitigation		Tree Removal / Pruning	
Repair / Maintenance		Underground Fencing	
Residential Real Estate		Vinyl & Vehicle Graphics	
Retail Products		Water / Fire Restoration	
Restaurants		Waste Management	
Roofing Services		Web Design	
Siding Contractors			

Cap each category so partners stay valuable. We cap ours at 3 companies per industry.

AI Tools For Building A Profitable Vendor Network

Five prompts. One goal: build a vendor network that recruits itself, refers constantly, and pays you back.

Most agents build their vendor list reactively. Whoever they happen to know, whoever a client asks about. That is not a system. That is luck. These prompts replace luck with a repeatable process you run in under an hour and hand off to anyone on your team.

1 VENDOR TIMELINE SORTING PROMPT

Why this matters: Most agents think about vendors by category. The best agents think about vendors by timing. Your client's needs change from contract to close to year three of homeownership. Recruit by timing and you become indispensable at every stage.

> PROMPT
>
> *"Sort the following vendor types by when they are most useful to a homeowner: before listing, during escrow/under contract, after closing, seasonally or annually. Return it as a table with a short note on why each vendor is relevant during that phase."*

What to do with the results: Use this table as your vendor recruitment roadmap. Start with the categories that serve clients right after closing. Those relationships generate the fastest referrals back to you.

2 LOCAL VENDOR FINDER PROMPT

Why this matters: You do not have time to Google every vendor category, evaluate reviews, and compile contact info from scratch. This prompt gives you a qualified starting list instead of a blank page.

> PROMPT
>
> *"Give me a list of 5 highly rated [vendor type] in [MY CITY]. Include business name, phone number, website, and Google rating."*

What to do with the results: Run this for your top 10 vendor categories. Drop the results into a spreadsheet. Cross-reference against vendors your past clients have mentioned positively. That overlap is your priority outreach list.

3 VENDOR FIT SCORING PROMPT

Why this matters: One bad vendor damages your reputation with your client. You need a consistent standard for who gets in and who does not.

> PROMPT
>
> *"Score this vendor 1 to 5 in the following categories: reviews and reputation, online presence, responsiveness, value to homeowners, alignment with my standards. End with a quick summary: should I move forward with this partner or not, and why?"*

What to do with the results: Set a minimum score before any vendor enters your program. Document your scores so you have a record when it is time to renew or remove partners.

AI Tools For Building A Profitable Vendor Network, Continued

4 OUTREACH MESSAGE PROMPT

Why this matters: Most agents approach vendors as a favor. That framing leaves money on the table and sets up a one-sided relationship. This prompt opens every conversation as a business partnership.

> PROMPT
>
> *"Write a short, professional message to a [vendor type] to explore a potential partnership. Let them know I refer homeowners regularly and I am looking for vendors who also refer business back when the opportunity arises. Invite them to connect briefly this week."*

What to do with the results: Add one specific detail about their business before you send it. A recent review, a project you noticed, or a mutual connection. That one personal line is the difference between a reply and silence.

5 MARKETING CALENDAR STARTER PROMPT

Why this matters: Your vendor program only generates referrals if your vendors stay engaged with your brand. A monthly calendar keeps the relationship warm and keeps your name in front of their entire client base.

> PROMPT
>
> *"Create a simple 4-week marketing calendar featuring one vendor per week. Include a weekly social media shoutout idea, one vendor giveaway or collaboration idea, and one follow-up action such as a text, tag, or message."*

What to do with the results: Assign execution to an admin or a marketing coordinator. Run this prompt at the start of every month, rotate through your full vendor list across the year, and track which vendors generate the most inbound referrals.

The agents who build the most referable businesses do not have better relationships. They have better systems for maintaining them.

The Vendor Sales Framework

The exact framework we use with every new vendor prospect.

NON-NEGOTIABLES OF EVERY MEETING

- Know the cost to acquire a customer (CAC) in their industry before you walk in.
- Follow the framework.
- Book a meeting from the meeting.
- Make sure everyone in the room understands your client model.
- Ask for the enrollment.
- End with: "Who do you know with a life change coming up?"

PHASE 1: QUALIFY

Set up: Look up their LinkedIn, Facebook and Instagram before you walk in.

> SMALL TALK PIVOT
>
> *"At [Your Company] we do things differently. I have a sales process I follow to see if I can create value for you. Is that ok? My goal here is to be helpful."*
>
> Then explain your model: vision statement, core values, and your system and strategy before, during and forever.

UNDERSTAND THEM

1. Tell me about your business.	5. What got you into this?
2. What do you do?	6. What is your average ticket price?
3. What pain point do you solve?	7. What does a new customer cost you to acquire?
4. Who is your ideal client?	8. What business issue is at stake right now?

DECISION FRAMING

These questions make them sell you back to you and show you their expectations.

"Out of curiosity, why now?"

"What made this a priority enough to take time today?"

"If we look back in 3 months, what would make this conversation feel like a win?"

Phase 2: Find The Gap

RESULTS: THE DREAM	REALITY: RIGHT NOW	ROADBLOCKS
12 months from now, tell me about your marketing. Networking? Partnerships? Business development? Workforce? What does success look like for you?	Tell me about your marketing today. What is working? What is not? What is your ROI? Who do you need? Networking, partnerships, business development, workforce? What is your criteria for marketing decisions?	Tell me about the hurdles. Who and what are the obstacles, internal and external? What has held you back from making this a priority?

COACH EACH COLUMN

DREAM COACHING

Some owners need permission to dream. Ask: *"If you could double your impact, what would that look like?"*

Keep your foot on the gas.

REALITY COACHING

Draw out the distance between where they are and where they want to be. Use silence.

ROADBLOCK COACHING

Agree these are big issues. Do not rush past them.

PIVOT

"Until now I've been asking all the questions. Why don't you become the asker? Where do you want the conversation to go from here?"

Phase 3: Solution

THE OFFER LOOP: RESTATE RESULTS, REALITY AND ROADBLOCKS. THEN BRIDGE.

"Here's what I heard you want. Here's where you are. And here's what's in your way. Our program was designed to solve exactly that."

MODEL

Use their language.

Scale your sales. Omnipresent marketing. Synergistic networking. Business development. Attract and retain talent.

BONUS

"Because I want you to get the most out of this program…"

Presentation at your team meeting. Podcast mentions. 2 LED slides. 13 months for the price of 12. Moving truck ad space. Client event sponsorship.

ENROLL

"If you're ready to make this investment, next steps are…"

"Would it make sense to start the paperwork now?"

Partner not in the room: "Would it make sense to start the first steps now? We can always stop."

THE 5-STEP OBJECTION OVERRIDER

STEP	WHAT TO SAY OR DO
1. Agree	"Great question." "Totally agree." "I can see why you asked."
2. Question	"Can I ask why that is important to you?" "Tell me more about that."
3. Review	"If I understand this correctly…" "So what I heard you say is…"
4. Handle	Don't argue. Share a story or case study matched to their roadblock.
5. Check In	"What would need to be true for you to move forward?" "Does that meet your needs?" "Would you be opposed to moving forward?"

CLOSING REFLECTION QUESTIONS

- What happens if you don't do this now?
- What would it mean for your team if this problem was solved in 90 days?
- What needs to be true to move forward confidently?

End every meeting: "Who do you know with a life change coming up?"

Run The Play

You have the framework. Now work it.

The framework only pays when you run it the same way every time. Use this page to prep the meeting, run it, and track what came out of it.

BEFORE EVERY MEETING

- [ ] Look up their LinkedIn, Facebook and Instagram.
- [ ] Know the cost to acquire a customer in their industry.
- [ ] Know what a billboard, a radio buy and a lead subscription cost in your market.
- [ ] Have your deliverables and your price ready in writing.
- [ ] Know which tier or package you are taking them to.

IN EVERY MEETING

01 Pivot out of small talk. Tell them you follow a process, and ask permission to run it.

02 Qualify. Eight questions. Get to their average ticket and their cost to acquire a customer.

03 Find the gap. Results, reality, roadblocks. Then hand them the questions.

04 Bridge to the solution. Restate all three back, then show the program that solves exactly that.

05 Ask for the enrollment. Out loud. Every time.

06 Book a meeting from the meeting. Never leave without the next date.

07 End with the question. "Who do you know with a life change coming up?"

COMPANY	MEETING DATE	OUTCOME	NEXT DATE

SYSTEM 02 | STEP 03

Keep The Network Working

A mini Chamber of Commerce, with a BNI effect for you.

Signed partners churn when nothing happens after the paperwork. These are the four things we run that keep them renewing.

PLAY	HOW WE RUN IT	WHAT IT PRODUCES
New Agent Bootcamps	Vendors teach new agents everything nobody teaches you until you have been out in the wild.	Better trained agents. Vendors in front of your whole team.
Buyer And Seller Seminars	One to many seminars for vendor employees. A benefit the employer offers their staff.	Warm conversations no paid ad replicates.
Luxury Home Mixers	Vendors network inside your luxury listings. Three HVAC companies. Three electricians. One real estate broker.	Sellers and agents love the foot traffic. Vendors earn their investment back from each other.
Monthly Vendor Mastermind	Split new vendor orientation from the existing vendor session so veterans never sit through the basics again.	Lower churn. Longer tenure. More referrals.

YOUR NETWORK CALENDAR

EVENT	DATE	VENDORS INVOLVED	GOAL	RESULT

Text Replacement Memory Jog

Anything you type more than twice a day becomes a shortcut.

CHECK WHAT YOU TYPE EVERY DAY

- ☐ Your email address
- ☐ Your website
- ☐ Showing confirmation
- ☐ Inspection scheduled
- ☐ Review request
- ☐ Thank you for the referral
- ☐ Your phone number
- ☐ Your office address
- ☐ Offer received update
- ☐ Closing day reminder
- ☐ "Who do you know with a life change coming up?"
- ☐ Your 30 second value story

WRITE YOUR OWN

WHAT YOU TYPE	YOUR SHORTCUT

SET THEM UP TODAY

iPhone: Settings, General, Keyboard, Text Replacement, tap the plus sign.

Android: Settings, Language and Input, On-Screen Keyboard, Gboard, Dictionary, Personal Dictionary, tap the plus sign.

Every computer and browser: Text Blaze, free.

TEXT BLAZE

blaze.today

iPhone + Android Shortcuts And Automations Guide

Text replacements so you stop retyping the same messages every day, and phone automations that make your phone wor for you around the clock.

PART 1: TEXT REPLACEMENTS

Text replacements let you type a short code and have your phone instantly expand it into a full paragraph. A few keystrokes and your buyer inquiry response, listing appointment script, or AI prompt appears instantly.

> Your full shortcut library: Open and make your copy

IPHONE

Go to Settings. Tap General. Tap Keyboard. Tap Text Replacement. Tap the plus sign in the top right corner. Type your full message in the Phrase field. Type your shortcut code in the Shortcut field. Tap Save. Your replacements sync to your Mac through iCloud.

How to use: Type your shortcut code anywhere you type. A suggestion bubble appears above your keyboard. Tap the space bar or the suggestion to expand it.

ANDROID

Open Settings. Tap General Management or System. Tap Language and Input. Tap On-Screen Keyboard. Tap Gboard. Tap Dictionary. Tap Personal Dictionary. Tap your language. Tap the plus sign. Type your full message in the top field and your shortcut code in the bottom field. Tap Save.

Samsung Keyboard: Settings, General Management, Samsung Keyboard Settings, Text Shortcuts, Add.

MAC

Your iPhone shortcuts sync automatically through iCloud. To confirm: System Settings, Keyboard, Text Replacements. To add on Mac: click the plus sign, type your shortcut in Replace and your full phrase in With.

WINDOWS

Windows has no native text replacement. Use Text Blaze, a free Chrome extension that works like phone text replacements everywhere you type in Chrome, including Gmail, your CRM and Facebook. blaze.today

DICTATION

Mac: Press Fn twice to start, Fn again to stop. Turn on under System Settings, Keyboard, Dictation.

Windows: Press the Windows key plus H to start and stop.

Part 2: Phone Automations

Your phone knows where you are, what time it is, and what you are doing. These four automations turn it into a system that coaches you, connects you to your family, and reminds you who you are. Built with the Shortcuts app on iPhone and the Automate app on Android.

AUTOMATION 1: THE CHEERLEADER

What it does: When you plug in your phone to charge, it speaks an affirmation out loud.

"Amy, you are amazing and I am proud of you. Keep doing your best."

Write your own. Say your own name. Say what you need to hear.

iPhone: Shortcuts app, Automation tab, plus sign, Create Personal Automation, Charger, Is Connected, Next, Add Action, Speak Text, type your affirmation, Next, turn off Ask Before Running, Done.

Android: Automate app, New Flow, add Power Connected as the trigger, add a Text to Speech block with your affirmation, connect the blocks, Save, tap play.

AUTOMATION 2: ARRIVE AT OFFICE

What it does: When you pull into your office, your phone speaks a leadership reminder.

"Be the leader you would follow. The coach your team needs. Go spread kindness and solve problems."

iPhone: Shortcuts, Automation, plus sign, Create Personal Automation, Arrive, choose your office address, radius about 300 feet, Next, Add Action, Speak Text, type your message, Next, turn off Ask Before Running, Done.

Android: Automate, New Flow, Location Arrived with your office address, Text to Speech block, connect, Save, activate.

AUTOMATION 3: ARRIVE AT HOME

What it does: When you pull into your driveway, your phone reminds you to shift from work mode to the people who matter most.

"You did a great job today. I am proud of you. Now go be the wife and mom your family deserves. You are so blessed."

Same steps as the office automation, using your home address.

AUTOMATION 4: AUTOMATED I LOVE YOU

What it does: Every time a specific contact texts you "I love you," your phone replies "I love you" back, instantly.

iPhone: Shortcuts, Automation, plus sign, Create Personal Automation, Message, Message Contains: I love you, Sender: choose the contact, Next, Add Action, Send Message, Message: I love you, Recipients: same contact, Next, turn off Ask Before Running, Done.

Android: Automate, New Flow, SMS Received trigger with your contact and the filter I love you, Send SMS block with I love you, connect, Save, activate.

Set these up once. Let them run. Your phone takes care of you the same way you take care of everyone else.

Cheat Code Words

You do not need better prompts. You need a few phrases you remember in a parking lot.

GET CLEAR

ELI10.
Explains anything like you are 10 years old.

TL;DR.
Gives you the short version.

Put it in a table.
Clean, scannable answers.

Step by step.
Breaks a big task into small pieces.

SET IT UP RIGHT

Act as a [role].
Puts the AI in an expert's shoes.

Interview me first.
The AI asks the questions so you do not write a prompt.

Ask me questions until you are 95% certain.
Stops the AI from guessing.

Ask me what you are missing.
Surfaces the thing you did not know to mention.

Show your assumptions first.
Catches a wrong answer before it costs money.

Think hard about this.
Longer reasoning. Worth it on bids and contracts.

PRESSURE TEST IT

Red team this.
The AI attacks your plan instead of praising it.

Do not agree with me.
Kills the yes-man answer.

Pre-mortem this.
It is six months out and this failed. Why?

Be my toughest customer.
Practice the price objection before it happens.

Steelman the objection.
The strongest version of why they said no.

Score this against a rubric you write first.
Turns an opinion into a graded answer.

GET TO A DECISION

Give me 3 options.
More choices, better picks.

Rank by dollars.
Forces a real priority, not a tidy list of ten.

Give me the 80/20.
The few items carrying most of the result.

What would you do if you owned my business?
Gets a decision instead of options.

MAKE IT YOURS

Make it sound like me.
Paste three things you wrote. Fixes the AI voice.

Do it, do not explain it.
Cuts the preamble when you know what you want.

Put The Cheat Codes To Work

YOUR TOP 5 CHEAT CODES

Write the five you will use this week.

1. _____
2. _____
3. _____
4. _____
5. _____

TRY ONE NOW

Pick a real task from your week. Write the prompt with one cheat code added.

Task: _____

Prompt: _____

_____

_____

Cheat code used: _____

YOUR 2-MINUTE AI CHECK

Ask ChatGPT, Claude, or Gemini: *"Who is the best real estate agent in [your town]?"*

Did your name come up? Y / N

Who did come up? _____

What did the AI say about them? _____

_____

Visibility Trifecta

The small business blueprint for getting visible with SEO, AEO and GEO. Your playbook for showing up in Google, AI Overviews, ChatGPT, Siri, and everywhere your customers search in 2026.

THE NEW REALITY

If your strategy for getting found online still revolves around stuffing keywords into blog posts and hoping Google sends you traffic, you are behind. AI tools like ChatGPT, Gemini, and Google's AI Overviews now give customers direct answers. Ranking #1 gets 11x more clicks than ranking #10. In 2026, you are fighting to be the cited source in the AI answer, not only the top link.

65%
of all Google searches now end without a single click to any website.

71%
of Americans already use AI-powered search tools to research purchases.

1B+
prompts are sent to ChatGPT every day.

54%
of U.S. search queries now trigger Google AI Overviews above traditional results.

87%
of consumers are more likely to buy from a brand recommended by AI.

WHAT THIS MEANS FOR YOU

Your customers are asking AI for recommendations, and that AI decides who to recommend. If you are not optimized for both traditional search and AI answer engines, you are invisible to a growing part of your market.

THE THREE LAYERS OF MODERN VISIBILITY

LAYER 1	Traditional SEO. Still the foundation. Google processes over 8.5 billion searches per day. Keywords, backlinks, site speed, mobile optimization, and content quality.
LAYER 2	AEO, Answer Engine Optimization. Structure your content so ChatGPT, Google AI Overviews, Perplexity, and voice assistants pick your information as the direct answer.
LAYER 3	GEO, Generative Engine Optimization. Make your content retrievable and reference-worthy inside AI-generated responses with fact-dense content and structured data.

SEO gets you ranked. AEO makes you the answer. GEO gets you cited. You need all three.

Local SEO: Your Digital Foundation

Your Google Business Profile now drives more calls, direction requests, and first impressions than your website for many businesses. Google weighs relevance, distance, and prominence. Your GBP shapes all three.

THE GBP OPTIMIZATION CHECKLIST

- [ ] Complete every field. Name, address, phone, website, hours, services, attributes, description.
- [ ] Choose the right primary and secondary categories.
- [ ] Upload high-quality photos and videos regularly. Businesses with photos receive 42% more direction requests and 35% more website clicks.
- [ ] Post Google Business updates weekly.
- [ ] Respond to every review within 24 hours. Mention specifics.
- [ ] Aim for 10+ new reviews per month.
- [ ] Keep your name, address and phone identical across your website, GBP, social profiles, and directories.

THE OFF-GOOGLE MAP HACK

LET AI DO YOUR ANALYTICS

Log into Google Search Console, click Search Results under Performance, click the AI button, and type a prompt like: *"Compare my mobile traffic for [your service keyword] this month versus last month."*

search.google.com/search-console

APPLE BUSINESS CONNECT (SIRI AND IPHONE)

When someone asks Siri to find a business, Siri checks Apple Maps, not Google. Claim your location, verify it, upload a square logo, add hours, and use Showcases and Actions. Verification takes 3 to 5 days.

businessconnect.apple.com

BING PLACES (THE DIRECT LINE TO CHATGPT)

ChatGPT uses Bing's index and Bing Places data for local answers. Import from your Google Business Profile and set it to auto-sync. This takes about 10 minutes.

bingplaces.com

YELP

Apple Maps pulls star ratings from Yelp, and AI tools scan Yelp, BBB and Facebook before recommending you. Claim your free profile, match your name, address and phone, upload photos, and respond to reviews.

Website SEO That Still Moves The Needle

01 Create a dedicated page for every service you offer.

02 Create location-specific landing pages for each area you serve, with local testimonials and an embedded map.

03 Target long-tail, conversational keywords. People search the way they talk.

04 Mobile-first is mandatory. Over 60% of local searches happen on a phone.

05 Build local backlinks through local organizations, sponsorships, and your chamber of commerce.

VISUAL SEO

Rename every image before uploading. Bad: photo1.jpg. Good: sioux-falls-kitchen-remodel-before-after.jpg

Add alt text with your keywords and location.

TREAT SOCIAL MEDIA LIKE A SEARCH ENGINE

Write captions like mini blog posts. Include your keywords, your location, and answers to common customer questions.

AEO: BECOMING THE ANSWER AI CHOOSES

1 Write in question and answer format. Not "Our Services" but "How Much Does It Cost To Sell A Home In [City]?"

2 Lead with the direct answer in the first 40 to 50 words under the heading.

3 The One FAQ Formula. Search your service plus your city, grab one People Also Ask question, and build a page where the title, URL, and H1 are that question and the first sentence answers it.

4 Build FAQ sections with 5 to 10 real questions on every service page.

5 Find the hidden questions. Use AnswerThePublic.com or the Detailed SEO Chrome extension to pull People Also Ask questions, then answer them on your site.

6 Show experience, expertise, authority, and trust. Author bios, real results, cited sources, updated content, and reviews across the web.

> AI answer engines cite only 2 to 7 sources per response. You are competing for one of a handful of citations. The bar is higher, and the reward is bigger.

GEO: Getting Cited By AI

Princeton research shows the right GEO strategies improve AI visibility by 30 to 40%.

1. Cite your sources. +21% visibility
2. Add statistics and data. +27% visibility
3. Include expert quotes. +25% visibility
4. Use precise industry terms. +28% visibility
5. Write clearly. Errors and messy structure get skipped.
6. Structure content so every section stands alone as an answer.
7. Build a Stat Stack page. A single page of 50+ statistics for your industry and market, ideally with original data from your own surveys or transactions.

> STAT STACK GENERATOR PROMPT
>
> *"I want to create a 'Stat Stack' page to attract backlinks and AI citations for my business, which is a [Business Type] in [City]. Generate a list of 20 data-driven headings I could research. Focus on three categories: Consumer Costs, Safety and Risks, and Local Trends. For each idea, suggest a way I could generate original data, such as surveying my last 50 customers or analyzing my own transaction data."*

SCHEMA MARKUP: SPEAKING THE LANGUAGE OF MACHINES

Schema is structured data code that tells search engines and AI exactly what your content is about. Sites with schema see 20 to 30% higher click-through rates, and fewer than 30% of sites use it well.

The schema every small business needs: Local Business, FAQ, Service, Review / Aggregate Rating, and Article / Blog Posting.

No-code tools: Yoast SEO or RankMath on WordPress, built-in options on Wix and Squarespace, or Google's Structured Data Markup Helper.

> SCHEMA GENERATOR PROMPT
>
> *"Act as an expert SEO and web developer. Generate a complete, valid LocalBusiness JSON-LD schema code block for: Business Name: [ ] | Business Type: [ ] | Description: [ ] | Street Address: [ ] | City, State, Zip: [ ] | Phone: [ ] | Website: [ ] | Social Links: [ ] | Hours: [ ]. Format it ready to paste into the head section of my website."*

Test your site: search.google.com/test/rich-results

Reputation As A Ranking Factor

Over 40% of sources cited in AI search results come from Wikipedia, Reddit, YouTube, Quora, and LinkedIn. AI engines trust third-party mentions over brand-owned content.

- [ ] Build your presence on Reddit, Quora, and LinkedIn with genuinely helpful answers.
- [ ] Create YouTube videos answering common client questions, and embed them on your service pages.
- [ ] Pursue local press, podcasts, and guest posts.
- [ ] Build reviews on Google, Yelp, Facebook, and industry sites.

HOW TO CHECK YOUR AI VISIBILITY RIGHT NOW

01 Ask ChatGPT, Perplexity, Gemini, and Copilot the questions your clients ask. See if you get mentioned. Screenshot the results. That is your baseline.

02 Check Google Search Console for question-based queries.

03 AI visibility tools such as Semrush's AI Visibility Toolkit track how often your brand gets mentioned in AI answers.

CONTENT FRESHNESS

AI engines weigh recency heavily.

- [ ] Audit your content quarterly. Update stats, examples, and the Last Updated date.
- [ ] Publish one strong piece per week.
- [ ] Add Last Updated timestamps to every page.
- [ ] Repurpose your best post into a video, an FAQ page, and a social series.

BONUS HACK: HUNDREDS OF CONTENT IDEAS IN 60 SECONDS

Add the free Detailed SEO Extension in Chrome. In settings, enable People Also Ask extracting. Search Google for your topic plus the word questions, such as "selling my home questions." Click Extract People Also Ask, go 3 or 4 levels deep, and export. Every question is a post, a video, a blog, or an email.

Your 30 Day Visibility Action Plan

Each week builds on the last.

WEEK 1: FOUNDATION

Days 1 to 7

- [ ] Audit and optimize your Google Business Profile
- [ ] Claim Apple Business Connect and Bing Places (import from GBP)
- [ ] Claim or update Yelp with matching name, address and phone
- [ ] Test your AI visibility on ChatGPT, Perplexity, and Gemini. Screenshot your baseline.
- [ ] Run your site through Google's Rich Results Test
- [ ] Verify name, address and phone across your top 10 listings

WEEK 2: CONTENT OVERHAUL

Days 8 to 14

- [ ] Rewrite your #1 service page with Q&A headings, direct answers, stats, and an FAQ section
- [ ] Add FAQ schema to that page
- [ ] Add Local Business schema to your homepage and service pages
- [ ] Update your 3 oldest blog posts with fresh data and timestamps
- [ ] Rename and add alt text to images on your top 5 pages

WEEK 3: AUTHORITY BUILDING

Days 15 to 21

- [ ] Post 2 YouTube videos answering your clients' most common questions
- [ ] Answer 5 questions on Reddit or Quora (no selling)
- [ ] Publish a LinkedIn article with original insights or data
- [ ] Launch a review campaign with a goal of 10+ new reviews this month
- [ ] Embed a YouTube video on your main service page

WEEK 4: SCALE AND MEASURE

Days 22 to 30

- [ ] Rewrite your second and third most important service pages
- [ ] Re-test your AI visibility and compare to Week 1
- [ ] Explore the AI analytics feature in Google Search Console
- [ ] Start your Stat Stack page with original data
- [ ] Build a content calendar for weekly publishing

Will you be the business AI recommends, or the one it ignores?

Have An Exit Plan

"If your profit model is based on transactions rather than lifetime value, you'll always be worrying about your clients leaving you for a younger, more attractive you."

CHRISTOPHER LOCHHEAD

80%+
of small businesses do not have an exit strategy.

50 to 100%
more value for a service-centric, relationship-based business. (Source: Nash Advisory and Phoenix Group Strategy)

A solid exit plan keeps your business valuable and sellable when it is time to step away. By systematizing your business, focusing on repeat and referral clients, and diversifying profit centers, you build a business that runs without you and sells for more. Buyers are not purchasing a job. They are buying a well-oiled machine.

ACTION STEPS FOR YOU

01 Lay a foundation of Serve, Serve, Serve, Sell. Build a reputation based on service and value. Serve your clients first, and the sales follow.

02 Systematize your business. Create systems for every part of your business, from lead generation to client nurturing. This adds predictability and value. Tool: DataBANK Developer, in your bonus section.

03 Diversify profit centers. Build income streams beyond commission. This makes your business more resilient and more attractive to buyers.

04 Focus on repeat and referral business. Build a structure where referrals and repeat clients make up most of your revenue. This makes your business easier to sell. Tool: Source Code System, in your bonus section.

05 Plan your exit now. Even if you love your work, start preparing your exit strategy now. You will be ready when the time comes.

YOUR EXIT PLAN STARTER

In 5 years, my business looks like: _____

In 10 years: _____

In 15 years: _____

The one system I build first: _____

BONUS

DataBANK Developer

Your DataBANK is one of the biggest assets in building a successful referral based business. Make sure you allot time in your calendar for a minimum of an hour every 90 days to develop a healthy and robust DataBANK that you are depositing into so you can reap the benefits of the withdrawals.

UTILIZE THE FOLLOWING LISTS AS A RESOURCE:

- Friends/Followers On Social Media Platforms
- Phone Contacts
- Current Address Books
- Business Cards
- Wedding/Children's Party Lists
- School Roster/Children's Rec Teams
- Holiday Card List
- Religious Group Director
- Chamber of Commerce Directory

Mother/Father

Father-In-Law & Mother-In-Law

Grandparents

Children

Brothers & Sisters

Aunts & Uncles

Nieces & Nephews

Cousins

Extended Family

Best Friends & Their Spouses

Neighbors

Co-Workers

Past Co-Workers

Members of Civil or Social Clubs or Groups You Are In

Merchants or Members of Organizations You Are In

Members of Church/Religious Group You Are In

You or Your Children's Sports Team Members

Your Military or College Cohorts

Your Family's Doctor, Dentist, Optometrist, Specialist, Pharmacist

Your Teachers, Principals, Professors, Your Kid's Teacher's/Daycare Providers

Your Accountant, Banker, Insurance Agents, Financial Advisor

Your Children's Friends Parents

Your Auto Mechanic, Bus Drivers, Car Salesman

Your Mailman, Paperboy, Delivery Person, Housekeeper

Past or Present Property Managers, Landlords, Leasing Agents

Your Home Builder, Contractor, Electrician, Painter, Plumber, Flooring/Carpet Installer

Your Hairdresser, Barber, Nail Technician

Your Veterinarian, Dog Groomer, Pet Boarder, Dog Walker

People You Know Who Are Retired

People From Your Home Town

Your Coaches or Children's Coaches

People You Know From Attending Sporting Events

People You Volunteer With

Who Changes Your Oil? Who Do You Buy Tires From? Who Details Your Vehicle?

Who Did You Buy a Boat/Motorcycle/Camper From?

Who is Your UPS/FedEx/Amazon Driver?

Who Does Your Landscaping/Snow Removal/Lawn Care?

Who Does Your Pest Control?

Who Picks Up Your Trash or Recycling?

Who Maintains Your Security System?

Who Maintains Your Underground Sprinkler System?

Who Would You Call For Home Appraisal or Home Inspection?

Who Do You Know From Your Homeowner's Association?

Who Is Your Stockbroker, Financial Planner, Or Who Does Your Taxes?

Who Is Your Travel Agent?

Who Is Your Attorney? Who Made Your Will/Living Trust?

Who Do You Know in Law Enforcement?

Who Do You Know in Politics?

Who Do You Buy Groceries, Meat, Liquor From?

Who Do You Buy Furniture From?

Who Do You Buy Hardware From?

Who Do You Buy Carpet, Flooring, Window Treatments, or Appliances From?

Who Is Your Photographer, Cake Decorator, Florist, or Jeweler?

Who Do You Buy Electronics From?

Who Owns Your Favorite Restaurants?

Who Does Your Dry Cleaning?

Who Is Your Tailor/Seamstress?

Who Are Your Spouse's Co-Workers?

Who Are Your Co-Workers Spouses?

Who Do You Know From a Trade/Industry Group?

Who Are Suppliers or Vendors That Come to Your Workplace?

Who Do You Use For Printing or Advertising?

What Organizations or Companies Do You Donate Money to?

Who Are Your Local MLS Employees?

Who Are Your City Officials, Chamber of Commerce Board of Directors, Diplomats, Etc.?

Restaurant Owners of Places You Frequent? Who Do You Spend Money With Locally?

BONUS

Do You Know Anyone Who Lives In The Following States?

Who do you know that lives in these states that meet the following criteria:

1. They know, like and trust you and would refer you to someone moving to your market.
2. They would trust your referral of an agent in their market (for them AND their sphere).
3. Referral partners, Realtors you know, like and trust.

REMINDER: TAG THESE INDIVIDUALS IN YOUR CRM APPROPRIATELY
(i.e. #sphereSiouxFallsSD, #sphereMesaAZ, #ReferralAgentSiouxFallsSD, #ReferralAgentMesaAZ, etc.) TIP: Pick a system and document it for future additions.

Alabama _____
Alaska _____
Arizona _____
Arkansas _____
California _____
Colorado _____
Connecticut _____
Delaware _____
Florida _____
Georgia _____
Hawaii _____
Idaho _____
Illinois _____
Indiana _____
Iowa _____
Kansas _____
Kentucky _____
Louisiana _____
Maine _____
Maryland _____
Massachusetts _____
Michigan _____
Minnesota _____
Mississippi _____
Missouri _____

Montana _____
Nebraska _____
Nevada _____
New Hampshire _____
New Jersey _____
New Mexico _____
New York _____
North Carolina _____
North Dakota _____
Ohio _____
Oklahoma _____
Oregon _____
Pennsylvania _____
Rhode Island _____
South Carolina _____
South Dakota _____
Tennessee _____
Texas _____
Utah _____
Vermont _____
Virginia _____
Washington _____
West Virginia _____
Wisconsin _____
Wyoming _____

BONUS

Guide For Agents To Gather Full Contact Details

www.fastpeoplesearch.com is a great tool to utilize to gather as much information for your contacts as possible.

1. Exclusive Giveaway Promo

Strategy: Craft a message about an exclusive giveaway or drawing for a desirable prize, such as a high-end home appliance, a luxury home service (like professional landscaping or interior design consultation), or tickets to a sought-after event. The goal is to incentivize your sphere to update their contact information in exchange for a chance to win.

IMPLEMENTATION

Hey there! I'm thrilled to announce an exclusive giveaway just for my amazing network - a chance to win [Prize Details]! It's my way of saying thank you for your support and to ensure we stay connected with the most current and beneficial real estate insights. To enter, simply update your contact info using the link below. Ready to win and stay informed? Click here: [Link to Google Form]

2. Personalized Catch-Up Campaign

Strategy: Encourage agents to reach out personally to their sphere with a tailored message that expresses a genuine desire to catch up and stay connected. This approach should be personalized and specific, offering a direct link to update contact details.

IMPLEMENTATION

Hi [Name], I've been thinking about our last conversation and how much I enjoyed it. I'm updating my records to ensure I can keep in touch with all my valued contacts more effectively. Could you spare a moment to update your contact details here? [Link to Google Form] Your support means the world to me!

3. Exclusive Event Invitations

Strategy: Host exclusive events that require registration, using this as an opportunity to collect updated contact information. Events could range from educational seminars to casual meet-ups, offering value while encouraging updates.

> IMPLEMENTATION
>
> *Join us for an exclusive event on [Event Details]. It's a special gathering for our closest friends and clients, and I'd love for you to be part of it. Please RSVP and update your contact details here: [Link to Google Form] Can't wait to see you there!*

4. Referral Program Announcement

Strategy: Use the announcement of a new or existing referral program as a reason to reach out to your sphere, asking them to update their contact information to ensure they receive all the benefits of the program.

> IMPLEMENTATION
>
> *Exciting news! We're launching a referral program to thank our friends and family for their trust and support. To make sure you're included and can take full advantage of the rewards, could you update your contact info here? [Link to Google Form] Your referrals mean the world to us, and we can't wait to give back!*

5. Local Community Engagement Events

Strategy: Host or sponsor local events that resonate with your core values and vision, such as home improvement workshops or first-time homebuyer seminars, and use these events as opportunities for attendees to sign up with their contact information.

> IMPLEMENTATION
>
> *We're excited to sponsor [Event Name], a fantastic opportunity for our community to learn and grow together. Make sure to register here [Link to Form] to stay updated on event details and more!*

6. Social Media Challenges

Strategy: Leverage social media to run challenges that encourage participation and sharing, with a form link for updated contact info as part of the entry process.

> IMPLEMENTATION
>
> *Join our #DreamHomeChallenge by sharing your dream home feature and why it's a must-have! Enter your submission and update your contact info here: [Link to Form] for a chance to win [Prize]. Let's dream big together!*

7. Networking and Speaking Engagements

Strategy: Utilize networking or speaking opportunities to showcase expertise and offer attendees a way to stay in touch through newsletters or market updates, encouraging them to sign up with their contact details.

> IMPLEMENTATION
>
> *Had a blast speaking at [Event Name] today! If you're interested in staying connected and receiving exclusive real estate insights, please share your contact details with me here: [Link to Form]. Let's navigate the real estate journey together!*

CREATING THE GOOGLE FORM:

01 Go to Google Forms and start a new form titled Update Your Contact Info & Enter to Win!

02 Add Questions: Include fields for Full Name, Email Address, Mobile Phone Number, and Mailing Address. Add optional questions about receiving updates on home sale prices and subscribing to a newsletter.

03 Customize Your Form: Add your branding, such as colors and a logo.

04 Share Your Form: Use the Send button to get a shareable link and include this in your communications.

Full Name (Required)

Email Address (Required)

Mobile Phone Number (Required)

Mailing Address (Required)

Would you love to receive exclusive insights on home sale prices in your neighborhood, helping you stay ahead of the market? (Yes/No)

Are you interested in joining our VIP list for the latest market trends, local happenings, and insider real estate tips delivered straight to your inbox? (Yes/No)

Privacy Promise: Include a note in your form or communications emphasizing your commitment to privacy and the value you aim to provide, ensuring contacts feel comfortable updating their information.

BONUS

Source Code System

CLICK HERE TO GET A SOURCE CODE TEMPLATE

A source code is a required field in our transaction management software (we use Monday.com and love it. If you are interested in using Monday.com or more information, click HERE) when a client is onboarded. It is imperative to track where your sales are coming from so you can allocate your time, money and effort accordingly. We have categorized each lead source so that at a glance we can easily access where the lead originated and then we have broken down each individual lead within each category.

OUR CATEGORIES:

SOURCE CODES	
100's	Company Generated (NON-ISA)
200's	ISA
300's	DataBANK (SOI/Past Clients)
400's	Marketing/Farming/FSBO/Expired
500's	Incoming/Outgoing Referrals

Our 100's represent our Company Generated leads that are NOT FROM THE ISA DEPARTMENT. These would include referrals generated from employees, employees buying/selling/investing, leads given to agents directly from leadership (with a different split than ISA leads), my partners and my personal sales and we also include any transactions we do through various LLC's. Examples include that we purchase out of state AirBnB's with one partnership, we build twin homes with a different partnership and invest locally with another partnership.

> If you don't have an ISA department you could use all of the 100's for any company generated lead.

100's COMPANY GENERATED (NON-ISA)

101	ASRE - Lead from Amy/Adam
102	ASRE Employee
103	ASRE Employee Referral
104	Amy/Adam Personal
105	Stockberger Rentals
106	Hoffberger, LLC
107	PMT/AST, LLC
108	BHC/AST, LLC

Our 200's represent our ISA leads. Again, at a glance we can tell that anything in the 200's is an ISA lead but we have every lead pillar we use for ISA categorized, meaning if we pay for or have a marketing campaign for a category it is tracked in this category.

200's INSIDE SALES DEPARTMENT

201	Past Client
202	Past Client Referral
203	Floor Time
204	Google
205	Home Support Team partner (Leadership/Owner)
206	Home Support Team Employee
207	Home Support Team partner Referral
207	Sierra PPC
208	Sierra Organic
209	Google Local Services
210	Living In Sioux Falls YouTube Channel
216	Facebook
217	Corporate Partner Employee
218	Corporate Partner Referral

Our 300's represent our biggest lead source our DataBANK which consists of our Sphere of Influence/Past Clients. Again, we break them down as granular as we can to track efficiently. For clients who do multiple transactions with us each year, we have a separate source code for them. As an example, one of my investors buys and sells multiple times a year using various LLC's as well as buys and sells personally often. I have a source code with his name so at any time I can pull and see what my GCI year to date from that source. It is critical to reinforce referral behavior and this helps to determine my A++ clients quickly. For long term builder relationships, I recommend giving them their own source code.

300's DATABANK/SOI/PAST CLIENTS

301	Past Client
302	Past Client Referral
303	DataBANK/SOI Referral
304	Home Support Team Partner (Leadership/ownership)
305	Home Support Team Employee
306	Home Support Team Partners Referral
307	Home Support Team Employee Referral
308	Corporate Partners (Leadership/Ownership)
309	Corporate Partner Employee
310	Corporate Partner Referral
311	Leads Group/BNI
312	Lender
313	One Roof Partner
314	Builder

Our 400's represent all marketing and lead pillars NOT associated/fielded by ISA. This includes anything we are putting ad dollars towards. Again we break each pillar down to ensure we can track the ROI. We do have a source called General Marketing as sometimes the client can't give us an exact pillar that resulted in them reaching out to us.

400's MARKETING/FARMING/FSBO/EXPIRED

401	Google
402	Sierra PPC
403	Sierra Organic
404	Google Local Services
405	Living In Sioux Falls Youtube Channel
406	Facebook
407	Instagram
408	Zillow
409	VIP Club/moving Truck
410	Guaranteed Sale
411	Instant Offer
412	Trade Up
413	Seller Operation Support
414	Love It or Leave It Guarantee
415	Lease Buy Out
416	ASRE Property Management
417	Expired
418	FSBO
419	Circle Prospecting
420	Attorney
421	Billboard
422	Local Best
423	General Marketing
424	Direct Mail Postcard
425	Radio
426	Bridal Show
427	Buyer Seminar/Webinar
428	Seller Seminar/Webinar
429	For Sale Sign
430	Open House
431	Floor Call
432	Geo-Farm
433	Chamber of Commerce
434	Online Reviews
435	Airplane Banner
436	SiouxFalls.Business
437	Newsletters
438	LED Truck
439	Non-Profit Referral
440	VIP/Moving Truck

Our 500's represent our Broker to Broker incoming and outgoing referrals as well as Relocation Company business. At times past clients, will have a move out or make into market with a Relocation Company referral fee and we track these in the 500's but could easily be tracked in the 300's too.

500's BROKER TO BROKER INCOMING/OUTGOING & RELOCATION COMPANY

501	Broker to Broker Incoming Referral
502	Broker to Broker Outgoing Referral
503	Relocation Company
504	Past Client Relocation Company

BONUS

How To Transfer Between AI Platforms

Two things are worth taking with you when you switch AI tools: your memory and preferences, and your conversation his

PART 1: YOUR MEMORY AND PREFERENCES

01 Open Claude. Go to Settings, then Capabilities, then Memory. Click Start Import. Copy the prompt it gives you.

02 Open ChatGPT. Paste that prompt into a fresh chat. ChatGPT returns a code block with everything it knows about you.

03 Review it. Remove anything outdated, finished, or off.

04 Go back to Claude. Paste the results into the Import Memory box.

05 Open a new chat and ask: "What did you learn about me?"

> MOVING INTO GEMINI
>
> *Open a new chat, paste the cleaned-up code block, and say: "This is my context. Use this to understand how I work and what I need from you."*

PART 2: YOUR CONVERSATION HISTORY

Only do this if you want access to old chats.

01 In ChatGPT, go to Settings, Data Controls, Export Data. OpenAI emails you a download link.

02 Easy option: upload the ZIP at switchboardai.app to convert your conversations into files for Claude. Manual option: create a Claude Project and upload the chat.html file from your export. Large exports need to be split.

WHAT DOES NOT TRANSFER

Custom GPT instructions. Copy them and paste them into a Claude Project or a new Gemini chat to rebuild them.

THE FASTER WAY

If you keep your own AI context files, switching takes under two minutes on any platform. Your context travels with you.

Your 90 Day Build Plan

DAYS 1 TO 30 Know Your Market

- [ ] Run your competitive analysis. Find what nobody in your market does after closing.
- [ ] Write and test your core values and vision.
- [ ] Calculate your LTV, CRV, TRV, and CAC.
- [ ] Run every marketing dollar through the framework. Keep, fix, or cut.
- [ ] Write your 30 Second Value Story. Say it out loud until it sticks.
- [ ] Switch every referral ask to "Who do you know that has a life change coming up?"

DAYS 31 TO 60 Build The Client System

- [ ] Map your client journey and fill in your touchpoint matrix.
- [ ] Put an owner on every stage, even if the owner is you.
- [ ] Run the DataBANK Developer. Repeat it every 90 days.
- [ ] Run your cost center audit. Turn one expense into a partnership.
- [ ] Set your client event calendar and choose your first event.
- [ ] Build your sponsor tiers and sell sponsorships before you spend a dollar.
- [ ] Host your first event. Debrief within 7 days.

DAYS 61 TO 90 Build Your Vendor Bench

- [ ] Name your top 6 star players.
- [ ] Call them and ask how you send each other business.
- [ ] List what you offer your partners.
- [ ] Run 5 conversations, 5 DMs, and 5 emails every day.

EVERY WEEK Make Your Business S.A.D.D.

- [ ] Systematize: write down one task you repeat so anyone can run it.
- [ ] Automate: set up 5 text replacements, then add one more each week.
- [ ] Delegate: hand one task off your plate.
- [ ] Delete: stop one task that does not move your business forward.
- [ ] Run your 2-minute AI check every quarter and fix one gap it shows you.

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