DOWNLOAD

SCALE PEOPLE NOT FENCES:

Build a Referrable, Scalable & Sellable Business

BY: AMY STOCKBERGER

LIFETIME HOME SUPPORT

AMY STOCKBERGER REAL ESTATE

TABLE OF CONTENTS

1. STEAL FROM AMAZON

TURN COST CENTERS INTO PROFIT CENTERS

Amazon turns internal expenses into powerful profit centers. By following Amazon's model, take your expenses and have them paid by someone else similar to what we did with our moving truck. Vendors pay for ads on the truck which eliminated the truck costs and built brand awareness. You can do the same by identifying cost centers and transforming them into multi-functional assets that serve multiple purposes.

ACTION STEPS FOR YOU:

1. **Identify cost centers -** Look at where you spend money in your business. Analyze categories like marketing, technology, office space, and client gifts.

   Tool: Cost Center Audit Worksheet

2. **Turn cost centers into multi-functional assets** — Find ways these expenses can serve you in more than one way.

   Example: Our trucks aren't just for moving—they're marketing tools, profit generators, and community giveback pieces.

3. **Create partnerships or sponsorships** — Align with other businesses that can benefit from exposure, and let them cover the costs. Whether through branding opportunities, event sponsorships, or vendor relationships, this can turn an expense into a source of revenue.

   Tool: Sponsorship Marketing Sheet

STEP 1: Do Business with Those Who Do Business with You
Make it your mission to align your spending with businesses that actively support your business in return. This includes every service and product you use personally and professionally. Ensure every vendor, partner, and service provider you work with knows how you can help their business grow by leveraging your network.

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

STEP 2: Cost Center Audit Worksheet
Use this worksheet to map out each cost center in your business and turn it into a profit-generating, multi-functional asset.

View the Cost Audit Tables HERE.

CONCLUSION: Granular Action For Immediate Results

This isn't about vague strategies—this is about exact steps to turn your expenses into revenue streams. By co-branding, cost-sharing, adding transaction fees, and monetizing every aspect of your business, you can turn what was once a cost center into a profit-generating, multi-functional asset. Start with this worksheet, get granular with your partners, and watch your business become a lean, profit-driven machine.

2026 CLIENT EVENTS

2026 CLIENT EVENT SCHEDULE

Date	Event
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

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

AMY STOCKBERGER REAL ESTATE CLIENT APPRECIATION EVENT SPONSORSHIP AGREEMENT

The following terms & conditions are hereby incorporated into this agreement between **AS VIP, LLC (hereinafter called Amy Stockberger Real Estate) &** ________________________

Gold Event Sponsor $1,500

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

2026 Client Event Schedule

- ☐ Ice Skating @ Scheels IcePlex - xxx, 2026 - Deadline: x/x/26
- ☐ Dumpster Cleanup Days - April 11th - 12th, 2026 - Deadline: 3/6/26 (Silver Level Only)
- ☐ Date Night @ Rough Cut Social - September 17th, 2026 - Deadline: 8/7/26
- ☐ Trunk or Treat - October 24th, 2026 - Deadline: 10/24/26 (Silver Level Only)
- ☐ 21st Annual Turkey Giveaway - November 19th, 2026 - Deadline: 10/8/2026
- ☐ Home and Lifestyle - February 7th, 2027 - Deadline 01/07/2027

****Full Payment Must be Received by Postcard Mailout Date****

Signature: ______________________________ Date: ______________________

Membership Sub-Total: ____________

Tax (6.2%): _________________

TOTAL: _______________________

I, ________________, authorize Amy Stockberger Real Estate to use the payment method on file for the agreed upon amount.

______________________________ ______________________________

Customer Signature Date

Disclaimers:

I acknowledge that ACH/ EFT transactions to my account must comply with the provisions of U.S. law. I acknowledge that an ACH failure to pull funds on the 1st attempt, will be automatically set to re-pull funds on the following business day.

AMY STOCKBERGER REAL ESTATE
CLIENT APPRECIATION EVENT SPONSORSHIP AGREEMENT

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AS VIP, LLC (hereinafter called Amy Stockberger Real Estate) & ___________________________

Silver Event Sponsor $500

Attendance at Event / Advertising on LED Truck During Event / Evergreen YouTube Video of Event / Email Marketing Campaign / Social Media Marketing Campaign / 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)

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2 . HUMAN 2 HUMAN (H2H):

PROVIDE VALUE BEYOND THE TRANSACTION

To keep clients coming back, you need to provide value that extends beyond the transaction. Offering simple guarantees, perks like free use of party supplies, moving trucks, shows clients that you're committed to supporting them for life. This long-term value builds loyalty and increases repeat and referral business. Clients don't just see you as a service provider but as someone who adds value to their entire homeownership experience and life experience.

ACTION STEPS FOR YOU:

1. **Identify your sizzle** — What makes you stand out from your competition? It could be added services, perks, or guarantees that will blow your clients' socks off.

   Tool: Vision & Core Values Worksheet with Competitive Intelligence and Self-Analysis

   Tool: Vision & Core Values Template

2. **Provide lifetime value** — Show clients you're in it for the long haul. Offer services that benefit clients after the sale, like a Love It or Leave It Guarantee, Lease Buyout Program, or party equipment rentals.

3. **Walk clients across the epiphany bridge** — Help them see how you improve their life, save them time, and reduce stress. They'll realize you're the best choice for their real estate and lifestyle needs.

VISION & CORE VALUES WORKSHEET

WITH COMPETITIVE INTELLIGENCE AND SELF-ANALYSIS

****Link for a customizable Core Values and Vision Statement template can be found HERE.****
****Link for a customizable worksheet can be found HERE.****

Creating Powerful Core Values and Vision for Your Company

Why Start with Competitive Intelligence?

Before defining your Core Values, Vision, and Unique Value Proposition (UVP) it's crucial to:

1. **Analyze Your Competitors:** Understand their strengths, weaknesses, and gaps to position yourself uniquely in the market.
2. **Analyze Yourself:** Reflect on your own strengths, weaknesses, and service gaps to align your business with your audience's needs and opportunities for growth.

What is Competitive Analysis?
Competitive analysis is the process of researching and understanding your competitors to uncover their strengths, weaknesses, and market gaps. This helps you position yourself uniquely in the market and develop programs that resonate with your clients.

Why is it important?

- **Spot Market Opportunities:** Identify unmet needs or underserved clients in your area.
- **Refine Your Unique Value Proposition (UVP):** Highlight what sets you apart from competitors.
- **Build Client-Centered Strategies:** Align your programs, core values, and vision with what clients truly want.
- **Stay Competitive:** Understand emerging trends and competitors' strategies to adapt and thrive.

Step 1: Conduct a Competitive Analysis

Part 1: Identify Your Competitors

Start by listing the **top 5 real estate agents or agencies** in your market. Include their:

- **Names and Websites:** Who are they, and where can you analyze their services?
- **Visibility:** How active and prominent are they in your market?
- **Programs/Guarantees:** What programs do they offer to attract buyers, sellers, or investors?

Prompt for ChatGPT:

> "Act as a Market Analyst and Competitive Intelligence Consultant. Help me identify the top 5 real estate agents in [insert market/city], their names, websites, and programs, including UVPs such as guaranteed sales, instant offers, relocation assistance, and VIP client services."

Worksheet Section: Competitor Identification

Competitor Name	Website	Visibility (High/Medium/Low)	Common UVPs/Programs	Strengths	Weaknesses
Competitor 1					
Competitor 2					
Competitor 3					
Competitor 4					
Competitor 5					

Part 2: Common UVPs/Programs Competitors May Have

As you analyze competitors, look for these common industry programs and value propositions:

1. **Seller-Focused Programs**
    - **Guaranteed Sale Programs:** Promise to sell within a specific timeframe (e.g., 30 days) or buy the property themselves.
        - **Value Proposition:** “Your home sold in 30 days, or we’ll buy it ourselves.”
    - **Instant Offer Programs:** Provide cash-buying services for quick, hassle-free sales.
        - **Value Proposition:** "Get an instant cash offer for your home, no showings or open houses required."
    - **Flexible Commission Plans:** Offer tiered commission rates based on the level of service provided.
        - **Value Proposition:** "Customizable commission plans that fit your needs."

- **Home Prep/Improvement Services:** Provide resources like staging, repairs, or renovations with "fix now, pay later" options
  - **Value Proposition:** "Maximize your home's value with no upfront costs."
- **No Hassle Cancellation Guarantee:** Allow sellers to cancel agreements without penalties.
  - **Value Proposition:** "If you're not happy, you can cancel at any time—no strings attached."

2. **Buyer-Focused Programs**
   - **Love It or Leave It Guarantee:** Buyers can resell their home within a set timeframe if they're unhappy.
     - **Value Proposition:** "If you don't love your new home, we'll sell it for free within the first year."
   - **Lease Buyout Programs:** Help renters transition to buyers by assisting with lease terminations.
     - **Value Proposition:** "We'll help you get out of your lease and into your dream home."
   - **First-Time Buyer Concierge Services:** Provide personalized guidance, including budgeting and process explanations.
     - **Value Proposition:** "We make buying your first home stress-free and straightforward."
   - **Relocation Assistance:** Support buyers moving from other cities with virtual tours and local insights.
     - **Value Proposition:** "We make relocating seamless with tailored services to meet your needs."

3. **Investor-Focused Programs**
   - **Exclusive Off-Market Listings:** Give investors access to hidden opportunities.
     - **Value Proposition:** "Gain exclusive access to high-yield investment opportunities before they hit the market."

- **Portfolio Growth Strategies:** Offer expert advice to expand property portfolios.
  - **Value Proposition:** "Your strategic partner for maximizing ROI on every investment."
- **Property Management Services:** Provide end-to-end management, including tenant placement and maintenance.
  - Value Proposition: "We handle everything, so you can focus on growing your portfolio."

4. **Specialized Programs**
   - **Downsizing Services for Seniors:** Help seniors transition to smaller homes or assisted living.
     - **Value Proposition:** "We make downsizing simple and stress-free for retirees and their families."
   - **Military or First Responder Programs:** Offer exclusive benefits for veterans and first responders.
     - **Value Proposition:** "Honoring those who serve with exclusive real estate benefits."
   - **New Construction Home Specialist:** Focus on assisting buyers with builder negotiations and upgrades.
     - **Value Proposition:** "We're your advocate in buying a brand-new home, from construction to closing."

5. **Marketing and Technology-Focused Programs**
   - **Virtual Home Buying/Selling Programs:** Enable fully digital transactions.
     - **Value Proposition:** "Buy or sell your home 100% virtually, from anywhere in the world."
   - **Social Media Marketing for Sellers:** Use targeted campaigns to reach buyers.
     - **Value Proposition:** "Your home marketed to the right buyers on the platforms they use most."

- **24/7 Communication Guarantee:** Promise round-the-clock availability.
  - **Value Proposition:** "Your questions answered, anytime—day or night."

6. **Educational and Value-Added Services**
   - **Buyer & Seller Workshops:** Offer free events to educate potential buyers and sellers.
     - **Value Proposition:** "We simplify homebuying with educational events tailored for you."

Example Programs to Look For

Category	Programs	Example Value Proposition
Seller-Focused	Guaranteed Sales Programs	"Your home sold in 30 days, or we'll buy it ourselves."
	Instant Offer Programs	"Get an instant cash offer for your home, no showings required."
	Flexible Commission Plans	"Customizable commission plans that fit your needs"
	Home Prep Services	"Maximize your home's value with no upfront costs."
	No Hassle Cancellation Guarantee	"If you're not happy, you can cancel at any time - no strings attached."
Buyer-Focused	Love It or Leave It Guarantee	"If you don't love your new home, we'll it for free within the first year."
	Lease Buyout Program	"We'll help you get out of your lease and into your dream home."
	First-Time Buyer Concierge	"We make buying your first home stress-free and straightforward"
	Relocation Assistance	"Seamless moving support tailored to your needs"

Category	Programs	Example Value Proposition
Investor-Focused	Exclusive Off-Market Listings	"Gain exclusive access to high-yield investment opportunities before they hit the market."
	Portfolio Growth Strategies	"Your strategic partner for maximizing ROI on every investment."
	Property Management Services	"We handle everything, so you can focus on growing your portfolio."
Specialized	Downsizing Services for Seniors	"We make downsizing simple and stress-free for retirees and their families."
	Military/First Responder Programs	"Honoring those who serve with exclusive real estate benefits"
	New Construction Home Specialist	"We're your advocate in buying a brand-new home, from construction to closing."
Tech-Focused	Virtual Home Buying Programs	"Buy or sell your home 100% virtually, from anywhere in the world."
	Social Media Marketing for Sellers	"Your home marketed to the right buyers on the platforms they use most."
	24/7 Communication Guarantee	"Your questions answered, anytime—day or night."
Educational and Value-Added Services	Buyer & Seller Workshops	"Buy or sell your home 100% virtually, from anywhere in the world."

Part 3: Identify Market Gaps

After analyzing competitors, pinpoint areas where they fall short.

Examples:

- No first-time buyer services.
- Lack of client retention programs like VIP Client Services or Lifetime Home Support™.
- Minimal focus on eco-friendly homes or relocation assistance.

Step 1: Prompt for ChatGPT:

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

Worksheet Section: Market Gaps

Market Gap	Opportunity for Differentiation

Step 2: Self-Analysis - Strengths, Weaknesses, Gaps

Why Analyze Yourself?

This step ensures that your Core Values, Vision, and UVP are grounded in self-awareness. By organizing your strengths, weaknesses, and gaps, you can align your strategy to better serve clients and grow your business.

Steps for Self-Analysis

- **Review Your Online Reviews:** Gather all your online reviews from platforms like Google Business Profile (GBP), Zillow, or Yelp. Copy and paste these into a Google Doc.

ChatGPT Prompt:

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

Incorporate Competitive Insights:

- **Reference your competitive analysis to see how your business compares to competitors.**
- **Gather Direct Feedback from Buyers, Sellers, Non-Buyers, and Non-Sellers:** See Step 5: Feedback and Growth for detailed instructions.

Prompts for Self-Analysis

Prompt 1: Self-Strengths Analysis

"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?

Prompt 2: Weakness Identification

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

Prompt 3: Identifying Gaps

"Act as a Market Analyst. Based on the competitive landscape and my description of my services, help me identify gaps in my offerings. What new programs or skills should I develop to stand out in my market?"

Self-Analysis Worksheet

Worksheet Instructions:

1. **Describe Your Business:** Write a clear and concise summary of your real estate services, highlighting what you offer and how you interact with clients.
2. **Input Your Competitive Analysis Findings:** Reference your earlier competitive analysis to see how your business compares to competitors.
3. **Review Client Feedback:** List common themes from client reviews or testimonials to identify strengths or areas for improvement.

Example Analysis

Category	Key Findings	Source (Business Description, Client Feedback, Competitor Insights)	Action Plan
Strengths	Buyers value my quick communication.	Feedback from Reviews and Clients	Promote this in marketing and initial consultations.
Weaknesses	Some clients felt I lacked relocation services.	Feedback from Reviews and Non-Buyers	Develop a relocation program and market it prominently.
Gaps	Clients request post-sale support like moving services.	Feedback from Sellers	Create a VIP loyalty program to address this need.

Blank Self-Analysis Table

Category	Key Findings	Source (Business Description, Client Feedback, Competitor Insights)	Action Plan
Strengths			
Weaknesses			
Gaps			

Step 3: Define Core Values

Why Create Core Values

Your Core Values provide the foundation for how you conduct business and build trust with your clients. Incorporate insights from client reviews and feedback into your Core Values to ensure they directly address what clients value most. They:

- Reflect your strengths and UVP.
- Differentiate you from competitors.
- Solve your audience's pain points.

How to Define Core Values

1. **Use Your Analysis Findings**
   - Leverage your strengths, weaknesses, and gaps to craft values that reflect your unique strengths and address client needs.
2. **Focus on Differentiation**
   - How do you solve client pain points better than competitors?
3. **Be Clear and Actionable**
   - Write values that are specific, meaningful, and demonstrable.

Prompts for Core Values

Prompt for ChatGPT

> "Acting as a Core Value Consultant and Based on my competitive analysis, self-analysis, and client reviews, help me define Core Values that highlight my strengths, address client pain points, and differentiate me from competitors."

Core Values Worksheet

Example Core Values

Core Value	Description	How It Solves Client Problems
Loyalty Beyond the Sale	We commit to serving clients long after the transaction.	Many agents disappear after closing; we stay involved with ongoing support programs like Lifetime Home Support™.
Tailored Support	We design solutions that meet each client's unique needs.	Real estate can feel one-size-fits-all; we offer customized programs like concierge services and flexible listings.

Blank Core Values Table

Core Value	Description	How It Solves Client Problems

Step 4: Craft Your Vision Statement

Why Create a Vision Statement?

Your Vision Statement is your "North Star". It:

1. Defines where you want your business to go.
2. Communicates your long-term goals and aspirations.
3. Aligns with your UVP and Core Values.

How to Create a Vision Statement

Step 1: Reflect on the Future

- Where do you want your business to be in 5–10 years?
- What impact do you want to make on your clients and community?

Step 2: Keep It Client-Focused

- Your vision should reflect how you solve client problems and create value.

Step 3: Write and Refine

- Keep it concise (1–2 sentences).
- Share it with trusted advisors or clients for feedback.

Step 4: Prompts for Vision Statement

Prompt for ChatGPT (Act as a Vision Strategist)

> “Using my self-analysis and core values, help me craft a Vision Statement that reflects where I want my real estate business to go, my UVP, and the problems I solve for my clients.”

Example Vision Statement

Draft Vision Statement	Feedback/Refinements	Final Vision Statement
To help clients buy or sell homes.	Too vague—focus on UVPs and goals.	To be the most trusted real estate partner, delivering tailored solutions, lifetime support, and innovative programs.

Blank Vision Statement Table

Draft Vision Statement	Feedback/Refinements	Final Vision Statement

Step 5: Feedback and Growth

Why Gather Feedback?

Feedback from buyers, sellers, and non-buyers/sellers provides actionable insights to:

- Identify what resonates most with clients.
- Address barriers and objections.
- Develop targeted FAQs and marketing strategies.

Steps for Feedback and Growth:

1. **Dive into Buyer/Seller Insights:** Reach out to past clients to learn why they chose you.
2. **Learn from Non-Buyers/Non-Sellers:** Ask what hesitations prevented them from working with you.
3. **Consolidate Findings:**
4. **Leverage ChatGPT for analysis:** Use ChatGPT to summarize insights and generate FAQs.

Prompt for ChatGPT: FAQ Creation

> "Based on the feedback summary, create a list of FAQs addressing buyer/seller motivations and non-buyer/seller objections. Include clear, client-focused responses for each FAQ."

Final Checklist

1. Competitive Analysis Completed.
2. Online Reviews and Feedback Analyzed.
3. Self-Analysis Worksheet Completed.
4. Core Values Defined.
5. Vision Statement Created.
6. FAQs and Marketing Updated Based on Feedback.

****Link for a customizable Core Values and Vision Statement template can be found HERE.****

****Link for a customizable worksheet can be found HERE.****

VISION STATEMENT

SERVING CLIENTS & OUR TEAM
BY BUILDING THEM A BIG, JUICY LEGACY
THROUGH LIFETIME HOME SUPPORT™

OUR CORE VALUES

① RELATIONSHIP BASED

② REPEATABLE EXCELLENCE

③ COMMUNICATION^3

④ BOLDLY UNIQUE

⑤ CONTINUOUS IMPROVEMENT

RELATIONSHIP BASED

- Lifetime Home Support™
- Building Big Juicy Legacies for Clients & Team
- Community Giveback

REPEATABLE EXCELLENCE

- System Centric
- Client Focused
- Team-arage Model

COMMUNICATION^3

- More Important than Location, Location, Location
- Overcommunication is the Standard
- Seasons of the Contract Videos

BOLDLY UNIQUE

- Bold Marketing & Unique Advertising
- From Planes to LED Mobile Digital Truck to Inside & Outside Sales Teams
- Program & Strategy for Each Stage of Buying & Selling

CONTINUOUS IMPROVEMENT

- Superpower of NOT Living in Fear
- Ph.D's in Failing FORWARD
- We Don't Lose, We Learn

3. BE A (PROFITABLE) SUPER CONNECTOR

You are already your clients' most trusted resource. Every referral you give a vendor for free is revenue you are leaving on the table.

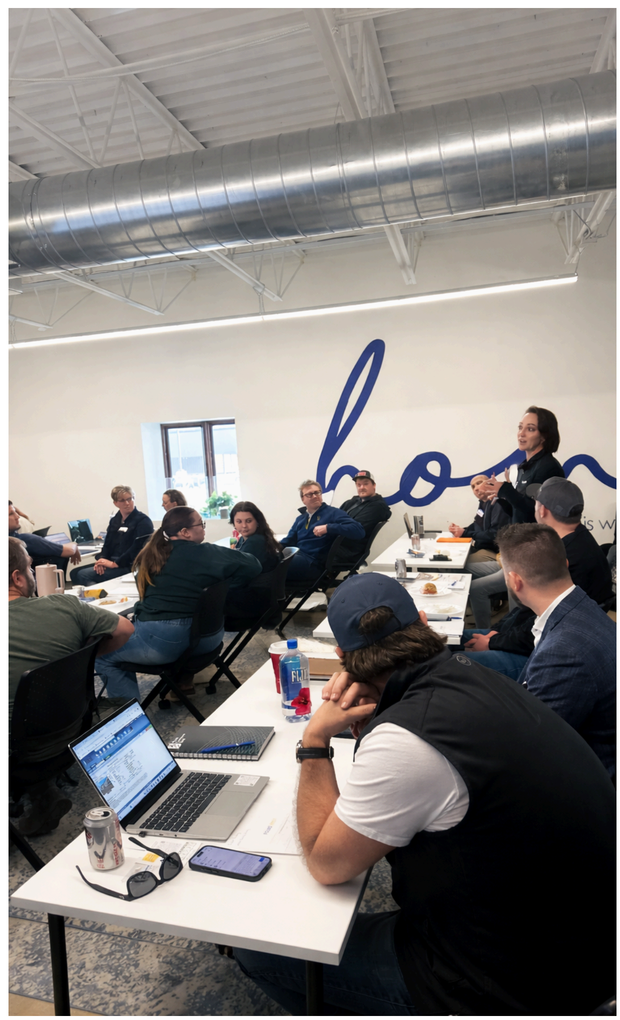
Our Home Support Team Partner program changes that. 100+ partners. $3,500 minimum a year each and a maximum tier of $7,500. Revenue before a single transaction closes. And a referral engine that runs itself.

ACTION STEPS FOR YOU:

1. **Build your Super Connector program.** Start with the Home Support Team Partner Recruiting List in your workbook. It gives you the top industries, the pitch framework, and the onboarding process.

   Tool: Use the Home Support Team Partner Recruiting List for the best industries that work with this type of program.

   Tool: AI Tools for Building a Profitable Vendor Network



2. **Know your number before you recruit your first partner.** Set your pricing and project your annual revenue so you walk into every vendor conversation with confidence, not a favor.

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 can 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 dramatically from contract to close to year three of homeownership. If you recruit based on timing, you become indispensable at every stage, not just at closing.

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 immediately after closing. Those are the relationships that generate the fastest referrals back to you. Share this table with your team so everyone recruits with the same priorities.

2. Local Vendor Finder Prompt

Why this matters: You do not have time to Google every vendor category in your market, evaluate reviews, and compile contact info from scratch. This prompt does that work in seconds. It is not a replacement for vetting, but it 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 simple spreadsheet. Then cross-reference against vendors your past clients have mentioned positively. That overlap is your priority outreach list. For team leaders, assign this prompt to an admin and have a full starter list built in one afternoon.

3. Vendor Fit Scoring Prompt
Why this matters: Not every vendor belongs in your program. One bad vendor damages your reputation with your client. You need a consistent standard for who gets in and who does not. This prompt removes the guesswork and gives you a defensible, repeatable vetting process.

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 threshold before any vendor enters your program. If you are running a paid vendor program like Lifetime Home Support, this protects the value of your network and gives you a professional reason to decline vendors who do not meet the bar. Document your score**s so you have a record when it is time to renew or remove partners.**

4. Outreach Message Prompt
Why this matters: Most agents approach vendors as a favor. You are giving them referrals out of the goodness of your heart. That framing leaves money on the table and sets up a one-sided relationship. This prompt opens every conversation as a business partnership, reciprocal from the first message.

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: Customize the output with one specific detail about their business before you send it. A reference to a recent review, a project you noticed, or a mutual connection. That one personal line is the difference between a message that gets a response and one that gets ignored. For teams, build this into your outreach sequence and track response rates by vendor category.

5. **Marketing Calendar Starter Prompt**

Why this matters: Your vendor program only generates referrals if your vendors stay engaged with your brand. Out of sight means out of mind. A monthly calendar keeps the relationship warm, gives your vendors visibility they value, 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. The calendar should not live in your head. It should live in a system. 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. Double down on those relationships. Scale back on the ones that are not reciprocating.

The agents who build the most referrable businesses do not have better relationships. They have better systems for maintaining them. These prompts are your system. Run them consistently and your vendor network becomes one of the most profitable and lowest-cost lead pillars in your business.

HOME SUPPORT TEAM RECRUITING LIST

Accounting/Bookkeeping ______________________________

Advertising ______________________________

Air Duct Cleaning ______________________________

Alarm Systems ______________________________

Architect/Engineering ______________________________

Attorney/Paralegal ______________________________

Auto Repair/Sales ______________________________

Banking ______________________________

Bat Removal ______________________________

Bath Remodeling ______________________________

Blinds/Window Treatments ______________________________

Bounce Houses ______________________________

Broadcasting ______________________________

Business Consulting ______________________________

Cabinet Sales ______________________________

Carpet Cleaning Services ______________________________

Carpet/Flooring Sales ______________________________

Catering ______________________________

Cell Phone Sales ______________________________

Chiropractic ______________________________

Cleaning Services ______________________________

Commercial Real Estate ______________________________

Concrete Contractors ______________________________

Cosmetologist/Hair ______________________________

Closet & Garage Organization ____________________

Day Care ____________________

Decking Contractors ____________________

Delivery ____________________

Dentists ____________________

Designer ____________________

DJs/Entertainment ____________________

Digital Marketing ____________________

Electricians ____________________

Entertainment Venue Owner ____________________

Employment Service ____________________

Epoxy Flooring ____________________

Exterminator Services ____________________

Facials ____________________

Fencing ____________________

Finance & Wealth Management ____________________

Financial Advising/Consulting ____________________

Fireplace Sales & Installation ____________________

Flooring Sales ____________________

Food Truck ____________________

Furniture Sales ____________________

Garage Doors ____________________

Garbage, Recycling, Roll Off Dumpsters ____________________

General Contracting ____________________

Gutters/Downspouts ____________________

Gyms ____________________

Handyman Services ____________________

Hair Salons ____________________

Health & Wellness ____________________

Household Appliances, Services & Repair ____________________

Home Building ____________________

Home Decor ____________________

Home Improvement & Repair Services ____________________

Home Inspection ____________________

Home Security ______________________________

Home Storage Design ______________________________

Home Warranty ______________________________

Home Warranty ______________________________

Hotels ______________________________

HVAC Services ______________________________

Insurance

Health ______________________________

Life ______________________________

Property ______________________________

Casualty ______________________________

Business ______________________________

IT/Information Technology ______________________________

Jewelers ______________________________

Labels ______________________________

Landscaping/Lawn Care ______________________________

Lawyer Services ______________________________

Life Coach ______________________________

Lighting ______________________________

Locksmithing ______________________________

Massage ______________________________

Mattress Sales ______________________________

Mortgage Lender ______________________________

Moving Company ______________________________

Nail Care ______________________________

Nutrition ______________________________

Office Equipment ______________________________

Painting Services ______________________________

Party ______________________________

Pest Control ______________________________

Pet Grooming Services ______________________________

Pet Supplies & Nutrition ______________________________

Pet Waste Removal ______________________________

Photography ____________________

Plumbing Services ____________________

Power Washing Services ____________________

Printing Company ____________________

Promotional Items and Marketing Materials ____________________

Radon Mitigation ____________________

Repair/Maintenance ____________________

Residential Real Estate ____________________

Retail Products ____________________

Restaurants ____________________

Roofing Services ____________________

Siding Contractors ____________________

Signage ____________________

Skin Care ____________________

Snow Removal ____________________

Stockbroker ____________________

Title/Closing/Escrow Services ____________________

Travel Agent ____________________

Tree Removal/Pruning ____________________

Underground Fencing ____________________

Vinyl & Vehicle Graphics ____________________

Water/Fire Restoration ____________________

Waste Management ____________________

Web Design ____________________

4. CHANGE YOUR QUESTION

The way you ask for referrals can make all the difference. Instead of asking, "Do you know anyone who wants to buy or sell a house?"—a question that rarely yields results—ask about life changes. People going through major transitions (getting married, divorced, becoming empty nesters) typically have a housing need lagging behind. This subtle change in your approach encourages deeper conversations and leads to more opportunities.

ACTION STEPS FOR YOU:

ASK THIS:

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

DON'T ASK:

"Do you know of anyone who wants to buy or sell a house?"

5. MAKE YOUR BUSINESS S.A.D.D.

Systemize. Automate. Delegate. Delete.

If you want a referrable, scalable, and sellable business, you cannot avoid systems. Everything in your business needs to run through one filter. Can it be systemized? Can it be automated? Can it be delegated? Or should it just be deleted? The assets in this section give you the exact tools we use to run a leaner, smarter, more profitable business.

ACTION STEPS FOR YOU:

1. **Shortcuts and Automations Guide: iPhone + Android** Text replacements and phone automations that save you hours every week. Includes the 26 agent shortcuts, four power automations, and step-by-step setup for both iPhone and Android.

2. **Industry Events Project: Claude + ChatGPT Setup Guide** Turn every event you attend into a strategic asset. Includes the Goals Foundation File voice prompt to build your goals in 10 minutes on your phone, the full project setup for both platforms, and the trigger prompt that cross-references everything you captured against your 90-day rocks and long-range vision with an EA-ready hand-off list.

BONUS: Here is a pre-built Industry Event Intelligence System to quickly get you a checklist for this event.

3. **Profitable Client Event Framework Build the Calendar**. Cash Flow the Connection. A systemized framework for running client events that pay for themselves. Includes the cash flow rule, post-event debrief framework, and the sponsorship tier structure you saw in strategy one.

4. **Create a leave-behind that resonates with kids -** This could be a fun activity book that keeps kids entertained while parents focus on major financial decisions and builds brand loyalty at a young age.

5. **Implement my Clean Kids Club Listing Agreement** to offer kids a role in keeping the house tidy, which helps parents and makes the selling process smoother.

   Tool: Clean Kids Club Listing Agreement

SHORTCUTS AND AUTOMATIONS GUIDE

IPHONE + ANDROID

This section covers two things. How to set up text replacements so you stop retyping the same messages every day. And how to automate your phone so it becomes a tool that works for you around the clock, including a personal cheerleader that fires off exactly when you need it most.

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 entire buyer inquiry response, listing appointment script, or AI prompt appears instantly.

Your full shortcut library lives here. Open it, copy each phrase, and set it up using the instructions below.

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.

Repeat for each shortcut. Your replacements sync automatically to your Mac through iCloud. Once set up on your iPhone they are available on your Mac keyboard instantly.
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 instantly.

ANDROID

Open your Settings app. Tap General Management or System depending on your device. Tap Language and Input. Tap On-Screen Keyboard. Tap Gboard. Tap Dictionary. Tap Personal Dictionary. Tap your language. Tap the plus sign in the top right corner. Type your full message in the top field. Type your shortcut code in the bottom field. Tap Save.
How to use: Type your shortcut code anywhere you type. Your full phrase appears as a suggestion above your keyboard. Tap it to expand.
If your phone uses Samsung Keyboard: Open Settings. Tap General Management. Tap Samsung Keyboard Settings. Tap Text Shortcuts. Tap Add. Enter your shortcut and full phrase. Tap Add to save.

MAC

Your iPhone shortcuts sync to your Mac automatically through iCloud. To confirm: Open System Settings. Click Keyboard. Click Text Replacements. Your iPhone shortcuts will already be there.
To add directly on Mac: Click the plus sign at the bottom left. Type your shortcut in the Replace column. Type your full phrase in the With column. Press Enter.

WINDOWS

Windows does not have a native text replacement system. Use Text Blaze. Text Blaze is a free Chrome extension that works exactly like phone text replacements on any Windows computer. Create your shortcuts once and they work everywhere you type in Chrome including Gmail, your CRM, Facebook, and any web based tool.

Download here: blaze.today
Once installed, create a free account. Add your shortcuts using the same codes from your phone. Type the code anywhere in Chrome and it expands instantly.

DICTATION
Dictation lets you speak and your computer types for you. Faster than typing for long messages. Works anywhere you write.

ON MAC: Press Fn twice to activate. A microphone icon appears. Speak clearly. Press Fn again to stop. To turn on: System Settings, Keyboard, toggle Dictation on.

ON WINDOWS: Press the Windows key plus H. A toolbar appears at the top of your screen. Speak and your words appear where your cursor is. Press Windows key plus H again to stop.

COPY AND PASTE
On iPhone: Tap and hold the text. Tap Select All. Tap Copy. Go where you want to paste. Tap and hold. Tap Paste.

On Android: Tap and hold the text. Drag handles to select. Tap Copy. Go where you want to paste. Tap and hold. Tap Paste.

On Mac: Command C to copy. Command V to paste.

On Windows: Control C to copy. Control V to paste.

PART 2: PHONE AUTOMATIONS
Your phone knows where you are, what time it is, and what you are doing at every moment. Most agents never use that. These four automations turn your phone into a system that coaches you, connects you to your family, and reminds you who you are exactly when you need it.

These are built using the Shortcuts app on iPhone and the Automate app on Android.

AUTOMATION 1: THE CHEERLEADER
What it does: When you plug your phone in to charge, your phone speaks an affirmation out loud to you.

Here is how I use it. Every time I plug my phone in to charge, my phone says:

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

Write your own version. Make it specific to you. Say your own name. Say what you need to hear.

It never hurts to have somebody remind you who you are.

ON IPHONE

Open the Shortcuts app. Tap the Automation tab at the bottom. Tap the plus sign. Tap Create Personal Automation. Scroll down and tap Charger. Select Is Connected. Tap Next. Tap Add Action. Search for Speak Text. Tap Speak Text. Tap the text field and type your affirmation exactly as you want it spoken. Tap Next. Turn off Ask Before Running. Tap Done.

Your phone will now speak your affirmation out loud every time you plug it in to charge.

ON ANDROID

Download the Automate app from the Google Play Store. Open Automate. Tap New Flow. Tap the plus sign to add a block. Search for Power Connected. Add it as your trigger. Add a new block. Search for Text to Speech. Type your affirmation in the text field. Connect the Power Connected block to the Text to Speech block. Tap Save. Tap the play button to activate.

AUTOMATION 2: ARRIVE AT OFFICE
What it does: When you pull into your office location, your phone speaks a leadership reminder out loud.

Here is how I use it. Every time I pull into the office my phone says:

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

Write your own version. What do you need to hear before you walk through that door?

ON IPHONE
Open the Shortcuts app. Tap Automation. Tap the plus sign. Tap Create Personal Automation. Tap Arrive. Tap Choose under Location. Search for your office address and select it. Set the radius to around 300 feet. Tap Next. Tap Add Action. Search for Speak Text. Tap Speak Text. Type your message in the text field. Tap Next. Turn off Ask Before Running. Tap Done.

ON ANDROID
Open the Automate app. Tap New Flow. Add a block and search for Location Arrived. Enter your office address and set a trigger radius. Add a Text to Speech block. Type your message. Connect the blocks. Save and activate.

AUTOMATION 3: ARRIVE AT HOME
What it does: When you pull into your driveway, your phone speaks a reminder to shift from work mode to the people who matter most.
Here is how I use it. Every time I pull into my driveway my phone says:

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.

Write your own version. Who is waiting for you when you get home? What do you need to hear to show up for them?

ON IPHONE
Follow the same steps as the office automation above. This time select your home address as the location. Type your home arrival message in the Speak Text field. Turn off Ask Before Running. Tap Done.

ON ANDROID
Follow the same steps as the office automation above using your home address as the trigger location.

AUTOMATION 4: AUTOMATED I LOVE YOU
What it does: Every time a specific contact texts you the words "I love you" your phone automatically replies with "I love you" back. The response fires instantly without you touching your phone.

You set it up once. It runs forever.

Here is how I use it. I set it up so that every time my husband texts me I love you my phone automatically sends it right back to him. He never goes without hearing it back. Even on my hardest days. Even when I am slammed. The system has me covered.

You pick the contact. A spouse. A kid. A parent. Anyone whose I love you deserves one right back every single time.

This is also the automation that got the biggest laugh in the room. Because yes, it sounds a little crazy. And yes, it works. That is between you and your conscience.

ON IPHONE
Open the Shortcuts app. Tap the Automation tab at the bottom. Tap the plus sign. Tap Create Personal Automation. Tap Message. Under the Message Contains field type: I love you. Under Sender tap Choose and select the contact you want this to trigger for. Tap Next. Tap Add Action. Search for Send Message.

Tap Send Message. In the Message field type: I love you. In the Recipients field select the same contact. Tap Next. Turn off Ask Before Running. Tap Done..

Your phone will now automatically reply I love you every time that person sends you those words.

ON ANDROID
Download the Automate app from the Google Play Store. Open Automate. Tap New Flow. Tap the plus sign. Search for SMS Received. Add it as your trigger block. In the settings for that block enter your chosen contact and set the message filter to: I love you. Add a new block. Search for Send SMS. Type your message: I love you. Enter your contact's phone number as the recipient. Connect the SMS Received block to the Send SMS block. Tap Save. Tap the play button to activate.

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

Phone Shortcuts/Text Replacements

INDUSTRY EVENTS PROJECT

Set It Up Once. Use It Every Time You Come Home From an Event.

SERVE. SERVE. SERVE. SELL.

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 a folder of downloaded 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 exactly what to do with every single thing you learned.

SECTION 01: BEFORE YOU BUILD THE PROJECT

The Industry Events Project only works when it knows what you are building toward. The first thing you need to upload is your Goals Foundation File. This tells the AI what your 90-day rocks, 1-year plan, 3-year picture, and 10-year target are.

Already have your goals? Upload them directly and skip to Section 04. Make sure your file includes all four horizons. Save it as Goals.txt or Goals.pdf.

Do not have them yet? You can do this in 10 minutes right now. Open Claude on your phone, hit the microphone, and talk. Use the voice prompt in Section 02. Claude structures it into your Goals Foundation File on the spot.

SECTION 02: BUILD YOUR GOALS FILE IN 10 MINUTES

Open Claude on your phone. Tap the microphone. Read this prompt or paste it in and let Claude run the interview. Answer the questions out loud. At the end Claude produces your formatted Goals Foundation File ready to upload.

GOALS FOUNDATION FILE PROMPT — copy and paste this into Claude:

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. Do not summarize as you go. Just ask, listen, and move forward.

ASK ME THESE IN ORDER:

1. What are the 3 to 7 most important things your business needs to accomplish in the next 90 days? These are your Rocks. Name them specifically. 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 formatted with these exact section headers:

90-DAY ROCKS | 1-YEAR PLAN | 3-YEAR PICTURE | 10-YEAR TARGET | WHY I AM BUILDING THIS

AFTER I ANSWER ALL FIVE, PRODUCE MY GOALS FOUNDATION FILE formatted with these exact section headers:

90-DAY ROCKS | 1-YEAR PLAN | 3-YEAR PICTURE | 10-YEAR TARGET | WHY I AM BUILDING THIS

SECTION 03: SET THESE CALENDAR REMINDERS RIGHT NOW

The project only works if the goals file is current. An outdated goals file means the AI is cross-referencing what you learned against where you used to be, not where you are going. Set these two reminders before you do anything else.

REMINDER 1 — Every 90 Days Reset your rocks. Update your Goals.txt file. Re-upload it to your Industry Events project in both Claude and ChatGPT. Takes 10 minutes. Set as: Recurring every 90 days.

REMINDER 2 — 48 Hours Before Any Event Check that your goals file is current before you walk into any event, mastermind, or seminar. If it is not updated, update it first. The AI cannot cross-reference what you learned against goals you no longer have. Set as: Every event, every time.

THE RULE: Your AI is only as smart as the last time you updated your goals file. A goals file that is six months old is working against you, not for you. Update it every 90 days minimum. Update it before every event.

SECTION 04: SET UP YOUR PROJECT IN CLAUDE

1. Go to Claude.ai and click Projects in the left sidebar. Available on Claude Pro, Max, Team, and Enterprise plans.
2. Click + New Project and name it: Industry Events | Goals Command Center

3. Click Project Instructions and paste the full instruction block from Section 06. This trains Claude on the 9 output buckets, the S.A.D.D. filter, and how to process everything you upload.
4. Upload your Goals.txt file to the project. Click the upload icon inside the project. This file stays here permanently and is referenced every time you add new event content.
5. For every event: click + New Chat inside the project. Name the thread: Event Name | City | Month Year. Example: Girls with Grit | Austin | April 2026. This named thread is your event folder.
6. Upload everything you captured from the event into that conversation. Photos of slides, downloaded assets, PDFs, workbooks, voice notes, business cards described or photographed. Everything.
7. Paste the trigger prompt from Section 07 and go. Claude reads your goals, reads your event content, and produces your full Event Intelligence Report.

SECTION 05: SET UP YOUR PROJECT IN CHATGPT

1. Go to ChatGPT.com and click Projects in the left sidebar. Available on ChatGPT Plus, Pro, and Team plans.
2. Click + New Project and name it: Industry Events | Goals Command Center
3. Click the project name and find Customize or Instructions. Make sure you are inside the project settings panel, not a regular chat.
4. Paste the full instruction block from Section 06. Same instructions as Claude. The project logic is identical on both platforms.
5. Upload your Goals.txt file to the project files area. ChatGPT references uploaded project files across all conversations inside the project. Upload once, it stays.
6. For every event: click + New Chat inside the project. Rename the thread: Event Name | City | Month Year. To rename: hover over the conversation title in the sidebar and click the pencil icon.

7. Upload your event content and paste the trigger prompt from Section 07. ChatGPT processes everything the same way. Same trigger prompt works on both platforms.

SECTION 06: PROJECT INSTRUCTIONS — paste into Claude and ChatGPT Project:

Industry Events | Goals Command Center

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. It contains my 90-day rocks, 1-year plan, 3-year picture, and 10-year target. Reference it every time. Every output must connect back to these goals.

WHEN I UPLOAD EVENT CONTENT

1. Inventory everything: notes, slides, assets, PDFs, business cards, frameworks, prompts, contacts.
2. Run every item through S.A.D.D.: Systemize, Automate, Delegate, or Delete.
3. Apply the Juice Worth the Squeeze check: is the effort proportionate to the return given my current goals?
4. Sort every item into one of the 9 output buckets.
5. Produce the full Event Intelligence Report.

THE 9 OUTPUT BUCKETS BUCKET 1 - 90-DAY ACCELERATORS: Items that speed up a goal already in my current 90-day rocks. Highest priority. BUCKET 2 - NEXT 90-DAY CANDIDATES: Not relevant now. Worth adding to my next 90-day planning session. BUCKET 3 - 1-YEAR GOAL ADDITIONS: Aligned with my 1-year plan but needs more runway. BUCKET 4 - LONG RUNWAY (3 or 10 Year): Belongs in a longer horizon. Label which one.

BUCKET 5 - PARKING LOT: Too good to delete. No current home. Review at next 90-day reset. BUCKET 6 - EA / VA READY: Hand off directly. Format as clear task descriptions with all context included. BUCKET 7 - TEAM SHARE: Worth bringing to agents or staff. Include delivery recommendation. BUCKET 8 - FOLLOW-UP CONTACTS: Every business card and connection. For each: Name, Company/Role, Why They Matter, CRM Action, Deadline. BUCKET 9 - RESOURCES TO RESEARCH: Books, tools, platforms mentioned. Flag anything goal-aligned.

OUTPUT FORMAT EVENT SUMMARY: Event name, date, top 3 themes, ROI rating (High / Medium / Low) BUCKETS 1 through 9 in order EA-READY SUMMARY: One clean list of all delegatable tasks formatted for immediate hand-off. Zero follow-up questions needed.

STYLE RULES Direct. Specific. No fluff. Every item must connect to my goals or get flagged for deletion. Do not pad the report.

SECTION 07: THE TRIGGER PROMPT — paste after uploading event content

1. I just got back from [EVENT NAME] in [CITY], [DATE]..
2. 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.
3. Run every action item through the S.A.D.D. filter and the Juice Worth the Squeeze check before sorting.
4. 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.
5. Flag my top 3 highest-priority actions across all buckets.

End with the EA-Ready Summary formatted so I can hand it directly to my EA or VA with no additional explanation.

Be direct. Cut anything that does not connect to my goals. I do not need volume. I need clarity.

WHAT TO UPLOAD FOR EACH EVENT: Photos of slides or whiteboards taken in the room Downloaded workbooks, PDFs, or session materials Notes typed or voice-to-text during sessions Business cards: photograph them or type the name, company, and context of where you met Any AI prompts, frameworks, or systems someone shared from the stage or in a breakout Tools, apps, or platforms referenced that you want to research Quotes worth adding to your content library

SECTION 08: THE 9 OUTPUT BUCKETS
BUCKET 1 - 90-DAY ACCELERATORS Moves a current goal faster. Act on these first. Examples: a system that eliminates a bottleneck you already have this quarter, a script that replaces something your team is struggling with right now, an automation that saves time on a task in your current 90-day run.

BUCKET 2 - NEXT 90-DAY CANDIDATES Not urgent now. Add to your next planning session. Examples: a lead pillar you want to test but do not have bandwidth for yet, a system worth building once your current quarter closes.

BUCKET 3 - 1-YEAR GOAL ADDITIONS Aligned with your annual plan. Needs more runway. Examples: a partnership that requires relationship-building before it produces results, a program or certification that takes months to complete.

BUCKET 4 - LONG RUNWAY (3 or 10 Year) Big vision items. Label the horizon. Examples: a new business model or revenue stream not right for this season, a speaking or media goal that requires more platform first.

BUCKET 5 - PARKING LOT Too good to delete. No current home. Review at next 90-day reset. Examples: an idea that resonated but does not connect to any active goal, a framework to revisit in a different season.

BUCKET 6 - EA / VA READY Delegate immediately. Zero follow-up questions needed. Examples: research a tool mentioned and deliver a one-page summary, draft a follow-up email to a contact using context from the event, pull contact information for speakers or presenters.

BUCKET 7 - TEAM SHARE Worth bringing back to your agents or staff. Examples: a mindset shift or framework the whole team needs to hear, a script or system worth adding to new agent training.

BUCKET 8 - FOLLOW-UP CONTACTS Every business card. Every connection. CRM action included. Format for each: Name, Company/Role, Why They Matter, CRM Action, Deadline. Examples: speaker whose framework aligns with your vendor program strategy, potential strategic partner worth a discovery call.

BUCKET 9 - RESOURCES TO RESEARCH Books, tools, platforms mentioned. Goal-aligned items flagged. Examples: tool mentioned in a breakout that could automate something you do manually, book recommended from stage you want before your next 90-day pla

THE PROFITABLE CLIENT EVENT FRAMEWORK

SERVE. SERVE. SERVE. SELL.

6 ANNUAL EVENTS: WHO YOU INVITE CHANGES EVERYTHING

MARCH
Ice Skating
Forever clients, vendors + their employees

APRIL
Dumpster Days
Forever clients, vendors + their employees

SEPTEMBER
Date Night
Forever clients only. Adults only. Raffle. Auction. Connection.

OCTOBER
Trunk or Treat
Forever clients + the entire community. Thousands attend.

NOVEMBER
Turkey Giveaway + Santa Photos
Forever clients + families. Our signature annual tradition.

FEBRUARY
Home + Lifestyle Expo
Forever clients + community. Vendor funnel. Public facing.

SPONSORSHIP TIERS: HOW EVERY EVENT PAYS FOR ITSELF

GOLD SPONSOR
$1,500
- Postcard advertisement
- Pre-event and evergreen video
- Social media campaign
- Booth + LED truck ad
- Shoutout at event
- Swag to hand out
- Post-event recaps (12 months)

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

THE CASH FLOW RULE
Set your budget first. Sell sponsorships to cover it. Every event must be cash flow positive. Build the checklist with the event date and every trigger auto-populates. Mailings, RSVPs, marketing timelines, sponsorship deadlines. The system runs it. You show up and serve.

$2,000+
min per event

POST-EVENT DEBRIEF: MANDATORY WITHIN 7 DAYS

01 Analyze survey results

02 What went well?

03 What can we do better?

04 Where can we add more value for clients + sponsors?

99x
A forever client gets touched 99 times a year.
Every touchpoint is service-centric. Zero commission breath. Serve, serve, serve, sell. Six events a year is six more reasons for your forever clients to say your name to someone who needs you.

GET THE FULL SYSTEM, CHECKLIST + COMPLETE COURSE Click Here

Want to see the full version before you build your own? DM "KIDTESTED" to @amystockberger on Instagram and I will send you a view-only copy of the Home Sweet Fun Activity Book.

WHAT THIS ACTUALLY IS
Most agents hand out pens and notepads. This is not that.

This is a branded lead generation asset that lives in your vendor partners' lobbies. Dentist offices. HVAC waiting rooms. Insurance agencies. Anywhere families sit and wait.

Kids pick it up. They color your logo. They solve puzzles using your program names. They hunt for your vendor partner logos hidden in a cityscape. Parents scan QR codes that link to your listings, your VIP Club, and your vendor network. Your brand is doing all of that without you in the room.

And it does not get thrown away. It sits in that lobby until the next family picks it up. Then the next. A well-made activity book has an indefinite shelf life in a waiting room. This is not a two-week touchpoint. This is a permanent fixture in every business that is part of your vendor program.

That is not a giveaway. That is a distribution network.

BEFORE YOU START

Pull up your actual programs and write them down. Your moving truck. Your VIP Club perks. Your annual events. Your vendor partner list. Your office details. Your team. Your office dogs if you have them.
Every page of this book should reference something real about your business. Generic activity books get ignored. Specific branded ones get kept.

STEP 1: OPEN YOUR CANVA DOC
Set your document to 8.5 by 11 inches. Build each page as its own slide. You will export the finished book as a PDF print file.
Use your brand colors throughout. Every page should feel like it belongs to the same family.

STEP 2: GENERATE YOUR STORY WITH AI
Tool: Claude

The story is the heart of the book. It introduces your brand to kids through a family just like theirs. Every program you offer gets woven into the plot naturally so parents absorb your value proposition while their kid is entertained.

Open Claude and paste this prompt:

"Write a short kids story for ages 5 to 10 about a family moving to a new home with help from [AGENT NAME] at [BRAND NAME]. Weave in these real program moments naturally: [list your actual programs here, for example: free moving truck, VIP Club perks including bounce house and cotton candy machine, annual events like Trunk or Treat and Santa photos, Home Support Team partners who help during the move]. Give the kids a specific mission during the listing process that makes them feel like heroes. End with the family excited and completely at home. Keep the tone warm, fun, and reassuring. Write each scene so it can be paired with an illustration on its own page."

Once you have your story, paste it back into Claude and use this follow up prompt:

"Write one detailed illustration description for each scene in this story. Each description should be specific enough for an AI image generator to create a warm, colorful, children's book style illustration. Include details about characters, setting, mood, and any branded elements like a moving truck or bounce house."

Take those illustration descriptions into Canva AI one at a time to generate your visuals directly inside your design.

STEP 3: BUILD YOUR ACTIVITY PAGES
Each activity page is a brand touchpoint. Kids return to these pages over and over. Every time they do they spend more time with your brand.
MAZE Tool: Claude

Prompt: "Write the text and layout instructions for a kids maze activity page for ages 5 to 10. The start image is a real estate office and the finish image is a new home. Include this prompt text on the page: Can you help [AGENT NAME] get the family to their new home? Describe the maze complexity appropriate for the age range."

Take the instructions into Canva and use a maze generator element or build it manually using Canva shapes.

COLOR BY NUMBER Tool: Claude then Canva
Prompt: "Design a color by number activity using [BRAND NAME] logo elements. Use 3 colors only: [your exact brand colors with hex codes]. Include the main logo shape, your tagline, and any program badge you use such as a VIP Club seal. Describe each numbered section clearly so I can recreate it in Canva."

BUILD IN CANVA: Recreate the outlined logo shapes, number each section, and add the color key at the top.

FIND THE DIFFERENCES Tool: ChatGPT for photo to line art conversion, then Canva for assembly

This is the one page that must use your real office photos. It is also one of the most powerful pages because kids spend minutes studying your actual space.

Take a real photo of your office. Open ChatGPT and use this prompt: "Convert this photo into a clean black and white coloring page outline. Keep all major details visible. Remove background clutter. Make lines bold and clear enough for a child to color."

Upload your office photo with the prompt. Download the result. Import both the original photo and the line art version into Canva. Place them side by side. Manually mark 5 differences on the original photo using Canva circle shapes in a bright color.

FIND THE LOGOS Tool: Canva AI for the cityscape, then manual logo placement in Canva

Inside Canva AI use this image prompt:

"A detailed illustrated cityscape with colorful buildings, storefronts, streets, and lots of visual detail in a Where's Waldo style. Bright colors, fun and playful illustration style, lots of hiding spots throughout the image."

Once generated, drop your actual vendor partner logos throughout the buildings manually in Canva. Resize them small enough that they require searching. This single page communicates your entire vendor network to every parent who looks at it without a single word of explanation.

DRAW YOUR DREAM ROOM AND DRAW YOUR DREAM HOUSE Tool: Claude

Two blank canvas pages with a large white box and drawing prompts along the bottom.

Prompt: "Write 8 fun and imaginative drawing prompts for kids ages 5 to 10 to use when drawing their dream bedroom. Make each prompt spark big creative thinking and feel exciting. Keep each prompt to one short sentence."

Repeat for the dream house page. Drop the prompts below a large blank rounded rectangle in Canva. Kids keep these pages forever.

RIDDLE ME THIS Tool: Claude
Prompt: "Write 4 home themed riddles for kids ages 5 to 10. Each answer should be a common object found inside a house. Keep the language fun and rhyming. Format the answers to be printed upside down at the bottom of the page."

REBUS PUZZLES Tool: Claude
Prompt: "Create 5 rebus puzzles for kids ages 6 to 10 using household words and moving related words. For each puzzle describe the images and any letter additions or subtractions needed to solve it. Include the answers printed upside down at the bottom. Make the words feel relevant to moving into a new home."

Take the puzzle descriptions into Canva. Use Canva's built in clipart and elements library to find matching images for each rebus. Arrange them with plus signs, minus signs, and equals signs between each element.

WORD SCRAMBLE Tool: Claude
Use your own program names as the scrambled words. This is non negotiable. Your program vocabulary becomes the content kids practice.

Prompt: "Scramble these words for a kids word scramble activity: [list your actual program names here, for example: VIP Club, moving truck, bounce house, new home, snow cone machine]. Format it as a numbered list with a blank answer line below each scrambled word. Include the answers printed upside down at the bottom."

MOVING DAY ADVENTURE CHECKLIST Tool: Claude
Prompt: "Write a kids moving day checklist with 3 sections: Before the Move, On Moving Day, and Arriving at New Home. Write each item as a fun mission with a bold title and a short playful one sentence instruction. Keep it appropriate for kids ages 5 to 10. Include 3 items per section."

STEP 4: ADD YOUR PERSONALITY PAGES
Tool: ChatGPT for photo conversions, Canva for design
These are the pages that make your book impossible to copy. No other agent has your office dogs. No other agent has your Kids Room. No other agent has your exact event photos.
For any coloring page created from a real photo open ChatGPT and use this prompt:

"Convert this photo into a clean black and white coloring page outline for kids. Keep all major details visible. Remove background clutter. Make the lines bold and clear enough for a child to color."

Upload the photo with the prompt. Download the result. Import into Canva. Pages to consider for this section: your office dogs by name, your office Kids Room if you have one, your branded moving truck, a photo from one of your annual events. Each one of these pages is something no other agent in your market can replicate.

STEP 5: BUILD YOUR BACK COVER AS A LEAD GENERATION PAGE
Tool: Claude then Canva

Your back cover is not a closing. It is an opening.

Prompt: "Write a warm and friendly back cover paragraph for a kids real estate activity book from [AGENT NAME] at [BRAND NAME]. Emphasize that buying or selling with us means the whole family is taken care of before, during, and forever after the move. Keep it short, genuine, and end with a simple call to action to reach out."

Include in Canva: your logo, the paragraph, and three QR codes linking to your current listings, your VIP Club perks page, and your Home Support Team partner directory.

Every parent who flips to the back cover in a waiting room has three reasons to scan and three ways to enter your world.

STEP 6: PRINT AND DISTRIBUTE
Export your finished Canva file as a PDF print file. Print locally.
Give copies to every client family with kids at first contact. Give a stack to every vendor partner in your program for their lobby. Restock them when you visit.
Your book is now in every waiting room in your vendor network. Every family that sits down in those lobbies is a potential client. They are reading your brand, learning your programs, and scanning your QR codes.
You are not in the room. Your book is doing the work for you.

One rule. Make every page earn its place. If a page does not teach kids your brand, show parents your programs, or give the family a reason to keep the book, cut it. Every page is a lead generation touchpoint. Treat it that way.

DM "KIDTESTED" to @amystockberger on Instagram to see the full Home Sweet Fun Activity Book before you build your own.

AMY STOCKBERGER
REAL ESTATE

Clean Kid's Club

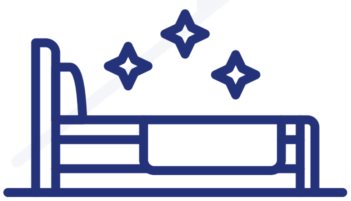
Listing Agreement

Parent(s)/Guardian(s)/Name: ______________________________

Child(ren)'s Name(s): ______________________________

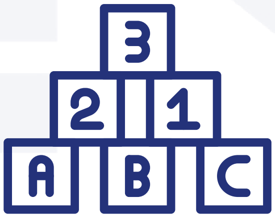
Property Address: ______________________________

Clean Kid's Club Responsibilities:



☐ Daily Room Tidying

The child(ren) will ensure their bedroom is picked up each day with toys, clothes, and personal items neatly stored away.



☐ Toy Clean-Up

The child(ren) will help put away all toys and belongings each evening, ensuring common areas remain tidy.

☐ General Tidiness

The child(ren) will assist their parents in maintaining the overall cleanliness of the home by helping with small tasks as needed.

Reward:

- ☐ $25 Target Gift Card
- ☐ $25 Juice Stop Gift Card
- ☐ $25 Barnes & Noble Gift Card
- ☐ 2 Free Passes to Escape 605
- ☐ 2 Free Passes to Rough Cut Social

Acknowledgement:

By signing this agreement, both the parents/guardians and child(ren) agree to participate in the Clean Kid's Club and fulfill the responsibilities outlined above.

Parent(s)/Guardian(s) Signature: ______________________ Date______________

Child(ren)'s Signature(s): ______________________ Date______________

Listing Agents Signature: ______________________ Date______________

AMY STOCKBERGER
REAL ESTATE

[CLICK HERE FOR A TEMPLATE LINK]

STOCKBERGER
L ESTATE

Clean Kid'S Club

LiSting AGreement

arent(s)/Guardian(s)/Name: ____

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nt(s)/Guardian(s) Signature: ______________________ Date______________

d(ren)'s Signature(s): ______________________ Date______________

ıg Agents Signature: ______________________ Date______________

CLEAN KID'S CLUB LISTING AGREEMENT

6. HAVE AN EXIT PLAN

A solid exit plan ensures your business remains valuable and sellable when the time comes to step away. Over 80% of small business owners don't have an exit strategy, leading to lost opportunities. By systematizing your business, focusing on repeat and referral clients, and diversifying profit centers, you build a business that can run without you and sell for more. Buyers aren't just purchasing a job—they're buying a well-oiled machine.

ACTION STEPS FOR YOU:

1. **Lay a Foundation of Serve, Serve, Serve, Sell** — Build a reputation based on service and value. Serve your clients first, and the sales will follow.
2. **Systematize Your Business** — Create systems for every aspect of your business, from lead generation to client nurturing. This adds predictability and value.
   Tool: Databank Developer
3. **Diversify Profit Centers** — Ensure your business has multiple streams of income beyond commission. This makes it more resilient and attractive to potential buyers.
4. **Focus on Repeat and Referral Business** — Build a structure where referrals and repeat clients make up a large portion of your revenue. This makes your business easier to sell.
   Tool: Source Code System
5. **Plan Your Exit NOW**— Even if you love your work, start preparing your exit strategy now. You'll be ready when the time comes.

LIFETIME HOME SUPPORT 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?

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 ____________________

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

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.

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

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

SOURCE CODES

100's - AS Team

101 – AS Team (Lead from Amy)
102 – AS Team (Lead from Adam)
103 – AS Team Website
104 – AS Team Realtor.com
105 – AS Team Trulia
106 – AS Team Zillow
107 – AS Walk-in
108 – AS Employee
109 – GSP Flip
110 – Non-Profit Organization
111 – AS Team kvCORE
112 – A&A Personal
113 – Hoffberger, LLC
114 – Stockberger Rentals
115 – Instant Offer
116 – PMT AST
117 - CORE15 Lead
118 - Curaytor
119 - Seller Seminar
120 - Buyer Seminar
121- Referral Agents
122- BHC-AST, LLC

200's - ISA

201 – ISA Real Geeks
202 – ISA Realtor.com
203 - ISA Sierra
204 – ISA Zillow
205 – ISA Call
207 - ISA Homelight Referral
208 – ISA Expired
209 – ISA FSBO
210 – Fast Expert Referral
211 – ISA Floor Time
212 – ISA Sign Call
213 – ISA AmyStockberger.com
215 – ISA Lender Referral
217 – ISA kvCORE
218 – ISA Broker to Broker Referral
219 - ISA LISF YouTube
220 - ISA Redfin
221 - ISA HST Employer
222- ISA Opcity Referral
223 - ISA Podium
224 - ISA Referred by ASRE Client
225 - ISA Google PPC kvCORE
226 - ISA Social Media
227 - ISA Local Best
228 - ISA General Marketing
229 - ISA Plane
230 - ISA LED Truck
231 - ISA Past Client
232 - ISA BGRS Referral
233 - ISA Chase Referral
234 - ISA Sold.com
235 - ISA Effective Agent Referral
236 - ISA MyAgentFinder Referral
237 - ISA Google Call-in
238 - ISA Google PPC Sierra
239 - ISA homes.com
240 - ISA Sierra Number Call In

300's - Marketing/Farming

301 – Billboard
302 – Local Best
303 – General Marketing
304 – Print Ad
305 – Radio
306 – General Social Media
307 – Bridal Show
308 – Buyer Seminar
309 – For Sale Sign
310 – Open House
311 – Floor Call
323 – Facebook
324 – Instagram
325 – YouTube
326 – HSSF
327 – LHS
328 – LISF
329 - SF.Business
330 - Newsletters
331 - LED Truck
332 - Agent Sierra Site
333 - List Giant List
334- Trade Up Program

400's - FSBO/Expired

401 – FSBO
402 – Expired

500's - Lenders/Builders/Corp/Sanford

501 – Lender
502 – Relocation Comp
503 – Sanford
504 – Builder
505 – Leads Group
506 – Wade Randall
507 – HST Partner Referral
508 – Corporate Partnership Referral
509 - HST Partner
510 - Corporate Partner

600's – Sphere of Influence/Past Clients

601 – Agent SOI
602 – Employee SOI/Referral
603 – Past Client
604 – A&A SOI Referral
605 – Past Client Referral
606 – Past Client ISA Lead
607 – Previous Opposite Client

700's - Referrals

701 – Affiliate Partner Referral
702 – Broker to Broker Referral Outgoing
703 – Broker to Broker Referral Incoming
704 – Real Property Management Referral
705 - One Roof Referral

Checkout all of our

LIFETIME HOME SUPPORT™ BENEFITS

LIFETIME HOME SUPPORT

Don't miss the opportunity to revolutionize your real estate business with our proven Lifetime Home Support™ solutions.

Explore our comprehensive offerings today to discover exclusive solutions, personalized coaching, and powerful tools designed to accelerate your growth and success. Become a Servepreneur now and start creating clients for life while maximizing your revenue and market share!

SCALE TODAY:

www.LifetimeHomeSupport.com

YOUR LIFETIME HOME SUPPORT™ STARTS HERE

SEE WHAT'S INCLUDED

CONNECT TODAY

CONNECT WITH AMY STOCKBERGER:

Click Here