



21 DAY FIX *22*

- CHANGE YOUR BUSINESS -
TAKE THE CHALLENGE

THE
SCOFIELD
GROUP



Moment of Meditation:

Why are you doing this program? What do you hope to get out of this?

Really think about it for a few minutes. What is holding you back from going for it...all the way?

When you know why you are doing something, you can push through the tough times.

Write your thoughts here...

Complete the Daily Charge Sheet on the next page.

DAILY CHARGE SHEET

"WHY SHOULD SOMEONE CHOOSE YOU?"

Today's Date: _____

START MY DAY:

1. Join Call with Tony - 8:50AM - 9:00AM YES / NO

DAILY NON NEGOTIABLES ("He or She with the Most Conversations WIN")

2. New Conversations 1 2 3 4 5 6 7 8 9 10

3. Follow Up Calls 1 2 3 4 5 6 7 8

4. Follow Up Text 1 2 3 4 5

5. VIDEOS to CLIENTS (Text, EMAIL or Bomb Bomb) 1 2 3 4 5

6. VIDEOS on SOCIAL MEDIA YES / NO

7. POST on SOCIAL MEDIA YES / NO

8. Grow your SOCIAL AUDIENCE by 20 PEOPLE YES / NO

9. Review NEW LISTINGS on MY SEARCH YES / NO

10. Ask for Review & Referral 1 2 3 4 5

11. 1 hour of personal care YES / NO

12. Farming/Door Knocking/Circle Prospecting/Open House/Marketing Events YES / NO

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How Can I handle the Objections and Prepare Better for Next time?

Appointments SET: Listing/Seller 1 2 3 4 5 Buyer 1 2 3 4 5

HANDWRITTEN NOTES + DIGITAL FOLLOWUP

Today's challenge Every relationship in your business begins with a conversation — and conversations begin with connection. Handwritten notes are proof that you care enough to slow down. Pairing them with a friendly digital nudge keeps you memorable and gets replies flowing.

Why It Matters:

1. Stands out in a digital world, handwritten = emotional impact
2. Referrals come from relationships: thoughtful follow-up sparks conversation
3. Sets immediate momentum, you start Day 1 with outreach + wins
4. People remember how you make them feel and they tell others

How to Execute:

- Choose 5 people from your database (VIPs, recent clients, warm SOI, etc.)
- Write a note referencing something personal
- Use quality stationery (brand-aligned or simple + clean)
- Drop in mailbox today
- Message them a follow-up
- Track responses in your CRM

Handwritten Note Prompts (Pick 1)

You may write something like:

- “Thinking about your home and hoping it continues to bring you joy this year.”
- “Grateful for people like you, wishing you more good days than you can count.”
- “Loved working with you last year, how are you enjoying the new kitchen?”
- “Hope 2025 brings great memories in your home, you deserve it!”

Follow-Up Text Scripts

Send right after writing the note:

“Hey! I just mailed a little note your way 📬 Hope it brings a smile! 😊”

“Quick heads up! Something handwritten is on its way to you 📬🌟”

“It’s not junk mail 😊 keep an eye out for a little surprise from me!”

Need Help? Use this exact ChatGPT prompt:

“Write 5 short handwritten notes for past real estate clients including a personal check-in, gratitude, and positive encouragement. Keep them under 30 words and warm.”

Sample AI-Generated Notes:

- “Hi Sarah — thinking about you and your beautiful backyard. Hope this season brings lots of great memories out there!”
- “Just stopping to say I appreciate you. Here’s to another amazing year in your home!”

Copy → personalize → handwrite.

Moment of Meditation:

They say comparison is the thief of joy. Reflect for a moment on what makes you unique.

How can you bring that into your business?

Call a colleague and role-play your unique value proposition.

Write your thoughts here...

Why Me? Why The Scofield Group? ... Here's a starter:

You're going to love working with me because...

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Moment of Meditation:

What would you do if you KNEW you could not fail?

How big are you REALLY dreaming? Finish this thought: It would be crazy awesome if _____ happened by this time next year.

Write your thoughts here...

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HIGHLIGHT A LOCAL BUSINESS

Today's challenge Create and post one Local Business Spotlight using either:

- A Reel (recommended) or
- Carousel Post

- Tag the business (Just One)
- Invite them to Collaborate
- Use geo-specific location(check-in, tag location on post)

Why It Matters

1. You position yourself as a local connector and resource
2. Your content gets shared by the business = new eyeballs
3. It sparks new referral partnerships
4. The algorithm boosts collaborative content

One great spotlight can lead to:

- A repost to hundreds/thousands locally
- Conversations
- A long-term referral relationship

How to Execute:

1. Choose a business you genuinely love
2. (coffee shop, bakery, gym, boutique)
3. Ask if you can do a quick video
 - Most will say YES (it's free exposure)
 - Film b-roll (no fancy recording needed)
 - Exterior sign
 - Favorite menu item/product
 - Owner smiling/waving
4. Record 5–10 seconds of YOU talking
5. Add captions + tag business + post

Note: Make sure to keep it under 30 seconds & Mention what makes them special.

Collaboration Script (DM to Business Owner)

“Hey ___! I'm a local REALTOR® spotlighting awesome local businesses this month. I'd love to feature you – no strings attached!

Are you open to a quick 20–30 second video shoutout or photos next time I'm in?”

- Easy yes
- Free promotion
- Future referrals

Use AI for caption + talking point generation. Paste this into ChatGPT:

“Create a fun Reel caption highlighting [Business Name] in [City]. Add anything that will help me rank for local search and real estate visibility using [Add Social Platforms].”

Moment of Meditation:

Why is reaching out and contacting people so hard? What is it you are so afraid of?

What is the worst thing that could happen?

Write it here: _____ If that happened....is it really so bad?

How can you challenge yourself to work on this?

Write your thoughts here...

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Moment of Meditation:

All top producers follow a process from A-Z. They do not allow any prospect to get them off track. This Buyer Process from A-Z is designed to help you replicate and duplicate sales at will. Memorize this and watch your sales 🚀

Scan QR Code to access A-Z Process



Identify and Name it here. _____

List 3 ways you plan to attack this skill building opportunity:

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Moment of Meditation:

Think like a MARKETER!

Think about the image you want to convey about your business. Does your marketing reflect that? Will your friends really know what you do?

How are you letting the The Scofield Group brand give you instant credibility?

The power of The Scofield Group and Your personal brand combined = Credibility to your personal brand and puts you as the authority; making you a trusted source.

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FARMING LAUNCH DAY

Today's challenge: Deliver 100 farm flyers, Post one Reel from the neighborhood. Choose one farm neighborhood and OWN IT.

This initiative will not only increase your visibility but also establish you as the go-to real estate advisor in the neighborhood.

Why It Matters

1. Homeowners want an expert for their neighborhood
2. Farming delivers predictable listing inventory
3. Being seen repeatedly increases trust + recall
4. This is the foundation of a scalable listing business.

Maximize Your Impact with Social Media

1. Choose the neighborhood
 - Ideal farm:
 - 300–500 rooftops
 - Turnover rate 6%+
2. Print flyers (simple + clear message)
 - Equity / buyer need messaging
 - QR code = your lead form or website CTA
3. Walk the community
 - Use eye-level placements at Door or News Paper Tubes (never inside mailboxes)
4. Capture quick footage for your Reel
 - You holding flyers
 - Neighborhood entrance sign
 - A quick chat-style clip

If you don't have a ready to go campaign Use ANY OF OUR PREMADE "Paint The Town Green" Templates (5 Versions and Growing) Use this Plug & Play Formula:

8 Buyers Want a Home in [Neighborhood]
Thinking about selling?

Your timing has never looked smarter.
Scan for your instant home value + real-time buyer demand.

Make it fast and easy, No one wants to fill out 20 fields .

Pro Tip: We have a collection of Jared James Farming Letters > Access in SKOOL. We also have 5 customizable 8-week farming campaigns ready for you to begin deploying that are accessible via Canva. (Contact SSS for more details)

Moment of Meditation:

Who do you know that needs to hear from you today? Who needs your advice?

How can you offer what you know in an effective way to help someone? What information do you need to share with the world?

Idea starters:

Lending - Downpayment Assistance, 100% financing, jumbo loans, DSCR Loans (Debit Service Coverage Ratio) for investors.

Lead Magnets - “5 Things Sellers Need to Know Now to Maximize their Homes Value”, “Why Rent When You Can Own”, ETC.

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DO VIDEO IN FRONT OF A LISTING

Today's challenge: Film & post one 30–60 second vertical video. A compelling video in front of one of your active listings, builder model home, community or A Deal of the Week. (Our Listings or Another Firm's Listing. This video should highlight the property's key features while keeping it engaging and informative. (Get necessary approvals to market the home if not yours.)

Goal:

Prove you are active
Show knowledge of inventory
Demonstrate confidence + energy

Post to your Platforms:
Instagram (post + story)
Facebook

Option: TikTok + YouTube Shorts

Why It Matters:

- 82% of sellers choose the agent they see the most
- Video creates instant trust
- Content filmed near listings = authority signal
- Algorithms reward local real estate visuals

You're showing that you are on the field, not watching from the bench.

How to Execute:

Set Location Options:

- In front of active listing
- At a new construction site
- At a neighborhood entrance
- In front of a "SOLD" sign
- At a Coming Soon home
- Deal of the Week

Essential Shots:

- You talking > close, mid-frame
- House or community sign for context
- A feature highlight (porch, curb appeal, new roof, schools nearby)

- BONUS: Add captions + trending audio using CapCut

Use this Prompt in ChatGPT:

"Write a 45-second real estate reel script for a listing in [City] focusing on curb appeal, backyard entertaining, and proximity to top schools. Tone: enthusiastic, confident."

Hook Ideas

"Stop scrolling; this kitchen is going to ruin every other kitchen for you 🥰"
"You're about to fall in love, don't say I didn't warn you 🥰"

Moment of Meditation:

What if you fail?

Not every idea works. Embrace the fact that not everything works, and that is OK! Failure is simply learning one way not to do something.

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ASK FOR REFERRALS– VIDEO, EMAILS. GOAL IS 3

Today's challenge: Send 3 personalized VIDEO messages to past clients or SOI

Thank them for their support
Tell them you have capacity for referrals
Keep it human + warm
NO desperate energy

Delivery channels:

- BombBomb
- Text video
- Messenger video
- Instagram DM video

Pick people who:

- Have already referred someone
- Rave about you
- Could be a referral champion

Why It Matters:

1. People refer when the timing aligns
2. A video message hits emotionally
3. Each ask becomes a conversation starter
4. Referrals are the fastest, easiest, highest-trust closings

🔥 **Warm relationships = warm leads**

🔥 **Warm leads = fast closings**

How to Execute:

Your 15–30 second Video Script

“Hey [Name]! I was just thinking about how grateful I am that you trusted me with your home. And I have space to help 2 new clients this month. So, if anyone in your world is considering a move this year, I'd love the chance to help them the way I helped you. Hope you're doing amazing; talk soon!”

Make sure to have: Eye Contact, Smile, Authentic tone, Short + Confident

Follow-Up Text Options

If they respond:

“You're the best, appreciate you! Let me know how I can help your people 🙌”

If they don't respond:

“Hey, no worries at all! Grateful for you either way 😊”

- **Have gratitude regardless of outcome.**

Paste into ChatGPT:

“Write 5 different 20-second referral request video scripts for a real estate agent that sound warm, grateful, and confident, zero sales pressure.”

Moment of Meditation:

Make Me Feel Important (MMFI:) *Mary Kay Says “ Every customer has an invisible chain around their neck that says ,Make Me Feel Important” - Mary Kay”*

How do you make people feel?

How do you WANT to make people feel?

How are you making a conscious effort in your everyday work to convey this?

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CRM MANAGEMENT AND COMMITMENT

Today's challenge is all about getting your Customer Relationship Management (CRM) system organized and committing to using it consistently moving forward. Time Required: 45–60 minutes

Pro Tip: Look 12 – 18 months back, This is the normal cycle of when some people may come forward.

1. Clean up 25 contacts in your CRM (Moxi or FUB)
2. Update lead stage + tags + contact info
3. Add one automated follow-up workflow
4. Log 5 touch points to revive older leads

Impact: Future closings + fewer missed opportunities

Why It Matters

1. A clean CRM reveals real opportunities
2. 50–60% of “dead leads” actually convert within 6–12 months

Agents lose business not because of lack of leads...
... but because of lack of consistent follow-up

🔥 You are reclaiming deals that are already yours.

How to Execute:

Step 1: Identify 3 Groups, Update contacts tagged as:

Hot Now (active search / prep → appts within 30 days)
Warm 90 Days
SOI = Nurture

Add property preferences + next step dates.

Step 2: Create One Automation Options based on your CRM:

- New leads → automatic welcome text + bio message
- Long-term nurture → 30/60/90 day value email sequence
- “We haven’t talked in a while” revive campaign

Goal: Remove manual follow-up bottlenecks

Step 3: Execute 5 outreach messages

Pick failed conversations, cold leads, or stalled buyers

Paste this into ChatGPT:

“Create a 3-touch follow-up sequence for a warm real estate lead that didn’t respond last time. Include friendly check-ins and a soft CTA tied to motivation.”

Expected output:

- 3 messages
- Spaced over 10–14 days
- Movement toward conversation

Moment of Meditation:

You are approaching the end of week 2. What activities have been the hardest for you to accomplish so far?

Why are these things tough for you? How can next week be different?

The last week of the program is where you leave it all on the table!

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CREATE A VIRTUAL BUSINESS CARD

Today's challenge Set up + launch your Smart Digital Business Card and send it to 10 high-value contacts.

Apps you can use: Go to **App Store**, **Android Marketplace** or **Google Play Store** to Download

- Linq
- HiHello
- Blink
- Dot Card
- Mobilo

Required Fields:

- Mobile number click-to-call
- Email tap-to-send
- Website or Linktree
- Calendar Link (15-minute intro call)
- Instagram + Facebook
- Google Business Profile

* Everything in one tap = more appointments

Why It Matters

- **People refer in the moment**
- **Fast contact = fast conversion**
- **A sleek digital card signals professional credibility**
- **If you make it easy → people take action**

Shareability = referrals multiplied

How to Execute:

- 5-Step Setup
 1. Pick your platform (Linq recommended)
 2. Upload clean profile photo
 3. Add brand colors + logo
 4. Add a scheduling CTA: "Book a quick Q&A call with me"
 5. Test card with a friend > Confirm links work

Save card to phone homescreen

Assign NFC tap-card if available

Moment of Meditation:

What are you most grateful for?

Take a few minutes to make a list of the things that you are grateful for? (Don't stop until you get 10.)

Go on Social Media and Post 2 things that you're thankful for.

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CREATE YOUR SIGNATURE LISTING MARKETING PLAN

IF YOU DON'T KNOW, THEY DON'T KNOW

Today's challenge Build a 1-page listing marketing plan you can:

- Present in listing appointments
- Email to new seller leads
- Post on website + social
- Print for open houses
- Use as lead generation

Design is clean, modern, confident and At minimum list 10–15 actions you perform

Why It Matters:

- **Sellers interview agents for marketing expertise**
- **A plan shows you provide value on purpose**
- **Confidence in your plan = confidence in YOU**
- **Real estate becomes a professional service, not a commodity**

This positions you as the premium choice.

How to Execute:

Break your plan into 5 strategic phases:

Recommended Structure:

- Pre-Market Positioning
- Pricing strategy + local comp data
- Pre-list home recommendations
- Vendor network coordination
- Pre-launch marketing materials

- Listing Day Launch
- Professional photography
- Pro-level copywriting
- Measurement-accurate floorplans
- Mobile-first listing marketing
- Instagram + Facebook activation

Targeted Buyer Reach

- Portal optimization (Zillow/Realtor.com)
- Coming Soon strategy (if applicable)
- Neighborhood farming announcement
- Buyer agent network promotion

Traffic Generation

- Paid social boosting
- Email campaign to buyers & SOI
- Open house strategy
- Daily showing feedback reports

Offer Maximization

- Negotiation strategy
- Appraisal support
- Weekly progress calls
- Closing coordination

Use ChatGPT to make your plan seller-friendly:

Prompt:

“Rewrite my listing marketing plan to be seller-oriented, persuasive, and focused on maximizing equity. Keep bullets short and powerful.”

Moment of Meditation:

Distractions are everywhere....it only takes a second to get off track and sucked into an hour on Facebook. But distractions can come in so many shapes and sizes.

What is keeping you from showing up the way you want to? What is in your way?

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DAILY NON NEGOTIABLES ("He or She with the Most Conversations WIN")

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3. Follow Up Calls 1 2 3 4 5 6 7 8

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5. VIDEOS to CLIENTS (Text, EMAIL or Bomb Bomb) 1 2 3 4 5

6. VIDEOS on SOCIAL MEDIA YES / NO

7. POST on SOCIAL MEDIA YES / NO

8. Grow your SOCIAL AUDIENCE by 20 PEOPLE YES / NO

9. Review NEW LISTINGS on MY SEARCH YES / NO

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11. 1 hour of personal care YES / NO

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How Can I handle the Objections and Prepare Better for Next time?

Appointments SET: Listing/Seller 1 2 3 4 5 Buyer 1 2 3 4 5

ONLINE REVIEW & REPUTATION UPGRADE

Today's challenge: Complete 5 review credibility upgrades

1. Update Google Business Profile
2. Optimize LinkedIn, Social, Zillow + Realtor.com profiles
3. Request 3 new reviews
4. Add client testimonials to website / digital card
5. Share 1 testimonial to social as brand-proof content

Time required: 45–60 mins

ROI: Multi-year conversion power

Why It Matters

- 94% of sellers look at online reviews before choosing an agent
- Google rewards businesses with more review activity
- Reviews outperform ads in trust building
- Testimonials reduce decision friction
- Your future sellers are already Googling you
- Today ensures they like what they find

How to Execute:

Step 1: Profile Audit & Refresh

- Google Business Profile
- Zillow
- Realtor.com
- Facebook Business Page
- LinkedIn (optional)

Upload:

- New headshot
- New bio
- Recent listing photos
- Awards or production highlights
- Brokerage affiliation
- Service areas (SEO!)

Step 2: Review Ask Campaign (3 requests)

Pick:

- Most grateful clients
- Raving fans
- Your subscription recipients
- Long-term supporters

Step 3: Create 1 Social Proof Post

- Turn a review into a graphic + short caption
- Share to IG, FB, and Stories

Review Request Scripts

Text Script:

"Hey! Quick favor: Would you mind leaving a short review about your experience working with me? It really helps homeowners feel confident choosing the right agent. Here's the link: [Insert link] Thank you so much!"

QR-Friendly Message: Use Generator in Canva Element Selection "QR Generator"

"If it's easier, here's a QR code: A scan + 30 seconds is all it takes!"

Email Script:

Subject: A Small Favor ❤️

It would mean the world if you'd share a quick review of working with me. Even 2–3 sentences helps other homeowners feel confident choosing the right agent!

Here's the link: [Insert link]

Thank you again — truly grateful for you!

Prompt to paste into ChatGPT:

"Turn this testimonial into 3 social media captions with confident tone, authority positioning, and a strong CTA. Include 5 real estate hashtags per caption."

OR

"Summarize this long review into a short, powerful quote that highlights trust and results."

Moment of Meditation:

What does success look like to you? What do you want to accomplish by the end of the year?

Think about the personal goals that fuel you.

What do you want to do/have by this time next year?

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MARKET UPDATE CONTENT THAT BUILDS AUTHORITY

Today's challenge: Create a 3-format Market Update Content Pack

- 45–60 sec Video for Instagram + Facebook
- 1 Graphic/Carousel for feed + stories
- 1 Short Post/Caption for engagement

Note: Localized to your specific market (“Las Vegas real estate” is better than, “general US housing news”)

Why It Matters

1. Sellers want agents who understand market timing
2. Buyers want to know when to move
3. People will NOT trust someone silent on the market

When you speak confidently > people follow

When headlines scare them > they call YOU for guidance

How to Execute:

Step 1: Pull 3 Data Points (Choose any three):

- Median list price change
- Days on market
- New listings vs sold
- Interest rate trend
- Buyer demand indicator
- Neighborhood sales activity
- Fast Stats

Pro Tip: Short + simple + specific wins.

Step 2: Pick a Narrative Style

Option A → “The Market Is Moving”

- Focus on buyer activity + urgency

Option B → “Equity Opportunity”

- Highlight rising values

Option C → “Timing Matters”

- Strategic messaging for sellers
- You are controlling the narrative

Step 3: Create Your Content Pack

Want AI Help? Paste into ChatGPT:

“Write a 45-second market update script for [City] with 3 confidence-boosting takeaways for homeowners.

Tone: bold, informative, and optimistic.”

And: “Create a carousel outline for a real estate market update that encourages homeowners to check their equity.”

AI = faster production + more consistency

Moment of Meditation:

How do you want your day to feel?

What do you have control over in your day that influences the feel of your day?

How are you leveraging systems to help you be more efficient?

What do you need to learn about/start using??

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AI EFFICIENCY UPGRADE: AUTOMATE 3 TASKS TODAY

Today's challenge: Automate 3 recurring tasks using AI or your CRM:

Choose 3:

- New Lead Welcome Text/Email
- Weekly Social Captions
- Home Anniversary Messages
- Quarterly SOI Reach-Out
- Buyer Search Alerts
- Monthly Newsletter Send
- Open House Follow-Up

Time Required: 30–45 mins

Time Saved Monthly: 3–10 hours

Why It Matters

- The market rewards speed + consistency
- Automations ensure no lead slips through cracks
- You stay visible without effort
- More conversations happen without prompting
- You build a dependable business engine

How to Execute:

Speak it directly into ChatGPT, Grok or any other AI Chat tool.

Ask it to make you _____ for Social Media.

Email Newsletter for Lead Generation to wake up your database via Gemini, ChatGPT, Grok, etc.

Writing scripts for Video Text or Scroll Stopping Hooks for Social Reels

Prompt:

I'm a real estate agent looking to create [choose one: a social media post / an email newsletter / a short video or Reel script / text message campaign] to generate leads.

Here's what you need to know about me and my goal:

- My market: [city or area]
- My audience: [buyers, sellers, investors, renters, or agents]
- My current focus or offer _____.
- My tone or style: [professional, bold, funny, luxury, educational, community-based, etc.]
- My call to action: [example: "Schedule a call," "Get your free home valuation," "See available homes," etc.]

PEOPLE THINK TOP PRODUCERS WORK HARDER, BUT THEY JUST
WORK SMARTER AND MORE AUTOMATED.

Moment of Meditation:

How confident are you on your market knowledge?

What areas do you want to become more expert in? Basic mortgage? New construction? Area and Amenities?

How can you create a plan to gain what you need from the resources we provide?

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EMAIL NURTURE MAGIC: BUILD RELATIONSHIPS ON AUTOPILOT

Today's challenge: Build and deploy 1 automated 4-week nurture email series for either buyers, sellers, or sphere of influence.

Choose one:

- Buyer Journey Series: Education-based trust builder
- Seller Readiness Series: Value & equity storytelling
- SOI Connection Series: Light touch relationship emails
-

Goal: 1 email per week > consistent connection > compounding trust.

Why It Matters

- 1.73% of people work with the first agent who stays top of mind
2. Email = lowest cost, highest ROI channel
3. Nurture builds trust quietly but powerfully
4. Clients often decide subconsciously based on familiarity

Conversations don't die, they just go cold. Email heat them back up.

How to Execute:

Step 1: Choose Your Series Theme

Audience	Focus	Goal
Buyer	Clarity + confidence	Schedule showing
Seller	Market insight + equity	Book consultation
SOI	Relationship + relevance	Stay top-of-mind

Step 2: Build the 4-Email Sequence

Email #1 – The “Value Drop”

Subject: Thinking about your next move?

Brief update + value share (“3 things to know about this market”)

CTA: “Want to see what that means for your home?”

Email #3 – The “Guide or Resource”

Subject: Free guide: [insert title]

Offer lead magnet, checklist, or home-prep tips

CTA: “Grab it here – no strings attached.”

Email #2 – The “Proof & Story”

Subject: Real results from real clients

Short client story + visual of success

CTA: “If you're thinking about your own move, let's talk strategy.”

Email #4 – The “Reconnection Ask”

Subject: Still on your radar?

Check-in, invite response, or soft schedule CTA

CTA: “What's the next step for you this year?”

Step 3: Load Into Your CRM or Email Tool

- Follow Up Boss, MOXI, Mailchimp, etc.
- Schedule 1 email per week for 4 weeks
- Segment list by Buyer, Seller, or SOI
- Add merge tags for name personalization
- Add branded signature + scheduling link

Paste into ChatGPT:

“Write a 4-part real estate email nurture series for homeowners thinking about selling in [City]. Include subject lines, body copy, and CTAs. Tone: friendly, confident, professional.”

Moment of Meditation:

Know that what you do is meaningful. You are moving through the world every day affecting people, how can you make someones day today?

It doesn't have to be about spending a dime. Share a smile, give a compliment, hold a door.

#SpreadJoy

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PAST CLIENT LOVE: RETENTION, REFERRALS & RECONNECTION

Today's challenge: Reconnect with 5 past clients today; personally and intentionally.

Choose 3 of these touchpoints:

- Send a personal video message
- Drop off a small appreciation gift (Starbucks card, note, home item)
- Send an equity update with a personal note
- Text them about something specific (birthday, anniversary, milestone)
- Invite them to a Client Appreciation Event or VIP List
- Refinancing their loan
- Offering Vendors (Painter, Lawn Care, HVAC)

Why It Matters

- It costs 5–7x more to get a new client than to retain one
- Past clients are 2x more likely to refer if they hear from you quarterly
- 60% of homeowners don't remember their agent's name after 12 months

Visibility = Value

Consistency = Connection

Connection = Contracts

When you show up with care, you're not asking for business, you're earning it all over again.

How to Execute:

Step 1: Build Your "Past Client Hit List"

- Filter CRM for:
- Closed in last 12–24 months
- "Happy" notes or 5-star review clients
- Easy rapport (you'd grab coffee with them)
- Add to tag: "Past Clients – Touchpoint Q1"

Step 2: Choose Your Touchpoint Mix

- Option 1: Video Message (Text or Email)

"Hey [Name]! Just checking in – I was driving through your neighborhood and thought of you guys. Hope you're loving the home! The market's been moving a bit – want me to send a quick update on your home's value?"

- Option 2: Handwritten Card

"Hope you're doing great and still loving your space! Just a little note to say I'm thinking of you – and always here if you or someone you know needs help navigating the market."

- Option 3: Gift Drop-Off (Pair with your branded note)

"Because good clients become great friends. Thank you for trusting me with your home journey!"

Step 3: Document + Follow Up In CRM:

- Add note: "Touched base via [method]"
- Tag: Past Client – Active Touchpoint
- Set next follow-up for 60 days
- Trigger "Equity Update" email in 30 days

You're creating an always-on system of care.

Paste into ChatGPT:

"Write 3 personalized messages I can send to past real estate clients to check in, celebrate their home, and naturally invite future referrals. Tone: warm, authentic, not salesy."

Moment of Meditation:

Financial planning and goals. Are you paying attention to what you need to so you can stay on track? How do you track mileage? How about other expenses?

What about your income? Can you think of a way to put this on the priority list so you can be better armed for success?

This is YOUR business!

Complete the Daily Charge Sheet on the next page.

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COMMUNITY PRESENCE & LOCAL PARTNERSHIP POWER

Today's challenge Engage with your community in-person and online through 3 strategic actions today:

1. Partner with one local business for mutual promotion
2. Feature a local spot or event on social media
3. Engage with 10 local profiles or pages (comment, share, tag)

Why It Matters

- People buy from people they see, like, and trust
- Your reputation should extend beyond listings
- Partnerships compound: 1 collaboration → 1000 new eyes
- Community = credibility, and credibility = closings
- Every post, visit, and handshake creates micro trust and micro trust turns into macro opportunity.

How to Execute:

Step 1: Identify Local Collaborations

- Pick a business that aligns with your market and your brand.
- Examples: Coffee shop, Gym, Garden center, Contractor or Stager
- Goal: Mutual exposure: They share your post, you share theirs.

Tip: Start with people you already know. Warm intros build faster.

Step 2: Film or Capture Community Content

“Hey Charlotte! I'm here at [Business Name] – one of my favorite local spots in [Area].

If you haven't checked them out yet, you're missing out.

I love partnering with local businesses because supporting each other is what community's all about.

Big thanks to [Owner's Name] for having me – I'll tag them below so you can follow!”

- Keep it under 30 seconds
- Tag location + owner

Step 3: Build Community Interaction Momentum

Comment on: Local builders, Restaurants, Schools, City/County updates, Charities or Local Businesses

- Leave genuine comments & not sales pitches.

Step 4: Post Your Community Highlight

Caption Template:

Supporting the places that make our community great 🙌

One thing I love about living in [City] is that there's always something happening and someone worth celebrating.

If you're new to the area – come see why people love calling [Neighborhood] home.

CTA: “Want my full list of local favorites? DM me ‘LOCAL.’”

Use as a lead magnet and build your email list.

Moment of Meditation:

Who are your biggest fans, the people who cheer for you relentlessly?

Is there anyone in your life that you should take some time to thank for their support or encouragement?

Give them a call, write them a note, shout it out on Facebook. Let them know that you appreciate them!

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VIDEO FOLLOW-UP: TURNING CONVERSATIONS INTO CLIENTS

Today's challenge: Send 3 personalized follow-up videos texts today.

- New leads who haven't responded
- Past conversations that stalled
- Anyone who met you recently (open house, networking, etc.)

Goal: 3 genuine reconnections

Medium: BombBomb, CRM video, text, or Instagram DM

Outcome: A reply or conversation, not perfection

Why It Matters

1. Video increases response rates by 65–80%
2. People buy from people they can see
3. It turns your name into a memory
4. It builds emotional equity faster than words on a screen

How to Execute:

Step 1: Choose Your 3 Targets

Focus on:

Hot leads gone cold

Warm leads still deciding

People you've met within the last 30 days

Step 2: Record 3 Personalized Videos

📱 Use this proven 20–30 second structure: Smile, Keep it casual, One clear action, Record vertically for mobile

Hook (5 sec) "Hey [Name], just wanted to put a face to the name real quick!"

Value (10 sec) "I was thinking about your home search in [area] — a few new properties popped up that might be a fit."

OR "The market shifted a bit this week — and it might actually benefit you."

Call to Action (5–10 sec) "Would you like me to send those over?"

OR "Want to hop on a quick call to talk next steps?"

Step 3: Send & Track

- BombBomb (with tracking)
- CRM (Follow Up Boss, KVCore, Sierra)
- Video Text (preferred for speed)

Add "Video Sent" tag in CRM

Follow up in 24–48 hours with a simple text:

"Hey! Wanted to make sure that video came through, did you get it?"

Simple follow-up = fast response

Paste into ChatGPT:

"Write 3 short video follow-up scripts for real estate leads who stopped responding. Keep it warm, confident, and natural — like a conversation with a friend."

Moment of Meditation:

You have likely done things WAAAAY outside your comfort zone in the last few weeks.

What have you done recently that you were skeptical about, that had a bigger impact on you and your business than you ever expected?

Complete the Daily Charge Sheet on the next page.



LAUNCH YOUR BUYER GUIDE AND LINK IT EVERYWHERE

Today's challenge: Launch your Buyer Guide

1. **Customize and Create (PDF, landing page, or digital flipbook)**
2. **Create a shareable link with tracking**
3. **Add that link to every major client touchpoint**
4. **Promote it once publicly and once privately today**

Goal: Turn your Buyer Guide into a conversion tool, not a file folder.

Why It Matters

1. 70% of buyers start online but hire the first agent who adds value
2. Guides position you as a trusted advisor, not a salesperson
3. A consistent link builds brand recall and SEO
4. A shareable digital asset = daily lead generation
5. Buyers crave clarity, give it to them before someone else does.

How to Execute:

Step 1 Upload Your Buyer Guide

- Google Drive (set to "Anyone with the link can view")
- Canva Digital Flipbook (great for visual guides)
- Your Website (lead capture page preferred)
- Linktree / Bio Site (for quick access from social)

Step 2: Create a Trackable Link with tools like:

- Bitly (short + branded)
- Your CRM (link tracking)
- Google Analytics (source traffic)

Step 3: Link It Everywhere

- Website: Add to your homepage, blog sidebar, and contact page
- Email Signature: " Home Buyer Guide, Download Here"
- Social Media Bios: Instagram, Facebook, TikTok, YouTube, LinkedIn
- CRM Automations: Attach to your new buyer follow-up email sequence
- Text Templates: "Here's a free resource to help you navigate the process → [link]"
- QR Codes: Put on open house flyers, business cards, and community boards

Step 4: Promote It Today

I just updated my 2026 Home Buyer Guide, everything you need to know before your first showing. Tap the link in my bio or comment "GUIDE" to grab your copy.

Private Message Script:

"Hey [Name], I just updated my Buyer Guide for 2026 — it walks through financing, offers, and local insights. Want me to send it over?"

Public posts > builds awareness

Private send > builds relationships

Moment of Meditation:

You have almost made it! It's the final stretch. Today's meditation is all about feeling proud of what you have accomplished.

Every effort you have made in this journey has had a positive impact on your business.

Bask in the glory of what you have done!!!!

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CREATE AND SHARE A SUCCESS STORY

Today's challenge: Turn a real client experience into a story worth sharing everywhere.

1. Identify one recent success story
2. Write it using the Before > During > After framework
3. Share it on 3 platforms: social, email, and your CRM
4. Repurpose it into 1 reel or video story

Goal: 1 authentic success story > multiple trust touchpoints

Why It Matters

- People relate to results they can imagine themselves achieving
- Stories establish proof without bragging
- They turn data (like “sold in 5 days”) into emotion (“we helped a family start their next chapter”)
- They position you as both expert and advocate

Every story you tell builds your reputation before you walk in the room.

How to Execute:

1. Pick the Story: Choose a moment that reflects your values — fast sale, buyer breakthrough, or problem solved.

2. Use “Before > During > After”

Before: The problem or goal.

During: What you did differently.

After: The outcome + emotion.

3. Share It Publicly

Post Caption:

“When [Name] called me, they were ready to give up. We built a plan, new photos, new pricing, new energy. One week later, we were under contract. Real estate isn't luck. It's leadership.”

4. Repurpose It

- Turn into a short video or reel.
- Add to email newsletter.
- Use in social stories or testimonials.

One story = multiple platforms.

PS. If you haven't sold a house yet and you are new to our company use one of these subjects: Door Knocking, Off Market Property, Lending, Homebuilding, Education, First-Time Home Buyer.

Paste into ChatGPT:

Prompt:

“Write a short real estate success story about helping a frustrated seller close above asking. Tone: confident and human.”

Use AI to build drafts fast; you polish the emotion.

Moment of Meditation:

Why are you doing this program? What do you hope to get out of this?

Really think about it for a few minutes. What is holding you back from going for it...all the way?

When you know why you are doing something, you can push through the tough times.

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10. Ask for Review & Referral 1 2 3 4 5

11. 1 hour of personal care YES / NO

12. Farming/Door Knocking/Circle Prospecting/Open House/Marketing Events YES / NO

REVIEW OF MY DAY

Any Objections from my Clients?

How Can I handle the Objections and Prepare Better for Next time?

Appointments SET: Listing/Seller 1 2 3 4 5 Buyer 1 2 3 4 5

90 DAY CONSISTENCY & FOCUS FRAMEWORK

Today's challenge: You've done the work. You've rebuilt momentum. Now it's time to scale it. The next 90 days are where you turn action into identity. This is where agents separate from average by committing to what worked and compounding it.

1. Review your top 5 wins from the last 21 days.
2. Build your next 90-Day Focus Plan using the framework below.
3. Share it with your accountability partner, mentor, or broker.
4. Revisit it every 30 days.

Goal: Consistency > Confidence > Closings.

Why It Matters

1. Habits create stability in unpredictable markets.
2. Agents who plan quarterly outperform those who react daily.
3. Success is just discipline in disguise.
4. The next 90 days determine your next 12 months.

You've built the foundation, now it's time to scale your discipline.

How to Execute:

Step 1: Review & Reflect

Ask Yourself:

- Which activities created the most momentum?
- What habits improved your mindset or pipeline?
- Where did you see consistent engagement or results?

Write down your Top 3 Wins and Top 3 Lessons Learned.

Example: "Video follow-ups increased my response rate."
"Posting success stories built more engagement."

Step 2: Build Your 90-Day Fix Blueprint

Focus Area	Goal	Key Habit	Metric
Lead Gen	___ closings	___ convos/day	# Appts
Marketing	___ posts/week	Content calendar	Engagement
Systems	CRM follow-up daily	Automations active	Open Tasks
Growth	Training 1x/week	Track KPIs	Confidence

Step 3: Choose Your 90-Day Non-Negotiables

Write down 3 commitments you won't break:

- "Follow up daily — no skipped days."
- "Post 3x a week no matter what."
- "Track every lead in my CRM."

These are the habits that define your next level.

Step 4: Create Your Accountability System

- Assign one accountability partner.
- Schedule 15-min check-ins weekly.
- Review metrics, not feelings.

Step 5: Celebrate the Compound Effect

Plan a reward for completing your 90-Day Fix. It doesn't need to be big, just meaningful.

Example: Dinner out, weekend trip, new camera, or your favorite bottle of champagne 🍾

Reward discipline. It trains your brain to crave momentum.

Want Some AI Assistance?

Paste into ChatGPT:

"Create a 90-day real estate business plan focused on consistency in marketing, lead follow-up, and content creation. Include weekly milestones and KPI targets."

Bonus Prompt:

"Generate 10 weekly accountability check-in questions for real estate agents to track progress and mindset."

Task	Goal	Done
90-Day Plan Completed		<input type="checkbox"/>
Accountability Partner Assigned		<input type="checkbox"/>
Weekly Check-Ins Scheduled		<input type="checkbox"/>
Non-Negotiables Set	3	—
Reward Planned		—