🔎 OVERVIEW

Lead Conversion Mastery

Welcome, Social Agents!

You're about to dive into our **5-Day Lead Conversion Mastery Course**, an action-packed mini-course inside Social Agent Academy—focusing 100% on converting more leads in less time. Each day, we'll cover key modules, do quick tasks, and share wins in our Circle community. By Day 5, you'll have a bulletproof system for rapid response, consistent follow-up, and unstoppable momentum! 🚀

How It Works

- **Daily Mini-Lessons (10–20 mins)**

- Videos or live sessions summarizing the day's core concepts.

- **Short Workbook Tasks (30–60 mins total)**
    - You'll apply the lessons *immediately*—no fluff, just real action on your CRM, offers, scripts, etc.
- **Community Check-Ins (on Circle!)**
    - Post your daily progress, share screenshots, ask questions, and celebrate successes.

➡️**Time Investment:** About 1.5 hour/day
➡️**Outcome:** A fully installed lead-conversion engine—brand, offers, scripts, follow-up sequences, referral strategies, and more!

5-Day Breakdown

Day 1: Mindset, Brand & Your No-Brainer Offer

- Embrace the new real estate landscape (mindset + market shift)
- Craft a concise personal brand statement (stand out from the noise!)
- Build an "unbeatable" offer stack (value bonuses + risk reversal)
- Action: Update your Circle profile or social bios with your brand statement, finalize your offer stack's top bonus & guarantee

Day 2: Speed-to-Lead & Ideal Client Attraction

- Set up <5 min response systems (CRM alerts, text templates)

- Map your buyer/seller funnel & create a simple piece of “pre-selling” content
- Identify emotional triggers for your ideal clients—speak to their real motivations
- Action: Confirm CRM notifications, share 1 short “funnel-aligned” post on Circle or social

Day 3: Discovery Calls & Objection Mastery

- 4-step call flow (Warm-Up → Qualify → Value → Next Step)
- Quick, proof-rich presentations (for buyers/sellers) that handle typical pushback (commission, “need time,” etc.)
- Advanced closing frames to highlight net value, not commission
- Action: Draft a 2–3 slide pitch deck, memorize lines for top 3 objections, post a snippet in Circle for feedback

Day 4: Follow-Up, Nurture & Team Handoffs

- Segment leads (hot/warm/cold), set consistent follow-up tasks
- Longer-term nurture campaigns for “not yet” leads (6–12 months)
- If relevant: a team/assistant SOP to handle leads at scale
- Action: Tag your leads in CRM by priority, set monthly/bi-weekly check-ins, share your updated follow-up plan with the group

Day 5: Referral Partners & Ongoing Growth

- Simple scripts for building referral partner relationships (lenders, local biz, out-of-area agents)
- Rinse, repeat & scale: track core metrics (# leads, # appointments, # closes)

- Embrace future innovations (AI, new social platforms) + finalize your 90-day plan
- Action: Send 2–3 referral outreach messages, pick 3 metrics to track weekly, and commit to your next 90 days of daily habits

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What You'll Walk Away With

➡️**<5 Min Lead Response:** Never lose a potential client due to slow follow-up.

➡️**Irresistible Offer Stack:** Free staging consult, risk-reversal guarantee, or anything that wows prospects.

➡️**Confident Discovery Calls:** A 4-step script that quickly qualifies leads, plus easy objection handling.

➡️**Organized Follow-Up & Nurture:** Hot/warm/cold tagging + monthly or bi-weekly check-ins so no lead falls through cracks.

➡️**Referral Power:** Quick templates for building a stable referral network (local lenders, businesses, out-of-area agents).

➡️**90-Day Growth Plan:** A simple daily/weekly tracker to keep the momentum (speed-to-lead, follow-up calls, new content).

Daily Routine

1. Watch/Review the day's mini-lesson (posted in Circle).

2. **Complete the workbook tasks (1–2 pages).**

3. **Post your progress in Circle.**

4. **Connect with your peers: ask for feedback, share tips, and keep each other motivated.**

💡**Remember:** **This is about implementation—not just passive learning. Let's crush your conversion goals in the next 5 days together.**

Can't wait to see your wins posted in Circle!

❓ **Any questions?** Drop them in Circle, and let's make lead conversion your new superpower!

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🔴 Day 1

SOCIAL AGENT ACADEMY

DAY 1:

MINDSET, BRAND, & YOUR NO-BRAINER OFFER

Daily Focus

1. **Market Shift & Mindset** – Why conversion is king in today's market.

2. **Personal Brand** – Clarify who you serve, your unique story, and your brand values.

3. **Unbeatable Offer** – Craft a short "value stack" (bonuses + risk reversal) that wows clients.

4. **Proof Stacking** – Collect a few testimonials or success stories to back up your claims.

1. Mini-Lesson Summaries

A. Market Shift & Mindset

- **Key Point:** The 2025 real estate landscape is crowded—plenty of agents, fewer "easy" leads. Conversion (not just lead gen) is the difference between struggling and thriving.

- **Reflect:** Are you chasing endless new leads, or focusing on converting the ones you have? A slight mindset shift can open big results: "Every lead is a real person who needs my help."

B. Personal Brand

- **Key Point:** Your brand is more than logos or colors. It's why you do real estate, who you serve, and how you're different.

- **Simple Formula:** "I help [TARGET CLIENT] achieve [DESIRED OUTCOME] by [UNIQUE APPROACH]."

Example: "I help first-time buyers in [City] find stress-free deals by simplifying mortgages and offering free closing-cost consults."

💡**Pro Tip:** Keep it human. People remember authenticity over perfect buzzwords.

C. Unbeatable Offer

• **Key Point:** A “value stack” + risk reversal turns your proposition into a “no-brainer.”

➡️**Value Stack:** Bonuses like a free staging consult, pro photography, or a home warranty.

➡️**Risk Reversal:** E.g., “Cancel Anytime,” “Sold in 30 Days or I cut my commission,” or “Love It or Leave It” buyback for buyers.

❓**Why it Works:** When clients see *tons of value* with *minimal risk*, they say “yes” quickly.

D. Proof Stacking

• **Key Point:** Real testimonials, screenshots, or short case studies give you instant credibility.

• **Tip:** Gather at least 3 short success stories: “The Smith Family sold 10% above asking in 5 days with our marketing.”

• **Storage:** Create a “Proof Vault” folder in Google Drive or Dropbox for easy access.

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2. Day 1 Workbook Tasks

1. ### Mindset Reflection

• Write 2–3 sentences on why focusing on conversion could drastically boost your business (instead of chasing new leads).

➡️**Optional:** Jot down your top 2 lead-conversion challenges (slow response time? No unique value?).

2. **Brand Statement**

- **Prompt: Fill in the blanks:**
  I help _____ (type of client) achieve _____ (goal) by _____ (unique approach).

➡️Keep it short and relatable.

3. **Offer Stack**

- List 1–2 bonuses you can realistically provide (e.g. free staging consult, pro photography).
- Choose 1 risk reversal or guarantee that handles your clients' biggest fear (e.g., "Cancel Anytime" or "Sold in 30 Days or 25% commission discount").

4. **Proof Vault (Start)**

- Name 3 past clients or success stories you can quickly reference (e.g. "Jane, sold condo over asking," "Jake, first-time buyer who saved $5k").
- Place any screenshots, testimonial videos, or quotes into a single folder (Google Drive/Dropbox).

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3. Day 1 Action Items

- **Update Your Circle Profile or Social Bios**

- Insert a line from your new brand statement ("I help first-time buyers in Denver find stress-free homes!").
- Keep it friendly and authentic.

- **Lock In Your Offer Stack**
  - Choose 1 main bonus + 1 guarantee.
  - Write them out in a quick bullet form so you can mention them on calls.
- **Begin Your Proof Vault**
  - Grab at least one testimonial or screenshot tonight.
  - Put it in your designated "Proof Vault" folder. Don't overthink it—just pick your best success story so far.
- **Circle Check-In Post**
  - Share your brand statement + the bonus/guarantee you've decided on.

    E.g. "Here's my new brand statement: I help _____ … My Offer Stack = Free staging consult + 'Cancel Anytime' guarantee. Let's goooo!"

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4. Group Check-In Prompt

- Time: [Set a consistent time—maybe 7pm or 8pm local]
- What to Post in Circle:
  1. Brand Statement (1–2 lines)

2. **Chosen Bonus + Guarantee**

3. **At Least One testimonial snippet or mention (e.g. “The Smith family who sold over ask in 5 days!”)**

➡️**Encourage Each Other:** **If you see a peer’s brand statement, give quick feedback or an emoji reaction. High-fives all around!** 🙌

Reminders & Tips

- **Keep It Simple:** Don’t build a massive offer stack—just pick 1–2 bonuses. Quality over quantity.

- **No Perfect Words Needed:** For your brand statement, authenticity matters more than fancy phrasing.

- Tomorrow (Day 2) is all about Speed-to-Lead & funnel mapping—get pumped!

You’ve got this! Dive into Day 1’s tasks, and post your progress. Let’s make your brand + offer so compelling that when leads appear, they can’t wait to say yes!

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🔴 Day 2

DAY 2:
SPEED-TO-LEAD & IDEAL CLIENT ATTRACTION

Daily Focus

1. **Social Positioning & Content** – Using short/long-form content to "pre-sell" leads.

2. **Ideal Client & Emotional Triggers** – Know who you serve & what makes them say "YES!"

3. **Buyer/Seller Funnel Mechanics** – Map out each stage (Discovery → Consideration → Decision).

4. **Speed-to-Lead** – <5 min response system + initial scripts to engage new leads fast!

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1. Mini-Lesson Summaries

A. Social Positioning & Content

• **Key Point: Content** = trust-builder. When leads watch your market updates, home tours, or local tips, they already see you as an expert.

• **TOFU / MOFU / BOFU Content:**

- Top of Funnel (TOFU): Broad “neighborhood tours” or “Top 10 Reasons to move to (City)” to attract wide interest.
- Mid-Funnel (MOFU): More detailed Q&A, buyer/seller tips, or proof-driven content to nurture folks who are researching agents.
- Bottom-Funnel (BOFU): Direct property walkthroughs, special guarantees, clear CTAs like “Book an Appointment.”

• **Quick Strategy:** Post 1 piece of “Helpful Info” content weekly—like “Market update in 60 seconds” Reel or TikTok.

B. Ideal Client & Emotional Triggers

• **Key Point:** Different clients respond to different triggers (Security, FOMO, Lifestyle, Family, etc.). Know your niche’s biggest motivators.

• **Worksheet:** “Customer Avatar” – Age, location, typical budget, main worries, top desires.

❓ **Why It Matters:** When you speak directly to their fear of “missing out on a great deal” or their dream of “providing a safe home for the kids,” you’ll connect faster.

C. Buyer/Seller Funnel Mechanics

• **Core Stages:** Discovery (awareness), Consideration (research & comparison), Decision (ready to pick an agent & act).

• **Your Role at Each Stage:**

- Discovery: Offer “light” info or free guides (Neighborhood highlights, short videos).

- Consideration: Show proof/testimonials, hold consultations, share advanced tips.
- Decision: Present your “No-Brainer Offer” & close the deal.

💡**Pro Tip:** A simple lead magnet (free home value estimate or buyer checklist) can move them from “Discovery” to “Consideration” quickly.

D. Speed-to-Lead

- **Key Point:** Responding in <5 minutes can double or triple your chance of converting a new inquiry.

- **3 Steps:**
  - Notification Setup (phone, CRM, email pings)
  - Immediate Script (e.g., “Acknowledge, Align, Invite”—“Thanks for reaching out! Totally get what you’re looking for. Let’s chat for 5 minutes to see how I can help.”)
  - Next Step (discovery call or in-person meet)
- **Mindset:** Don’t wait till “later”—they’ll talk to someone else if you don’t jump.

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2. Day 2 Workbook Tasks

- **Map Your TOFU → MOFU → BOFU Content**

➡️Prompt: In a simple 3-column table, list at least 1 content idea for Top of funnel, Mid funnel, and Bottom funnel.

Example: TOFU = 1-min neighborhood reel, MOFU = short client Q&A video, BOFU = direct “Listing Consultation” invite.

- **Ideal Client Avatar**

  ➡️**Fill 3–5 lines on who you truly want to serve (demographics, biggest pain points, dream outcome).**

  ➡️**Identify at least 1 emotional trigger (Security? Family lifestyle? FOMO on interest rates?).**

- **Buyer/Seller Journey**

  ➡️**Sketch or bullet:**

  - **Discovery Stage:** how leads find you (social, ads, door knocking?).
  - **Consideration Stage:** which proof or info you’ll share (testimonials, an off-market list?).
  - **Decision Stage:** how you present your offer stack & request the commitment.

- **Speed-to-Lead Checklist**

  ➡️**Confirm your CRM or phone notifications are ON (test with a friend?).**

  ➡️**Write a 1–2 line immediate text/call script.**

  E.g.: “Hey [Name], thanks for reaching out about [property/topic]! Excited to learn more about your goals—when’s a good time for a quick 5-min chat?”

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3. Day 2 Action Items

1. **Post 1 “Funnel-Aligned” Content Piece (Optional but powerful)**
    - Could be a quick social media post (TOFU), a “client Q&A” story (MOFU), or a direct CTA for an appointment (BOFU).
    - If you’re tight on time, draft it today and post tomorrow—but aim to do something that moves the needle.
2. **Test Your Notifications**
    - Ask a friend or a colleague to fill out a form on your website or DM you.
    - Make sure you receive the lead alert instantly and can respond in under 5 minutes.
3. **Short Script for First Response**
    - Memorize or write on a sticky note near your phone.
    - When a lead pops up, use that quick line to greet them and set up the next step.
4. **Circle Check-In**
    - Share your TOFU → MOFU → BOFU content ideas (just 1 line each).
    - **Optional:** If you posted a quick piece of content, drop the link or screenshot so we can cheer you on!

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4. Group Check-In Prompt

Time: [same daily huddle time]
What to Post in Circle:

1. **Your 3 funnel ideas (TOFU, MOFU, BOFU)**
2. **Your #1 Emotional Trigger for your ideal client**
3. **Confirmation that your notifications are tested & live (Yes/No)**
4. **(Optional) If you posted content, share the link or screenshot!**

➡️**Cheer Each Other On:** Don't forget to give a thumbs-up or quick comment on your peers' posts—they might inspire new funnel ideas for you, too. 🤝

Reminders & Tips

- **Keep it Real:** Your ideal client description can be simple—just enough to visualize who you're talking to.
- **Small Bites:** If you don't have time to finalize everything, do the critical parts first (test your speed-to-lead!!) and pick up the rest tomorrow.
- **Tomorrow (Day 3):** We tackle Discovery Calls & Objection Mastery—get ready to boost your confidence on every single lead conversation!

Rock On & See You in Circle!

Smash those Day 2 tasks, and post your funnel ideas!

Let's speed up your lead response while shaping content that attracts the perfect client. Keep the momentum going—you've got this! 😉

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🔴 Day 3

DAY 3:
DISCOVERY CALLS, PRESENTATIONS & OBJECTION MASTERY

Daily Focus

1. Discovery Call – A simple 4-step flow to qualify and build trust fast.

2. Presentation & Objections – Short listing/buyer presentations + top objection scripts.

3. Advanced Closing – Emphasizing net value, not just commission, plus final “Hormozi-style” push.

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1. Mini-Lesson Summaries

A. Discovery Call

- **4 Steps:**

1. Warm-Up: **Quick rapport. Ask a friendly question or reference how they found you.**
2. Qualify: **Budget, timeline, mortgage pre-approval, or existing home to sell?**
3. Deliver Value: **Mention a relevant tip ("Here's how we streamline showings..."), partial proof if needed.**
4. Next Step: **Book an in-person consult, or proceed to your presentation.**

❓ **Why It Matters:** A structured call means no wasted time, and leads feel you truly get them.

B. Presentation & Objections

- **Short Presentation:**
  - **1–2 slides/pages covering your brand promise, offer stack, and proof.**
  - **End with a clear CTA: "Ready to list?" or "Ready to start home tours?"**
- **Objection Handling:**
  - **Common pushbacks: "Commission too high," "We need time," "We're interviewing other agents," etc.**

💡 Pro Tip: **Address them before they arise by weaving your solution into the presentation.**

Script example: "I understand you want to compare. I'd do the same. Here's how my marketing approach consistently nets sellers above asking… *[cue proof]*."

C. Advanced Closing

- **Focus on Net: Show how your approach yields a higher sale price (for sellers) or better deal (for buyers), so commission is an investment.**

- **Reinforce Value Stack: Make sure they see the tangible benefits + intangible (peace of mind).**

- **Hormozi-Style: Heap on the value until "no" feels silly. E.g., staging consult, pro photography, risk reversal… "Still have any concerns?"**

- **Cues to Watch For: If they're nodding or saying "Yes, that makes sense," go for the close.**

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2. Day 3 Workbook Tasks

1. **Discovery Call Outline**
    - **Write a short bullet list for each step:**
        - **Warm-Up: (Sample question you'll ask)**
        - **Qualify: (Key question to uncover motivation)**
        - **Deliver Value: (One quick "knowledge bomb" you can drop)**
        - **Next Step: (Your CTA, e.g. "Would you like to see how that works in detail?")**
2. **Mini-Presentation Draft**

- Outline 2–3 slides/pages:
    - Slide 1: *Brand Promise + Quick Hello*
    - Slide 2: *Offer Stack + 1 Proof** (testimonials or quick success stat)
    - Slide 3: *Clear CTA + Guarantee*
- Keep it short & sweet—like a conversation guide, not a 50-page deck.

3. **Objection Script**
    - List the top 3 objections you hear most often.
    - For each, write a 2–3 line response.
    - E.g. "I totally understand needing time; many of my clients felt the same, until they saw how the market's short supply actually benefits them right now."
4. **Advanced Closing "Net Focus"**
    - Brainstorm 1 bullet on how you'll explain the "net benefit" to a typical seller or buyer.
    - E.g.: "My marketing usually nets sellers 2–3% above average sale price in this neighborhood, which more than covers my commission difference."

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3. Day 3 Action Items

1. **Role-Play a Discovery Call**

- Grab a buddy from Circle (or a friend IRL) and walk through your 4-step call outline.
- Focus on listening & responding, not just reading a script.

2. **Finalize Your 2–3-Slide (or Page) Presentation**
   - Add your brand statement, 1–2 proof snippets, offer stack, and CTA.
   - Keep it ready for any lead who's ready to go deeper.
3. **Practice 1 Objection Out Loud**
   - Pick your #1 dreaded objection (e.g., "Commission is too high").
   - Say your script 3 times so it feels natural and confident.
4. **Circle Check-In**
   - Share a quick snippet of your mini-presentation or one objection script you feel proud of.
   - E.g., "Here's the first slide of my listing pitch… plus my 'Commission' script below!"

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4. Group Check-In Prompt

Time: [Your daily huddle time]
What to Post in Circle:

1. Your Discovery Call Outline (short bullet form)

2. **A Slide or Screenshot from your mini-presentation (or a short text version if you prefer)**

3. **One Objection Script you created ("Commission is too high: [Your 2–3 line response].")**

4. **(Optional) Did you do a role-play? How did it feel?**

➡️**Encourage each other with feedback or small tips**. If you see a script you love, say so!

Reminders & Tips

- **Keep It Conversational:** The best "scripts" sound like real talk, not a salesy monologue.

- **Confidence Trumps Perfection:** If you stumble, keep going—your genuineness often matters more than the exact words.

- **Tomorrow (Day 4):** We dive into Follow-Up & Nurture—ensuring no lead falls through the cracks!

Go Rock Day 3 and get comfy handling every call, presentation, and objection that comes your way. You got this—and we're cheering you on in Circle! 🤩

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🔴 Day 4

DAY 4:

FOLLOW-UP, NURTURE & TEAM HANDOFFS

Daily Focus

1. **Systems for Consistent Follow-Up** – Tagging hot/warm/cold leads + building a bulletproof routine.

2. **Nurture Campaigns** – Keeping "not yet" leads engaged for months until they're ready.

3. **High-Volume Flow & Team Handoffs** – SOPs for managing leads if you have (or plan to have) a VA, ISA, or fellow agents.

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1. Mini-Lesson Summaries

A. Systems for Consistent Follow-Up

- Key Point: Most agents *know* follow-up is vital but lack a structured plan.

- Hot/Warm/Cold Tagging:

    - Hot: Ready 0–3 months → weekly touches (calls, texts, personal updates).

    - Warm: 3–6 months → bi-weekly or monthly calls, plus a short drip campaign.

    - Cold: 6+ months → monthly or quarterly check-in, minimal effort but not forgotten.

• CRM Setup: Automate tasks or reminders. E.g., “When I tag ‘hot,’ auto-create weekly call tasks.”

B. Nurture Campaigns

• Key Point: Some leads might take 6–12+ months to decide. Your job? Stay top-of-mind with gentle, value-filled touches.

• Longer Drips & Touches:

  ○ Monthly newsletter or market update

  ○ Personal text every 2–3 months (“Hey, just checking in—how’s your timeline looking?”)

  ○ Occasional “helpful content” like local events or interest rate changes

• Mindset: You’re planting seeds. Even if they’re “not ready,” they remember you *didn’t forget* them.

C. Handling High-Volume Lead Flow & Team Handoffs

• Key Point: When leads ramp up, you might bring on an ISA (Inside Sales Agent) or a Buyer’s Agent. You need a clear handoff SOP.

• Simple SOP:

  1. Lead Arrives → ISA or designated person calls within 5 mins.

  2. Qualify → Tag as hot/warm/cold, add notes to CRM.

  3. Assign → If hot buyer? Possibly pass to buyer’s agent. If listing? Pass to you or listing specialist.

  4. Track → Log every interaction so no confusion.

- Brand Consistency: Ensure your team uses the same scripts and tone so leads get a uniform experience.

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2. Day 4 Workbook Tasks

- **Tagging Exercise**
    - Look at your current lead list (CRM, spreadsheet, etc.).
    - Assign at least 5 leads to “Hot,” “Warm,” or “Cold.”
    - *Note:* Decide how frequently you’ll contact each category (weekly, bi-weekly, monthly, etc.).
- **Nurture Blueprint**
    - Create a 6-month timeline with at least 4–6 touches for “not yet” leads.
        - For example:
            - Month 1: Market update email
            - Month 2: Quick text check-in
            - Month 3: Social invite or local event mention
            - etc.
- **Team/ISA SOP (If Applicable)**
    - If you already have (or plan to have) an assistant or buyer’s agent:
        - Write a short bullet SOP: “Step 1: Speed-to-lead call by ISA…” etc.

- If you're solo, *just outline* what you'd do if volume skyrockets in 3 months.

- **Brand Consistency**
  - If working with a team, confirm they have your brand statement, top scripts, and your value stack to keep messaging aligned.

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3. Day 4 Action Items

1. **Tag at Least 5 Current Leads**
   - Go into your CRM or wherever you track leads. Label them hot, warm, or cold.
   - Set the next follow-up date for each.
2. **Draft a 6-Month Nurture Plan**
   - For those "not ready yet," choose your touch points (emails, texts, event invites).
   - Keep it simple. Just bullet 4–6 interactions.
3. **(Optional) Team SOP**
   - If you have an ISA/assistant or plan to soon, create a quick 4–5 step process for how new leads get assigned + how notes are updated.
4. **Circle Check-In**
   - Post at least 1 snippet of your newly tagged leads (e.g., "I realized I have 8 'warm' leads I've been ignoring!").

- If you made a “Nurture Timeline,” share a quick overview.
- If you have a team, show us your short “Handoff SOP.”

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4. Group Check-In Prompt

Time: [Your daily huddle time]
What to Post in Circle:

1. **Your lead tagging (Example: “Tagged 5 leads: 2 hot, 3 warm!”)**
2. **Nurture plan highlights (like “Month 1: Local market update, Month 2: quick text…”)**
3. **Team SOP snippet if relevant**
4. **(Optional) Observations: “I found so many cold leads who might bloom later—excited to keep them warm now!”**

Reminders & Tips

- **Simplicity Wins:** Don’t overcomplicate your follow-up. Even a single monthly text is better than nothing!
- **Use Your Proof:** When you follow up, occasionally drop a success story or relevant testimonial to remind them you’re the go-to agent.

- **Tomorrow (Day 5):** We handle Referrals & 90-Day Growth—wrapping up all your daily habits & expansions.

Keep Leading the Way! Tag your leads, set your nurture plan, and watch your pipeline strengthen. Post your progress in Circle—and see you tomorrow! 😃



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🔴 Day 5

DAY 5:
REFERRALS, SCALING & YOUR 90-DAY GROWTH PLAN

Daily Focus

1. **Leveraging Partnerships & Referrals** – Simple scripts to expand your lead sources.

2. **Rinse, Repeat & Scale** – Document SOPs & track key metrics for ongoing success.

3. **Future Innovations** – AI tools, new social platforms, constant reinvention.

4. **Conclusion & 90-Day Action Plan** – Lock in your daily/weekly habits so your system thrives long-term!

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1. Mini-Lesson Summaries

A. Partnerships & Referrals

- Key Point: Referral-based leads often have *higher trust* and better closing rates.

- Who to Partner With?:
    - Local lenders, home inspectors, or staging pros
    - Local businesses (coffee shops, salons, etc.)
    - Out-of-area agents (for relocations)
- Scripts:
    - A short email/DM: “Hey [Name], my clients often ask me about [service]. Let’s chat about referring each other!”
- Referral Tracking: Keep a simple log: date, who referred whom, outcome, and a “thank you” step.

B. Rinse, Repeat & Scale

- Document SOPs:
    - Speed-to-Lead steps
    - Discovery Call flow
    - Follow-Up tagging

- Track Key Metrics: (# leads, # appointments, # conversions). Weekly or monthly check.
- Why: If you want consistent closings, treat your process like a *repeatable machine*—not random heroics.

C. Future Innovations

- **Stay Ahead:**
  - AI chatbots for instant replies
  - TikTok/Reels for short real estate tips & local insights
  - Potential new CRMs or predictive analytics tools
- **Mindset:** You're never "done." Keep testing new platforms or strategies that keep you top-of-mind in your market.

D. 90-Day Action Plan

- Core Idea: The next 3 months = daily/weekly habits that cement your system.
- **Examples:**
  - Daily: Speed-to-Lead for new inquiries, 3–5 follow-up calls
  - Weekly: Post 1 piece of content (TOFU/MOFU/BOFU) + check metrics (# new leads, # appointments)
  - Monthly: Quick referral partner check-in + update any SOP changes
- Goal: Make lead conversion second nature, not a one-time sprint.

2. Day 5 Workbook Tasks

1. **Referral Partner Outreach**

    - List 2–3 local or out-of-area professionals you could connect with.

    - Write a short message script. Example:
    "Hey [Name], I'd love to team up and send referrals your way. Let's schedule a quick coffee call—my clients often need a great [lender/inspector/etc.]!"

2. **SOP Quick Start**

    - Pick 2–3 processes you do often (e.g. "New Lead Response," "Discovery Call," "Hot Lead Follow-Up").

    - Write a short bullet SOP for each (3–5 steps).

    - Example:

        - New Lead Response

            1. Notification → respond <5 min with text or call
            2. Acknowledge, Align, Invite script
            3. Qualify in CRM → Tag hot/warm/cold
            4. Set next follow-up date

3. **Metric Tracking Template**

    - Decide 3 metrics you'll watch weekly (e.g. # leads, # appointments, # closings).

- Jot them in a simple table:

letric	Last Week	This Week	Goal
Leads			
Appointments			
Closings			

- Commit to filling it in every Monday.

4. **90-Day Growth Plan**
   - Outline the daily (speed-to-lead, follow-up calls) + weekly (content, referral outreach) + monthly (SOP reviews, metrics check) tasks.
   - Keep it realistic. Focus on the top 3–4 big wins.

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3. Day 5 Action Items

1. **Send 2–3 Referral Outreach Messages**
   - Could be local lenders, out-of-area agents, or any biz that complements real estate.

- Keep it short & friendly. Mention you'd love to swap referrals or collaborate.

2. **Create/Update 2 SOPs**
    - Pick two high-impact processes: "Speed-to-Lead," "Objection Handling," or "Discovery Call."
    - Write them as bullet steps in a doc or Google Drive. Congratulate yourself: you're becoming a systematic pro!
3. **Pick Your 3 Key Metrics**
    - Decide which 3 you'll track weekly (or monthly).
    - Make a note in your phone or CRM to fill them in on a set day/time each week.
4. **Finalize Your 90-Day Plan**
    - Quick bullet list:
        - Daily tasks (calls/texts)
        - Weekly tasks (content, referral check)
        - Monthly tasks (metrics review, SOP update)
    - This ensures you don't lose the momentum you built this week!
5. **Circle Check-In**
    - Share who you reached out to for referrals (or who you plan to).
    - Drop a snippet of your SOP or a quick screenshot.
    - Briefly mention your 3 key metrics or your daily/weekly plan.

4. Group Check-In Prompt

Time: [Your usual daily huddle time]
What to Post in Circle:

1. **Your referral outreach (just mention “I messaged 2 lenders!” or “I emailed a coffee shop owner!”)**

2. **At least 1 SOP you created/updated (bullet points)**

3. **Your chosen 3 metrics (like “# leads, # apps set, # closings” etc.)**

4. **One daily or weekly habit you’re committing to for the next 90 days**

Celebrate each other’s final day achievements! We’re almost there! 🎉

Reminders & Tips

- **Keep Going:** This 5-day sprint jumpstarts your conversion process. The real magic happens when you apply these routines every week.

- **Review & Adapt:** If a certain SOP or script isn’t clicking, tweak it. That’s the joy of having a system: you can improve step by step.

- **Stay Engaged:** Even after Day 5, keep posting in Circle. We’ll do a short “post-sprint check-in” in a couple of weeks to see your wins

and refine strategies.

You Did It!

High five—you've completed the 5-Day Implementation Sprint!

You've tackled mindset, brand, offers, speed-to-lead, discovery calls, presentations, follow-up systems, referrals, and a 90-day plan. In just one week, you've set a powerful foundation to close more deals consistently. Keep fueling that momentum in Circle—we're here to support you every step of the way.

Cheers to your ongoing success! 🥳

SOCIAL AGENT ACADEMY

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