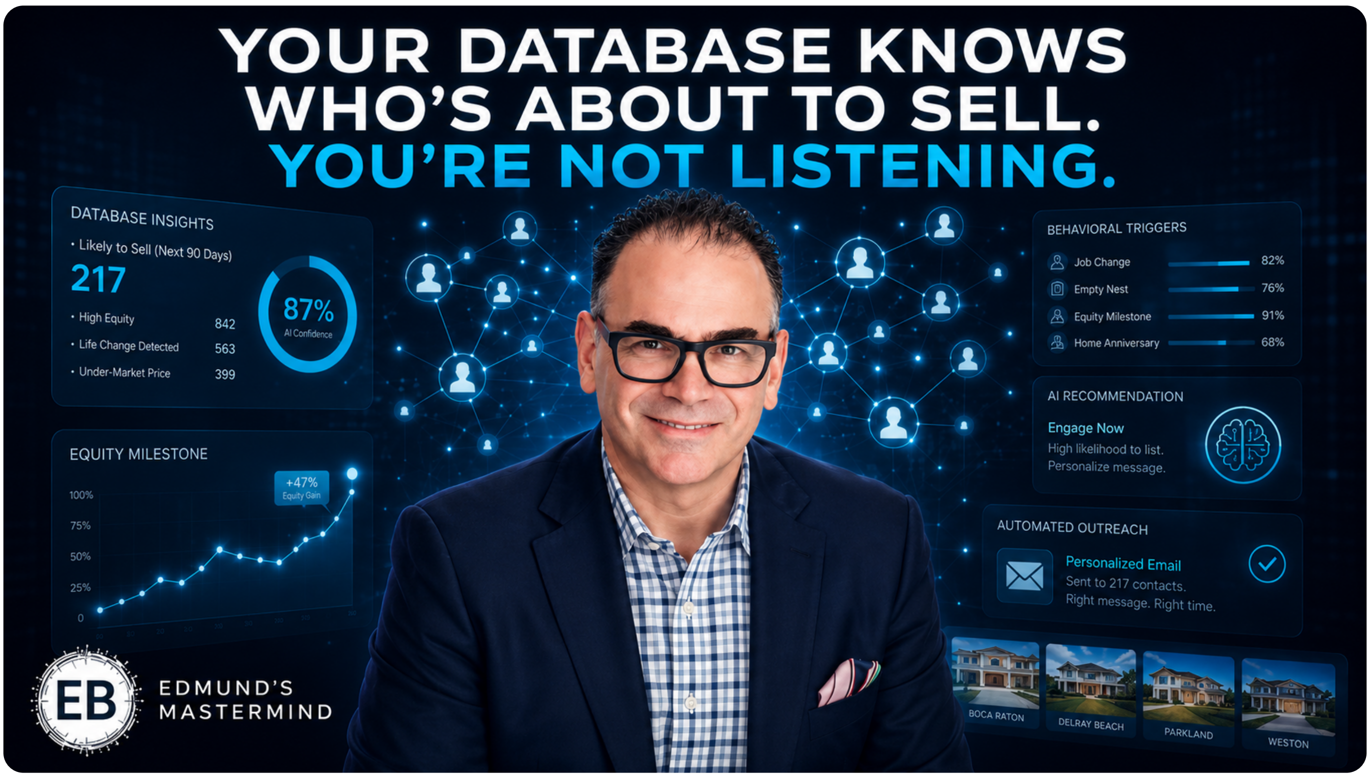

Complete Implementation Workbook

Edmund's Mastermind & Group Coaching

YOUR MONEY-MAKING MISSION

Your database is your most valuable asset

Why you're here: Your database is the single most valuable revenue asset you own — and right now it's underperforming because you treat 1,000 contacts like one audience. Today you fix that. You'll build systems that make every contact feel personally known, at the scale of your entire list, without adding hours.

Your goal today: Leave with three working personalization systems wired into the CRM you already use — and the exact prompts to run them.

Success metric: Within 30 days, deploy at least one behavioral trigger and measure a lift in reply/engagement rate from your re-engaged segment. Target: reactivate 10+ dormant contacts and book 2+ new appointments from automated personalization.

WORKSHOP OVERVIEW — YOUR PROFIT-GENERATING TOOLKIT

The 3 systems you'll master today:

- **The Behavioral Listing Matchmaker** — Routes the right listing to the right buyer based on what they actually click and revisit. *(Easiest — start here.)*
- **The Equity-Milestone Seller Trigger** — Times your seller outreach to financial and life milestones so you reach them the week they're ready to list.
- **The AI Clone Re-Engagement Video** — Fires a personalized video in your voice when a cold lead returns to your site. *(Advanced — build last.)*

The spine of all three: specific behavioral signal → automated response → revenue moment captured. Once you understand the pattern, you can build personalization triggers for any segment.

SYSTEM 1

The Behavioral Listing Matchmaker

THE $50K GUESSWORK KILLER

WHAT THIS MEANS FOR YOUR BANK ACCOUNT

- Stop losing buyers to agents who showed them the right home first
- Convert passive database contacts into active showings — automatically
- Recover commission you're leaving on the table from "cold" leads who are actually warm

THE BEHAVIORAL TECHNOLOGY BEHIND YOUR CONVERSION LIFT

Every modern CRM and email platform tracks engagement data you're probably ignoring: which listings a contact opens, how many times they revisit a property page, what price band they keep returning to, which neighborhoods they linger on. This is intent data — far more predictive than anything a buyer tells you in an intake form, because behavior doesn't lie.

The matchmaker turns that signal into action. Instead of one weekly "new listings" blast to everyone, you set rules: when a contact views waterfront listings twice in seven days, they automatically get a curated set of matching properties — within hours, not at the next newsletter cycle.

THE EARLY-ADOPTER ADVANTAGE

Most agents won't touch behavioral automation for another 6–12 months — they think it requires a developer or an expensive new platform. It doesn't. The moment you deploy it, you operate on a different level than your entire local competition, and the moat widens every week your system learns more about your database.

REAL REVENUE APPLICATIONS

- Auto-route waterfront viewers to matching inventory the same day
- Trigger a "price just dropped" alert only to contacts who viewed that exact listing
- Surface buyers who suddenly increased their browsing price band
- Re-engage anyone who revisited a listing 3+ times but never inquired
- Flag your hottest 10 buyers each week for a personal call

SYSTEM 1 — PROFIT-GENERATING PROMPTS

Copy these into your AI assistant

MAP YOUR CRM'S BEHAVIORAL SIGNALS

```
I use [CRM NAME] for my real estate database. List every behavioral and engagement data point it can track on a contact (email opens, link clicks, page views, listing views, form activity, etc.). Then rank them by how predictive each is of buyer intent, and tell me which ones I can build automated triggers on.
```

BUILD THE TRIGGER RULES

```
Help me design behavioral trigger rules for my buyer database in [CRM/EMAIL PLATFORM]. For each rule, specify: the trigger condition, the automated action, the timing, and the message angle. Start with these scenarios: (1) contact views the same listing 3+ times, (2) contact views 2+ listings in one neighborhood in a week, (3) contact's browsing price band increases. Keep it implementable without a developer.
```

WRITE THE MATCHED-LISTING MESSAGE

```
Write a short, personal email that goes out automatically when a buyer revisits a waterfront listing. It should feel hand-written, reference their apparent interest without being creepy, include 2-3 matching listings, and end with a low-friction CTA to book a showing. Give me 3 subject line options. My tone: [warm/professional/luxury].
```

THE WEEKLY HOT-BUYER REPORT

```
Design a weekly automated report that surfaces my 10 highest-intent buyers based on behavioral signals in [CRM]. Define the scoring logic (recency, frequency, price-band consistency) and format it as a prioritized call list with a one-line "why now" for each contact.
```

YOUR SUCCESS NOTES

Specific ways I can use this for my business:

____

____

Deals currently lost to faster agents per month: ______ · Recovered commission potential: $______ / mo

First 3 triggers I'll build this week:

- [ ]
- [ ]
- [ ]

SYSTEM 2

The Equity-Milestone Seller Trigger

THE SIX-FIGURE TIMING KILLER

WHAT THIS MEANS FOR YOUR BANK ACCOUNT

- Reach sellers the week they're ready — not after a competitor already listed them
- Convert your past-client database into a predictable listing pipeline
- Win listings on relationship and timing instead of competing on commission

THE PSYCHOLOGY BEHIND MILESTONE-TIMED OUTREACH

Sellers don't decide to move because you sent a newsletter. They move when their situation changes: their equity crosses a threshold that funds the next purchase, their kids leave for college, they hit a refinance window, a job relocates them, or local comps suddenly make their home worth more than they realized.

The milestone trigger maps these moments and times your outreach to land right when the seller's internal clock is ticking. You're not "checking in" — you're showing up with relevant intelligence at the exact moment it matters.

THE EARLY-ADOPTER ADVANTAGE

Equity and milestone data is increasingly accessible, but almost no agent systematizes outreach around it. While competitors send the same "thinking of you" card every quarter, you're sending precisely-timed, individually-relevant equity updates. The relationship compounds; the trust compounds; the listings follow.

REAL REVENUE APPLICATIONS

- Trigger an equity-update email when a past client crosses a value milestone
- Time outreach to known life events (anniversary of purchase, kids' ages)
- Alert sellers when neighborhood comps push their home into a new value tier
- Re-engage past clients approaching the typical 5–7 year ownership turnover window
- Segment "ready now" sellers from "nurture" sellers automatically

SYSTEM 2 — PROFIT-GENERATING PROMPTS

Copy these into your AI assistant

BUILD YOUR MILESTONE FRAMEWORK

```
I want to build a seller-outreach system for my real estate past-client database, timed to equity and life milestones. Help me create a milestone framework: list the financial, market, and life-event milestones that signal a homeowner may be ready to sell, and for each one define the data I'd need, where to find it, and the outreach trigger.
```

THE EQUITY-MILESTONE MESSAGE

```
Write a personal email to a past client whose home has crossed a meaningful equity milestone. It should share the insight as helpful intelligence (not a pitch), reference their specific situation, and offer a no-pressure equity/options review. Give me a warm version and a more direct version. My brand voice: [describe].
```

SEGMENT THE DATABASE

```
Help me design rules to automatically segment my past-client and seller database into: (1) ready-to-list-now, (2) nurture/12-month window, (3) long-term. Define the signals that move a contact between segments and what automated touch each segment receives.
```

THE NEIGHBORHOOD-COMP ALERT

```
Write an automated message that fires when recent comps push a homeowner's estimated value into a higher tier. Lead with the specific market insight, make it feel like proprietary intelligence I'm sharing, and CTA to a private valuation conversation. 3 subject line options.
```

YOUR SUCCESS NOTES

Specific ways I can use this for my business:

____

____

Listings currently lost on timing per year: ______ · Recovered listing potential: $______ / yr

First 3 milestones I'll build triggers for:

- [ ]
- [ ]
- [ ]

SYSTEM 3

The AI Clone Re-Engagement Video

THE DEAD-LEAD RESURRECTION MACHINE

WHAT THIS MEANS FOR YOUR BANK ACCOUNT

- Reactivate cold leads automatically — while you sleep
- Stand out with personalized video when competitors send plain text
- Multiply your presence without multiplying your hours

THE TECHNOLOGY BEHIND YOUR AI CLONE

AI video and voice tools can now generate a personalized video — your face, your voice — that drops in a contact's name and property interest dynamically. When a lead who went quiet returns to your website, the system fires a short, personal video: "Hi [Name], saw you were looking at [neighborhood] again — here's what's new." It feels one-to-one. It's fully automated.

This is the advanced module. It has the highest wow-factor and the most setup, which is exactly why we build it last — after your foundation systems are running. Don't start here; earn your way here.

THE EARLY-ADOPTER ADVANTAGE

This is genuinely new, and most agents are intimidated by it. The ones who deploy it now own a differentiation that will take competitors a year or more to copy — and by then you'll have a library of reactivated relationships and closed deals to show for it.

REAL REVENUE APPLICATIONS

- Auto-fire a personal video when a dormant lead revisits your site
- Send personalized video market updates to your top segment monthly
- Create instant video responses to new inquiries (in your voice, 24/7)
- Re-engage leads who ghosted after a showing
- Personalized "happy anniversary of your home purchase" video touches

SYSTEM 3 — PROFIT-GENERATING PROMPTS

Copy these into your AI assistant

SCRIPT THE RE-ENGAGEMENT VIDEO

```
Write a 30-second personalized video script for a real estate AI-clone tool. It fires when a previously-cold lead revisits my website. Use merge fields for [First Name] and [Neighborhood/Interest]. Tone: warm, low-pressure, genuinely helpful. End with one simple CTA. Give me 3 variations for different lead types: buyer, seller, investor.
```

PLAN THE TECH STACK

```
I want to build an AI-clone personalized video system for real estate lead re-engagement, triggered by website revisits. Walk me through the tool stack I'd need (video/voice clone tool, website tracking, automation layer, CRM connection), how they connect, and a realistic setup sequence for a non-technical agent. Flag where I'd want help.
```

DEFINE THE TRIGGER LOGIC

```
Help me define the automation logic for an AI-clone video that fires on website revisit. Specify: what counts as a "revisit worth triggering," frequency caps so it doesn't feel stalker-ish, which lead segments should and shouldn't receive it, and the follow-up sequence after the video sends.
```

MEASURE IT

```
Design a simple tracking framework to measure whether my AI-clone re-engagement videos are working: what metrics to watch (view rate, reply rate, appointments booked), how to attribute revenue, and a 30/60/90-day benchmark for a database of [SIZE].
```

YOUR SUCCESS NOTES

Specific ways I can use this for my business:

Dead leads I write off monthly: ______ · Reactivation revenue potential: $______ / mo

First 3 steps I'll take this week:

- [ ]
- [ ]
- [ ]

⚠️ COMPLIANCE GUARDRAIL

What you must NOT automate

Hyper-personalization is powerful — and it can create real legal exposure if you target the wrong signals. Read this before you build.

FAIR HOUSING IS NON-NEGOTIABLE.

Behavioral targeting that sorts or steers contacts by neighborhood demographics, family status, or any protected class — even indirectly — can trigger a steering complaint. Personalize on **behavior and stated preference**, never on protected characteristics.

Safe to automate on

- ☐ Listings a contact actually viewed/saved
- ☐ Price bands they browse
- ☐ Self-reported preferences and search criteria
- ☐ Equity/value milestones on their own property
- ☐ Time-based events (purchase anniversary, tenure)

Do NOT build triggers on

- ☐ Inferred race, religion, national origin, familial status, disability
- ☐ "Neighborhood fit" logic that proxies for demographics
- ☐ Any segmentation you couldn't comfortably explain to a regulator

My guardrail check: Before launching any trigger, I will confirm it personalizes on behavior or stated preference only. ☐

YOUR 30-DAY IMPLEMENTATION PLAN

From workshop to working systems

Week 1 — Foundation Setup

- [ ] Map every behavioral signal your CRM tracks (Prompt 1, System 1)
- [ ] Build your first behavioral listing trigger
- [ ] Confirm the compliance guardrail on every rule

Week 2 — Seller Intelligence

- [ ] Build your equity-milestone framework
- [ ] Segment your past-client database
- [ ] Launch your first milestone-timed outreach

Week 3 — Optimization & Scaling

- [ ] Review behavioral trigger performance; refine messaging
- [ ] Add 2–3 additional triggers across segments
- [ ] Begin AI clone video setup (script + tool stack)

Week 4 — Advanced + ROI

- [ ] Deploy AI clone video to a test segment
- [ ] Pull engagement and appointment metrics
- [ ] Calculate 30-day ROI and set 90-day targets

YOUR PROFIT COMMITMENT CONTRACT

Put it in writing

Based on today's session, I commit to:

Primary System Focus: I will master ______________________ first because it will recover an estimated $________________ per month in lost opportunity.

Time Investment: I will invest _______ hours per week implementing these systems.

Success Metrics — Dormant contacts reactivated (30 days): ________ New appointments (30 days): ________ Revenue increase target (90 days): $________________

Accountability Partner: ________________________

Weekly Check-in: Every ___________ at ________ 30-Day Review Date: ________________

My Signature: ___________________________ Date: _____________

CLOSING MANIFESTO

Let the system do the remembering.

Your database already knows who's ready to buy, who's ready to sell, and who needs to hear from you today. The only question is whether you'll use what it knows — or keep blasting "Dear [First Name]" to people who stopped reading months ago. Make every client feel like your only client.

Edmund Bogen & Team

Edmund's Mastermind & Group Coaching

Because Sounding Like Everyone Else is NOT an Option!