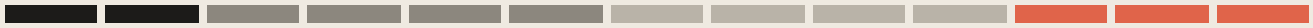
A FIELD PLAN FOR NEW AGENTS

The First 90 Days Plan

Your first 90 days, systemized.



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BEFORE YOU START

Start like you've done this before.

Most new agents spend their first three months waiting. Waiting for a lead, waiting for training, waiting to feel ready. Ninety days goes fast that way.

This plan gives each week a job. Some weeks are setup. Some are getting known. By week 11 you should be ready to write your first offer, or already have.

HOW TO USE IT

- Read the four stages once, all the way through.
- Each Monday, open that week's checklist and block the time on your calendar.
- Use the prompts on page 11 with any AI assistant. Fill in the brackets, paste, then edit what comes back. You review everything before it goes to anyone.
- Behind a week? Don't skip ahead. Finish the week you're on, then keep going.

I'm Shawnii. I've worked Greater Sacramento for close to ten years as a solo agent with Real Broker, on a system I built so the follow-up never depends on my memory. This is the first piece of it.

THE PLAN AT A GLANCE

Thirteen weeks, four stages.

Each one builds what the next one needs.



Weeks 1 to 2 | Weeks 3 to 6 | Weeks 7 to 10 | Weeks 11 to 13

01

WEEKS 1 TO 2

Set up

Your CRM, your sphere list, your calendar and your rules. Nothing goes out yet.

02

WEEKS 3 TO 6

Get known

Tell your sphere, hold your first open houses, and follow up within a day, every time.

03

WEEKS 7 TO 10

First consults

Buyer and seller consults, financing basics, and the questions to ask every time.

04

WEEKS 11 TO 13

First deal

Offer, acceptance, deadlines and closing, run on the workflow on page 12.

One rule runs through all four: block the time first. A task without a calendar slot doesn't happen.

WEEKS 1 TO 2

Set up

01

The goal for these two weeks: everything you need to follow up is in place before you talk to anyone. Nothing goes out yet.

WEEK 1: THE BASICS

- [ ] Look yourself up on the DRE public license lookup and confirm it shows your broker.
- [ ] Join your local association and the MLS, and get your lockbox access working.
- [ ] Set up your email signature: your name, title, phone, brokerage, and your DRE number.
- [ ] Pick one CRM and stay with it. Spreadsheets don't send reminders.
- [ ] Build your stages: New lead, Nurture, Active buyer, Active seller, Under contract, Past client, Sphere.

WEEK 2: YOUR PEOPLE AND YOUR WEEK

- [ ] Build your sphere list: phone contacts, social, past jobs, school, gym, church, your kids' activities. Aim for 150 names. Every one goes in the CRM tagged Sphere.
- [ ] Mark the 50 who would answer a call from you today. They hear from you first.
- [ ] Block your week: one hour of conversations every weekday morning, one open house on the weekend, and 30 minutes on Friday to review the week and plan the next.
- [ ] Write down your rules (page 13) and tape them where you work.

You're ready for week 3 when: your sphere is in the CRM, your calendar has the blocks, and you can find any contact in under ten seconds.

WEEKS 3 TO 6

Get known

02

The goal: every person in your sphere knows you're licensed, and you've held at least two open houses with a follow-up for every visitor.

WEEK 3: TELL YOUR TOP 50

- [ ] Call your top 50 first. A text is fine for the ones who never pick up.
- [ ] Log every conversation in the CRM the same day, with one note you can bring up next time.
- [ ] Ask one question at the end of every call (page 6). Don't pitch.

WEEK 5: THE REST OF YOUR SPHERE

- [ ] Reach the other 100 by text, email or a short note. Same message, same question.
- [ ] Second open house, same routine.

WEEK 4: YOUR FIRST OPEN HOUSE

- [ ] Ask the listing agents in your office if you can hold one of their listings this weekend.
- [ ] Prep: the listing details, three recent sales nearby, and the price range of what's active around it.
- [ ] Use a sign-in sheet or a QR code. Every visitor goes in the CRM that night.
- [ ] Follow up with every visitor within 24 hours.

WEEK 6: REVIEW

- [ ] Count it: conversations, open house visitors, and anyone who said they might buy or sell.
- [ ] Every one of them has a next touch date in the CRM.

WHAT TO SAY

Three messages, no pitch.

THE SPHERE CALL

> *"Hi [name], it's [your name]. I wanted you to hear it from me: I got my real estate license and I'm with [brokerage]. I'm not calling to sell you anything. I'm building my business on people I already know, so I have one question. When you think about buying or selling, is that this year, in a few years, or not on your radar?"*

Whatever they say, thank them, and ask if it's OK to send them something useful now and then.

THE SPHERE TEXT

> *"Hi [name], it's [your name]. Quick news: I'm now licensed in real estate with [brokerage]. No pitch. If you or anyone you know starts thinking about a move, I'd love to be the first call. How have you been?"*

THE OPEN HOUSE FOLLOW-UP (WITHIN 24 HOURS)

> *"Hi [name], it's [your name] from the open house at [address] yesterday. You mentioned [the one thing they said]. I put together a few homes nearby that match. Want me to send them over?"*

Keep it fair. Describe the home and the area, never the people who live there. If someone asks about schools or who lives nearby, point them to the school district's website and the public data, and let them decide. Words like "safe" or "family-friendly" stay out of your marketing.

WEEKS 7 TO 10

First consults

03

The goal: you can run a buyer consult and a seller consult from memory, and the follow-up is ready before you walk in.

Week 7	Practice both consults out loud, twice each, with a friend or your broker.
Week 8	Book at least one real consult from your sphere or open house list.
Week 9	Hold the consult. Send a recap email the same day: what they want, what happens next, and the date of your next touch.
Week 10	Keep booking. One consult a week from here on is the habit.

THE BUYER CONSULT (45 MINUTES)

1. Their why and their timing. Why now, and what happens if they wait.
2. The home: must-haves, nice-to-haves, deal-breakers, areas.
3. Money: are they pre-approved, and with whom? If not, the next step is a lender conversation this week.
4. How you work: how you'll search, how fast you'll respond, how offers work in this market.
5. The buyer representation agreement. In California you need a signed written agreement before you tour homes together. Walk through it line by line, including that your compensation is negotiable.
6. Next step on the calendar before they leave.

THE SELLER CONSULT (60 MINUTES)

1. Their why, their timing, and where they're going next.
2. Walk the home with them. Note what to fix, what to leave, and what to stage.
3. Pricing: what similar homes sold for in the last six months, what's active now, and what that means for their price range. Bring the comps printed.
4. The plan: prep, photos, launch week, showings, offers.
5. The listing agreement, including that commissions are fully negotiable and not set by law.
6. Next step on the calendar before you leave.

FINANCING BASICS

Know enough to ask. Then call a lender.

You don't need to be a lender. You need to know enough to ask the right questions and send people to one early.

Prequalified vs. pre-approved

A prequal is a conversation. A pre-approval means a lender has reviewed income, assets and credit. Offers go in with a pre-approval.

The common loan types

Conventional, FHA, VA (for eligible veterans and service members) and jumbo, for loans above the conforming limit. Each has its own down payment and property rules.

What a buyer needs in cash

The earnest money deposit with the offer, the down payment, and closing costs. Ask the lender for an estimate of all three before the first showing.

Your line

Never quote a rate or tell someone what they qualify for.

> *"That's a great question for the lender. Let's get you on the phone with one this week."*

QUESTIONS TO ASK EVERY TIME

- What would make this a great result for you a year from now?
- Who else is part of this decision?
- What's happened with any past moves, good or bad?
- How do you like to hear from me, and how often?

WEEKS 11 TO 13

First deal

04

The goal: when your first offer gets accepted, you already know every step to closing and nothing depends on your memory.

WEEK 11: WRITE A PRACTICE OFFER

- [ ] Write a full offer on a real active listing with your broker, start to finish. Don't send it.
- [ ] Have your broker mark it up. Fix it.

WEEK 12: BUILD YOUR DEAL CHECKLIST

- [ ] One checklist you copy for every deal: the deadlines on page 10, who to email, and what goes into your brokerage's compliance system.
- [ ] Save your escrow emails as templates: the opening email, the deposit confirmation, the contingency removal.

WEEK 13: RUN IT

- [ ] When an offer is accepted, run the workflow on page 12 the same day.
- [ ] Every Friday until closing, send your client a short update: where things stand, what's next, and what you need from them.

Your first deal is not the time to learn the steps. Learn them in week 11.

FROM ACCEPTANCE TO CLOSING

Every deadline, counted from day zero.

The California purchase agreement sets default deadlines, counted from acceptance. Your contract can change any of them, so always work from the dates in your own agreement. Day 1 is the first full day after acceptance, and a deadline that lands on a weekend or legal holiday moves to the next business day.

WHEN	WHAT HAPPENS	YOUR JOB
Day 0	Offer accepted	Open escrow, send the opening email, put every deadline on your calendar
By day 3 (business days)	Earnest money deposit due	Confirm escrow received it, in writing
Days 1 to 7	Seller disclosures delivered	Get them to your buyer and set a time to go through them together
Days 1 to 17	Inspections, appraisal and loan work	Book inspections in the first week, keep the lender and escrow moving
Day 17 (default)	Investigation, appraisal and loan contingency periods end. Each stays in place until the buyer removes it in writing	Remove contingencies in writing, or ask for repairs or credits before this date
5 days before closing (default)	Final walk-through	Walk the home with your buyer and confirm agreed repairs are done
Closing day	Funds and recording	Confirm recording, hand over keys, and set the thank-you plan

TWO RULES THAT SAVE DEALS

- Any change after acceptance goes in writing on an amendment signed by both sides. Never a handshake, never a text.
- Send each client's contact details to escrow separately, never on a group email with the other side.

Paste, fill in, edit.

These come from the system I run my own business on. Paste one into any AI assistant, fill in the brackets, and edit what comes back. Nothing goes to a client until you've read it.

YOUR DAY

- What's on my plate today, in order? Deadlines first. Here's my calendar and my task list: [paste].
- Here are my notes from today's calls: [paste]. Turn them into one CRM note per person and a next step with a date for each.

YOUR SPHERE AND OPEN HOUSES

- Write a text to [name], who I know from [where], telling them I'm now licensed with [brokerage]. Warm, short, no pitch, ends with a question about them.
- I'm holding an open house at [address] on [date]. Write the follow-up text for a visitor who said [what they said]. Under 40 words.

YOUR BUYERS AND SELLERS

- New buyer: [name], looking in [area] around [price], timing [when], pre-approved: [yes/no]. Draft my first follow-up email. Draft only.
- Here are my notes from a buyer consult: [paste]. Write the recap email: what they want, what happens next, and our next date.
- I'm meeting a seller at [address] on [date]. Give me ten questions to ask, in order, and what each one tells me.

YOUR CONTRACTS

- Accepted contract on [address], acceptance [date]. Here are the contract terms: [paste]. List every deadline with its date, and tell me the next step.
- Draft the Friday update for [clients] on [address]. Where it stands: [notes]. Next deadline: [date]. Draft only.
- Review this repair request against the inspection report and tell me what's reasonable to ask for and why: [paste both].

THE WORKFLOW

Accepted contract to closing.

This is the workflow my own system runs every morning on every deal. Here it is by hand, so it works with any tools.

1. **The day it's accepted,** tell your assistant the contract is accepted and paste the terms. Ask for every deadline with its date.
2. **Write down where the deal stands** in one note: price, parties, escrow, lender, every deadline, and what's done.
3. **Every deadline becomes two reminders** on your calendar: two days before, and the day itself.
4. **Each morning, draft only the next step.** One email, one call, one form. You review it and send it yourself.
5. **Every Friday,** send your client the update: where it stands, what's next, what you need from them.
6. **After closing,** set the thank-you, the review ask, and the first check-in on your calendar before you close the file.

The system remembers the dates. You spend your attention on the people.

THE HOUSE RULES

The short list that keeps you out of trouble.

Whatever tools you use.

Tools draft, you send.	No email, text or post reaches anyone without your click.
Nothing on autopilot to someone you don't know.	A cold phone number gets a Do Not Call check before you call or text it.
Your compliance system is the record.	Every document goes in, complete, on time.
Changes after acceptance go in writing,	on an amendment both sides sign.
Client details go to escrow separately,	never on a group email.
You log in yourself.	No passwords in documents, notes or prompts.
Archive, don't delete.	Old files move to an archive folder. You may need them later.
End every week with a review.	Fifteen minutes on Friday: what got done, what's next, who needs a call.

WHEN YOU WANT MORE

Ninety days in.

You have a sphere that knows you, a consult you can run, and a deal workflow you trust. Here's what comes next, whenever you're ready.

LEVEL 2

The kit

The whole system behind my business, ready to install: the Operating Manual template, bot setup, CRM follow-up blueprints, the full prompt library and a setup guide. Free when you join Real Broker with me as your sponsor.

LEVEL 3

Mentorship at Real

Join Real with me as your sponsor, or join me at Real for mentorship and staged access to my guides, workflows and AI system.

Book a 15-minute call
calendly.com/shawnii-showcaseagent/15-minute-intro-call

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