

90-Day Seller Appointment Roadmap

90-Day Seller Appointment Implementation Kit

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Purpose: Build, launch, and operate the seller appointment system in the correct order.

Requires: Start Here

When to use: Before building and at each weekly review

Estimated time: 30 minutes to plan; approximately 14–22 hours of setup

[Open the Resource Hub](#)

The outcome and the clock

Pursue 18–20 held listing appointments in 90 days. The target counts the first substantive attended listing conversation with each qualified seller/property opportunity. Booked appointments are a separate stage. This is a Lead Coasters target, not a guarantee or industry benchmark.

Set up the system before the clock starts. Campaign Day 1 is the first day paid ads deliver. If setup needs another day, move the launch date instead of paying for an incomplete funnel. Appointment and closing outcomes can lag acquisition; signed listings and cash received are tracked separately.

Start with one campaign owner

Write the owner, service area, business hours, launch date, total risk budget, and daily lead-response owner into Software Functions and System Setup. You can use your existing website and CRM if they pass the function checks. Read Seller Campaign Compliance Checklist initial guardrails and complete Software Functions and System Setup function and field plan before building. Draft templates first, connect their workflows through CRM Automation and Connection SOP, then test them together; references to CRM Automation and Connection SOP during setup mean use its design rules now and complete its integration tests before launch. Complete the final Seller Campaign Compliance Checklist review once drafts exist and obtain your brokerage's required review before publishing homeowner-facing content.

Step 1 Plan

Open Seller Campaign Economics Calculator. Enter your own listing economics, negotiated listing-side fee, agent retention, fulfillment costs, advertising budget, and tolerable cost per held appointment and signed listing. Default values are planning assumptions. Do not plan from screenshots of someone else's results.

The worked planning example uses \$4,500 across 90 days, \$15 CPL, 40% qualification, 20% qualified-to-book, and 75% first-appointment attendance. It yields 300 raw leads, 120 qualified seller opportunities, 24 unique bookings, and 18 held appointments. Changing any rate changes the required volume and budget. Record a downside version by changing the same model inputs and saving your notes; there is no promised outcome.

You're done when: all assumptions have a basis, you have a written maximum risk budget, and the held-appointment target is financially plausible under your assumptions. If the model is unaffordable, reduce the planned scale or improve an evidenced conversion constraint; do not simply assume a cheaper CPL.

Step 2 Create Your Seller Offer

Use Seller Offer Selection Worksheet to choose one seller problem and score offers. Use Seller Resource Templates to produce the actual resource. Start with a useful seller checklist if you lack permission to

publish local sales data. Use a pricing report only when you can deliver property-specific analysis reliably. Write the title, benefit, delivery promise, and CTA before the ad.

Replace local placeholders and cite any market figures with period, geography, sample, and permission. Do not imply an appraisal or guaranteed sale price. Offer delivery must not depend on booking a consultation.

You're done when: a homeowner can open the finished resource, use it, and understand its limits without a sales call. Resources: Seller Offer Selection Worksheet and Seller Resource Templates.

Step 3 Build Your Ads

Use Seller Ad Copy and Headline Templates to select two copy angles for the same offer. Use Seller Creative Guide to create two simple visuals. Record stable ad IDs and the variable you want to compare in Seller Ad Testing Tracker. Draft one Meta Leads campaign and one Housing-compatible ad set, but leave it off.

Keep initial testing small enough for your risk budget. Meta may distribute spending unevenly; two ads in one ad set are directional comparisons, not a randomized controlled test. Avoid adding multiple service areas, offers, and audiences at once.

You're done when: the copy matches the resource and landing-page promise, images are licensed, and every asset has brokerage review where required. Resources: Seller Ad Copy and Headline Templates and Seller Creative Guide and Seller Campaign Compliance Checklist.

Step 4 Build Your Funnel

Draft Seller Qualification Form form fields and qualification rules first, then build the short Landing Page Copy Template page using Landing Page Wireframe. Display the agent and brokerage accurately. Keep the requested resource clear and the form short. Build the thank-you page with an immediate download and an optional booking path.

Do not ask a general checklist buyer for a full address merely to receive a checklist. Property-specific report requests do need an address. Test on a real phone, submit the form, and open the download from the email. Resources: Landing Page Copy Template and Landing Page Wireframe and Seller Qualification Form.

You're done when: headline, offer, mobile layout, submit action, CRM record, download, email, privacy link, and optional booking link work.

Qualification within Step 4

Use Seller Qualification Form. Collect name and email before a generic resource. Ask timeline, ownership or authorization, and property area after conversion. Before booking, confirm the seller/property meets the documented qualification criteria. Unknown details are pending, not automatically qualified.

Route ready qualified sellers to booking; route 3–6 month sellers to relevant nurture; keep longer-term or unknown intent in light nurture only when allowed; send out-of-area or already represented inquiries to the brokerage-approved process. Do not use protected traits in qualification.

You're done when: test contacts reach the correct path, unqualified bookings are reviewed by a human, and the qualified timestamp is recorded. Resources: Seller Qualification Form and CRM Automation and Connection SOP.

Step 5 Follow Up Book and Confirm

Use Booking Page Template. Sync the correct calendar, define your location and seller-local timezone, and publish realistic appointment availability. Test overlapping appointments and a daylight-saving transition in the calendar. Reserve time to prepare and to record the outcome.

You're done when: a qualified seller can book, receive the correct time and location, and reschedule without creating a second unique booked opportunity. Resources: Booking Page Template and CRM Automation and Connection SOP.

Follow-up within Step 5

Use the actual Seller Follow-Up and Nurture Pack messages. Connect form submission to resource delivery, CRM creation, owner alert, and the appropriate nurture branch. A reply creates a human task and pauses automated promotional messages. A booking switches the contact to confirmations. An opt-out suppresses the affected marketing channel immediately under the kit's operating rule.

SMS is optional. Keep it disabled until consent wording, sender registration, quiet hours, opt-out handling, and state rules are verified through Seller Campaign Compliance Checklist. Retargeting is also optional and must use currently permitted Housing audiences and appropriate data permissions. The core system works with email and human replies.

You're done when: delivery, replies, booking exits, suppression, and failed-send alerts pass CRM Automation and Connection SOP. Resources: Seller Follow-Up and Nurture Pack, Seller Campaign Compliance Checklist and Software Functions and System Setup and CRM Automation and Connection SOP.

Confirmation within Step 5

Use Appointment Confirmation and Reminder Pack. Send an immediate confirmation, a reminder about 24 hours before, and one about two hours before. Skip a reminder whose time has already passed for a last-minute booking. Do not stack multiple reminders at once.

After the appointment, mark Held, No-show, Cancelled, or Rescheduled in the appointment log and update the first-held date only if the listing conversation occurred. Contact no-shows respectfully and stop if they decline. Resources: Appointment Confirmation and Reminder Pack and 90-Day Seller Campaign Tracker.

You're done when: a booking, reschedule, cancellation, last-minute booking, and no-show each follow the correct path.

Step 6 Connect Test and Launch

Complete Software Functions and System Setup's event map and CRM Automation and Connection SOP's connection tests, then Meta Campaign Setup Checklist's Meta-specific setup. Inspect the current official Housing audience rules in your own Ads Manager; record the check date and actual controls. Select the lead outcome for the website conversion path rather than optimizing for cheap clicks. Use the available account-specific configuration that matches that function.

Use Campaign Launch Checklist as the final launch gate. Launch at the approved budget only after a real test has reached the CRM, the resource, the calendar, and the tracker. Pause immediately for missing routing, broken forms, consent problems, duplicate lead events, or policy rejection. Resources: Meta Campaign Setup Checklist, Campaign Launch Checklist and 90-Day Seller Campaign Tracker, Seller Campaign Compliance Checklist and Software Functions and System Setup and CRM Automation and Connection SOP.

You're done when: every Campaign Launch Checklist item passes, the launch date is recorded, and the first production inquiry is handled correctly.

Step 7 Track Improve and Scale

Use the Campaign Tracker daily and the Weekly Review Worksheet every week. Open the decision tree, troubleshooting and scaling resources only as the current constraint requires.

Days 1–7 Verify delivery and handling

Daily: check spend against the risk budget, ad delivery, page availability, failed automations, incoming messages, and upcoming appointments. Enter completed daily ad data in 90-Day Seller Campaign Tracker. Record actual zeroes only when the export confirms zero; leave unreported dates blank.

Fix operational defects immediately. Do not replace the offer because a few leads did not reply. At the end of the first week use Weekly Campaign Review Worksheet to distinguish data gaps from performance gaps. A practical starting review cadence is weekly; this is an operating choice, not a proven performance benchmark.

Days 8–30 Measure and repair the weakest stage

Review on Days 7, 14, 21, and 30. Use a cohort old enough to have had the planned follow-up and appointment opportunity. Compare counts as well as rates. Campaign Optimization Decision Tree identifies the earliest important leak; Seller Campaign Troubleshooting Guide shows how to verify the cause.

Write one hypothesis, one variable, a baseline, a practical effect threshold, a sample and spend cap, and a review date into Seller Ad Testing Tracker before changing anything. If data are sparse, improve tracking and wait within the budget cap; do not call one additional booking proof. Stop early for an operational failure, policy issue, or exceeded risk cap.

Days 31–60 Improve the working system

Review weekly and formally on Days 45 and 60. Recalculate the economics using mature campaign data. Improve the main constraint: message relevance, page completion, qualification clarity, human response, availability, reminders, or the listing conversation. Keep offer, geography, budget, and follow-up stable while testing one selected variable unless a broken prerequisite forces a repair.

Use MORE for a funnel already working within your cost limits and service capacity. Use BETTER to repair a weak stage. Use NEW when a specific hypothesis calls for a new offer, creative, or channel and you can measure it separately.

Days 61–90 Scale cautiously or consolidate

Use Scaling Checklist before increasing spend. Make one affordable budget increase, keep the other variables fixed, and review after the preselected window and sample. If your CPA or service capacity breaks the written limit, revert the increase and investigate. There is no universal safe percentage or doubling schedule in this kit.

Review on Days 75 and 90. Count first held qualified seller opportunities occurring within Days 1–90 against 18–20. Preserve Day 90 totals and separately continue following the acquired cohort to eventual listings, closings, and actual commission. Do not rewrite the target as booked appointments if attendance falls short.

Your weekly operating block

- Daily 15–25 minutes as an initial scheduling assumption: inspect delivery, handle replies, verify lead tasks and appointments, and update records. Increase this allocation as actual workload requires.
- Weekly 45–60 minutes: reconcile counts, use Weekly Campaign Review Worksheet, choose the constraint through Campaign Optimization Decision Tree, and record one test in Seller Ad Testing Tracker.
- Every 30 days: refresh local seller content, check permissions and policies, update Seller Campaign Economics Calculator assumptions, and assess capacity through Scaling Checklist.
- Before each appointment: review seller answers and the property. After each appointment: record outcome, next step, qualification changes, and a follow-up date.

When not to change the campaign

Do not change several inputs because a single week looks weak. Do not compare a two-day new ad to a mature 30-day cohort. Do not increase budget while routing is failing. Do not continue a test beyond the agreed spend cap merely to wait for significance. Do not withhold the promised resource to force booking.

You are done when

Your setup passes Campaign Launch Checklist, a campaign owner and review schedule are assigned, and the full 90-day operating plan is in your calendar.