

Campaign Launch Checklist

90-Day Seller Appointment Implementation Kit

Version 1.1 | Last Updated October 2, 2026

Purpose: Verify the full system before the first advertising dollar is spent.

Requires: Seller Campaign Economics Calculator: approved budget; Steps 2–5 complete: offer, ads, funnel, qualification, follow-up, booking and confirmations; 90-Day Seller Campaign Tracker: setup complete; Seller Campaign Compliance Checklist: reviewed; Software Functions and System Setup and CRM Automation and Connection SOP: end-to-end tests passed; Meta Campaign Setup Checklist: campaign drafted and checked

When to use: Immediately before activation

Estimated time: 45–60 minutes

[Open the Resource Hub](#)

Customize before using

Replace the fields used in your selected template. Use [AGENT NAME], [BROKERAGE], [CITY], [COUNTY] or [NEIGHBORHOOD], [SELLER OFFER], verified [LOCAL MARKET DATA], [BOOKING LINK], [PHONE] and [EMAIL] consistently. Complete any additional bracketed delivery, privacy, property or review fields that apply. Delete instructions and unused alternatives before sending.

Campaign record

Owner [NAME] Backup [NAME] Launch date [DATE] Agent timezone [ZONE]
Campaign [ID] Ad set [ID] Ad IDs [IDS] 90-day risk budget [USD]
Budget-owning level [LEVEL] Daily monitoring limit [USD] Service windows [HOURS]

Offer and content

- ☐ Resource is finished, accurate, and accessible without booking.
- ☐ No unfilled homeowner-facing placeholder, fabricated proof, unsupported guarantee, or unlicensed image remains.
- ☐ Ad, page, email, and resource name the same offer and honest delivery time.
- ☐ Agent, brokerage, and required local disclosures are correct.

Funnel and routing

- ☐ Ad destination and tracking parameters work on mobile.
- ☐ Invalid submit is rejected; valid submit creates one opportunity and the promised resource delivery.
- ☐ Download and privacy links work; thank-you page does not gate the resource behind booking.
- ☐ Qualification test cases route correctly and unknown details stay pending.
- ☐ Ready qualified seller reaches the right calendar; out-of-area and represented seller paths reach human review.
- ☐ Owner and backup receive lead alerts; a failed integration is visible and has a manual fallback.

Follow-up and appointments

- ☐ Delivery, reply pause, booking exit, and opt-out suppression pass CRM Automation and Connection SOP.
- ☐ The sender can receive replies; commercial email footer and unsubscribe work.

- ☐ Calendar conflict, timezone, location, reschedule, and cancellation tests pass.
- ☐ Immediate, 24-hour, and same-day reminders use the current appointment state.
- ☐ Last-minute booking skips elapsed reminder times; old jobs stop after reschedule/cancel.
- ☐ SMS is verified through Seller Campaign Compliance Checklist or disabled; retargeting is verified or disabled.

Tracking and Meta

- ☐ Current official Housing settings were checked in the signed-in account; date and controls are recorded in Meta Campaign Setup Checklist.
- ☐ Correct lead outcome, event, dataset, destination, and budget are selected.
- ☐ Every enabled placement has been previewed; required disclosures are readable.
- ☐ One successful test equals one logical lead event and one CRM opportunity; refresh does not duplicate it.
- ☐ 90-Day Seller Campaign Tracker start date, as-of date, lead IDs, and appointment outcome definitions are understood.
- ☐ Test records are excluded from campaign reporting with their reasons retained.

Activate and watch

- ☐ Brokerage or compliance approvals required for your situation are complete.
- ☐ Activate at the approved budget and inspect the first production inquiry end to end.
- ☐ Put daily monitoring, weekly Weekly Campaign Review Worksheet review, and Days 30/60/90 reviews in the calendar.

If any core item fails, keep delivery off and repair it. Stop immediately for consent, policy, broken-form, routing, or tracking defects. Do not run ads while hoping those issues will resolve themselves.

You are done when

Every applicable item below is verified with evidence; optional SMS/retargeting are either tested or disabled.