

Scaling Checklist

90-Day Seller Appointment Implementation Kit

Version 1.1 | Last Updated October 2, 2026

Purpose: Increase working volume without multiplying a broken or unaffordable funnel.

Requires: Seller Campaign Economics Calculator Updated economics; 90-Day Seller Campaign Tracker Mature actual outcomes; Weekly Campaign Review Worksheet Review; Seller Ad Testing Tracker Completed tests; Seller Campaign Compliance Checklist Current policy check

When to use: Before every budget increase, chiefly Days 31–90

Estimated time: 30–45 minutes

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Before increasing budget

- ☐ Form, CRM, consent handling, resource delivery, calendar, and reminders work reliably.
- ☐ Mature cohort costs and quality are within your written limits; a cheap raw lead alone is insufficient.
- ☐ First held qualified seller opportunities are measured separately from bookings and attempts.
- ☐ Attributed signed listings, closings, and commission are not confused with each other.
- ☐ The agent and backup can handle the increased replies, reports, consultations, and next steps.
- ☐ The current geographic and Housing controls still match a region you can serve.
- ☐ The next spend increment fits the approved downside budget even if it produces no immediate listing.
- ☐ No important active experiment will be confounded by the increase.

Choose MORE BETTER or NEW

MORE: Raise volume of the measured working system within financial and service limits.

BETTER: Repair or test the weakest important conversion stage before buying more traffic.

NEW: Create a separate, measured offer, creative, or channel only when a clear hypothesis justifies it. Keep attribution and comparisons clear.

Do not choose NEW because a new tool or ad idea is interesting.

Write the scaling decision

Current budget [USD / PERIOD] New budget [USD / PERIOD]

Reason [MATURE COHORT EVIDENCE] Capacity available [HOURS / APPOINTMENTS]

Primary outcome [COST PER HELD / COST PER LISTING / OTHER DEFINED OUTCOME]

Success threshold [VALUE] Quality floor [VALUE AND BASIS]

Observation window and maturity [DATES] Spend cap [USD]

Kept fixed [OFFER / ADS / AREA / PAGE / NURTURE]

Rollback rule [COST / ROUTING / CAPACITY / COMPLIANCE TRIGGER]

Owner [NAME] Review [DATE]

Practical increase example

Planning illustration: Choose an increment that fits your remaining risk budget and available appointments.

Write the dollar change; do not use a universal percentage rule. Keep the working funnel stable while the added cohort matures. If delivery or service breaks, reduce or pause spend immediately. If the economic threshold fails after the planned window, revert and use Campaign Optimization Decision Tree to investigate.

End of 90 days

Preserve the Day 90 first-held target count. Continue tracking the cohort's eventual wins and closings separately. Refresh resource data, dates, permissions, and policy checks before a new campaign cycle. Never copy a hypothetical result or another agent's screenshot into your own case study.

You are done when

An affordable increase has an owner, a capacity check, a success threshold, a spend cap, and a rollback rule.