

BONUS PLANNER

The 30-Day AI Rollout Planner

A week-by-week workbook for building your lead-response agent, follow-up sequence, and listing workflow

A companion workbook to Chapter 12 of *AI Agents for Real Estate Agents*

How to Use This Planner

This planner mirrors the 30-day rollout plan from the book, one week at a time. Each week gets its own checklist page — check items off as you complete them, and use the notes space for anything worth remembering, like a setting you changed or a question to revisit.

You don't need to rush. If a week takes you a little longer than seven days, that's fine — the order matters more than the exact pace. Work through it once, then keep this planner as a reference the next time you add a new tool or revisit a workflow.

Before you start: block dedicated time on your calendar for each week before Week 1 begins. Protected time is what actually gets a rollout like this finished — without it, this plan will keep losing out to whatever feels urgent that day.

MY TOP PRIORITY FROM CHAPTER 2

MY 30-DAY START DATE

WEEK 1

Pick Your Tools & Build the Lead-Response Agent

- ☐ Chose one email/SMS automation platform to start with, after searching current options for real estate.
- ☐ Connected the tool to my primary lead source (website form, business text line, or portal inquiries).
- ☐ Drafted my instant-reply message template, including 1-2 qualifying questions.
- ☐ Built my handoff rule: defined exactly what counts as a “hot” lead.
- ☐ Tested the full sequence myself, at least twice, from trigger to handoff.
- ☐ Went live on one lead source only — didn't connect every channel at once.

Date started: _____**Date completed:** _____**THIS WEEK'S NOTES**

WEEK 2

Build the Follow-Up Sequence

- ☐ Sketched my 30/60/90-day touchpoint plan and what value content fits each stage.
- ☐ Set up my four core merge fields (name, area of interest, property type, last interaction).
- ☐ Built the wait periods and reply-branching logic so a lead's response pauses the sequence.
- ☐ Set up handoff trigger words/phrases and confirmed notifications are immediate, not batched.
- ☐ Decided and documented my rule for leads who reach Day 90 with no response.
- ☐ Tested the sequence on a small batch of existing leads before relying on it fully.

Date started: _____

Date completed: _____

THIS WEEK'S NOTES

WEEK 3

Set Up the Listing & Content Workflow

- ☐ Chose my AI writing tool (standalone or built into my CRM/listing platform).
- ☐ Built and saved my listing description prompt templates for my typical property types.
- ☐ Built and saved my format-specific templates: social caption, email blurb, flyer text.
- ☐ Ran a real, active listing through the full workflow, including the “before you publish” checklist.
- ☐ Confirmed my process for verifying image rights and labeling any virtually staged photos.
- ☐ Saved my best-performing prompts as reusable templates — with a reminder to re-verify facts each time.

Date started: _____

Date completed: _____

THIS WEEK'S NOTES

WEEK 4

Test, Refine & Measure

- ☐ Reviewed every automated message sent so far — read them as if I were the recipient.
- ☐ Checked my handoff triggers for anything that slipped through, and adjusted the trigger list.
- ☐ Looked at early response and engagement patterns without over-interpreting small samples.
- ☐ Revisited merge field accuracy across my active leads.
- ☐ Decided whether I'm ready to connect additional lead sources now that the system is tested.
- ☐ Wrote down one or two specific adjustments to make in the next 30 days.

Date started: _____**Date completed:** _____**THIS WEEK'S NOTES**

30-Day Reflection

A few minutes here goes a long way — this is what turns a one-time setup into a system you actually trust.

What's working well so far?

What needs adjusting?

One specific thing I'll change in the next 30 days

Date I'll revisit this plan

QUICK ACTION

- ☐ Schedule your Week 4 reflection on your calendar right now, 30 days from your start date.
- ☐ Move any unchecked items into next week rather than letting them quietly disappear.
- ☐ Re-read Chapter 13 before your next review to refresh your KPI tracking habit.