



YLOPO + FOLLOW UP BOSS  
**PROSPECTING  
POWER UP**

**90-DAY CHALLENGE**

*Build Better Habits.  
Create More Conversations.  
Close More Transactions.*

WORKBOOK BY  
**Shana Gates**

CSO & PRINCIPAL PARTNER  
CRAFT & BAUER | REAL BROKER

*One focused hour a day  
can change your entire business.*

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# YOUR BUSINESS. YOUR NUMBERS. YOUR 90 DAYS.

Before you can build the right daily habits, you need to know exactly what you're working toward.

 Follow Up Boss

 ylopo

## MY BUSINESS GOALS

| GOAL                   | MY CURRENT REALITY | MY GOAL |
|------------------------|--------------------|---------|
| Annual Income          | \$                 | \$      |
| Transactions           |                    |         |
| Database Size          |                    |         |
| Grow My Database To    |                    |         |
| Referral Transactions  |                    |         |
| Revenue Share Partners |                    |         |

## MY ACTIVITY GOALS

| ACTIVITY                          | MY GOAL |
|-----------------------------------|---------|
| Open Houses Per Month             |         |
| Calls Per Week                    |         |
| Contacts Made Per Week            |         |
| Appointments Set Per Month        |         |
| Loan Applications Taken Per Month |         |
| Buyer Opportunities               |         |
| Seller Opportunities              |         |
| Buy / Sell Opportunities          |         |
| Referrals                         |         |
| Rev Share Partners                |         |

## MY WHY

What would achieving these goals change for me personally, professionally, or financially?

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## MY 90-DAY COMMITMENT

For the next 90 days, I commit to completing one focused Power Hour, five days per week.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

*Discipline today. Freedom tomorrow.*

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# YOUR DAILY POWER HOUR

## 60 MINUTES. 5 DAYS A WEEK. 90 DAYS.

Success in real estate isn't built from occasional bursts of activity.  
It's built through consistent, focused habits.



5  
MINUTES

### STEP 1 — REVIEW | 5 MINUTES

Open Follow Up Boss and:

- ☐ Review Today's Tasks
- ☐ Check Inbox Messages
- ☐ Respond to new conversations first
- ☐ Prioritize overdue follow-ups



Follow Up Boss



40  
MINUTES

### STEP 2 — CONNECT | 40 MINUTES

Work through your task list. Before moving on from each contact, identify:

- |                                                              |                                                                       |
|--------------------------------------------------------------|-----------------------------------------------------------------------|
| <input type="checkbox"/> Are they actively buying?           | <input type="checkbox"/> Do they own a home?                          |
| <input type="checkbox"/> Are they also selling a home?       | <input type="checkbox"/> Would a complimentary home value be helpful? |
| <input type="checkbox"/> Do they already have an agent?      | <input type="checkbox"/> What is their ideal timeline?                |
| <input type="checkbox"/> Cash or financing?                  | <input type="checkbox"/> What is their motivation?                    |
| <input type="checkbox"/> Are they pre-approved?              | <input type="checkbox"/> What is their biggest obstacle?              |
| <input type="checkbox"/> Do they need a lender introduction? |                                                                       |



10  
MINUTES

### STEP 3 — SCHEDULE | 10 MINUTES

Never end a conversation without a clear next action.

- |                                                                                                              |                                                                                                               |                                                                                                                 |                                                                                                               |                                                                                                             |                                                                                                            |
|--------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| <br>Buyer<br>Consultation | <br>Listing<br>Appointment | <br>Lender<br>Introduction | <br>Home Value<br>Report | <br>Property<br>Search | <br>Follow-Up<br>Call |
|--------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|



5  
MINUTES

### STEP 4 — UPDATE | 5 MINUTES

- |                                                                |                                                      |
|----------------------------------------------------------------|------------------------------------------------------|
| <input type="checkbox"/> Complete the task                     | <input type="checkbox"/> Update tags                 |
| <input type="checkbox"/> Move the contact to the correct stage | <input type="checkbox"/> Schedule the next follow-up |
| <input type="checkbox"/> Add detailed notes                    | <input type="checkbox"/> Add any new contacts        |



### THE GOLDEN RULE:

*Every conversation ends with a clear next step,  
a scheduled follow-up, and an updated CRM.*

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# THE PERFECT PROSPECTING CONVERSATION

DON'T JUST MAKE CALLS. CREATE OPPORTUNITIES.



## OPEN THE CONVERSATION

Contact Name: \_\_\_\_\_

Source: \_\_\_\_\_

### Opening Question:

*"I wanted to check in and see where you are in your real estate plans. Are you still considering buying or selling?"*



## DISCOVER THE OPPORTUNITY

- ☐ Buyer
 ☐ Seller
 ☐ Buying & Selling  
☐ Referral Opportunity
 ☐ Lender Opportunity

What are they looking for in their next home?

\_\_\_\_\_

What's their timeframe?

- ☐ 0-90 Days
 ☐ 3-6 Months
 ☐ 6-12 Months
 ☐ 1+ Year

Do they currently own or rent?

- ☐ Own
 ☐ Rent

If they own, do they need to sell before purchasing?

- ☐ Yes
 ☐ No
 ☐ Unsure

Financing:

- ☐ Cash
 ☐ Pre-approved  
☐ Needs lender connection
 ☐ Unsure



## TWO QUESTIONS THAT CREATE OPPORTUNITY

- 1 *"Would a complimentary home valuation on your current home be helpful to you?"*
- 2 *"Will you be paying cash for your next home, or can I connect you with a lender to review financing options?"*

These questions are directly aligned with the call objectives in your tracking system and help uncover real opportunities.



## BEFORE YOU HANG UP...

The agreed next action is: \_\_\_\_\_

Follow-up date: \_\_\_\_\_

- ☐ Next task created in Follow Up Boss



### REMEMBER:

*The goal isn't just to have a great conversation.  
The goal is to create clarity, build trust, and schedule the next step.*

*Discipline today. Freedom tomorrow.*



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Follow Up Boss



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# FOLLOW UP BOSS: PUT EVERY LEAD IN THE RIGHT PLACE.

THE RIGHT STAGE. THE RIGHT MESSAGE. THE RIGHT TIME.

| STAGE                | WHO THEY ARE                          | YOUR NEXT MOVE                                |
|----------------------|---------------------------------------|-----------------------------------------------|
| LEAD                 | New prospect; no personal contact yet | Make contact immediately                      |
| NURTURE              | Not yet reached                       | Follow up biweekly                            |
| WATCH                | Has an obstacle before moving forward | Follow up quarterly                           |
| HOT PROSPECT         | Engaged and actively searching        | Qualify timeline, financing & property        |
| HOMEOWNER            | Prospect who currently owns property  | Discover sell, rent, refi or hold plans       |
| NEED APP             | Ready to speak with a lender          | Make introduction and follow up weekly        |
| A – BUYER ≤ 90 DAYS  | Plans to buy within 3 months          | Follow up weekly                              |
| B – BUYER ≤ 6 MONTHS | Plans to buy within 6 months          | Follow up monthly                             |
| C – BUYER ≤ 1 YEAR   | Plans to buy within 12 months         | Follow up every 3 months                      |
| S – BUY + SELL       | Must sell while purchasing            | Discuss process + provide ongoing home values |
| BUYER / SELLER       | Actively represented                  | Manage active transaction relationship        |
| PENDING              | Currently in escrow                   | Maintain transaction follow-up                |
| CLOSED / PAST CLIENT | Successfully closed                   | Stay in relationship and provide value        |
| SPHERE               | Friends, family & personal network    | Provide quarterly value                       |
| TRASH                | Does not want contact                 | Stop communication                            |



## THE CRM RULE:

*If it's not documented, staged, and scheduled in Follow Up Boss, it isn't a follow-up plan.*

*Discipline today. Freedom tomorrow.*



# DAILY PROSPECTING PRODUCTIVITY TRACKER

DATE: \_\_\_\_\_

AGENT: \_\_\_\_\_

TRACK YOUR ACTIONS. CREATE OPPORTUNITIES. BUILD MOMENTUM.

## TODAY'S RESULTS



CALLS

\_\_\_\_\_



CONTACTS

\_\_\_\_\_



APPOINTMENTS

\_\_\_\_\_



LOAN APPS

\_\_\_\_\_



NEW CONTACTS

\_\_\_\_\_

## OPPORTUNITIES CREATED

| CONTACT NAME | SOURCE | B<br>BUYER               | S<br>SELLER              | B/S<br>BUY/SELL          | LOAN<br>OPPORTUNITY | NEXT ACTION |
|--------------|--------|--------------------------|--------------------------|--------------------------|---------------------|-------------|
|              |        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                     |             |
|              |        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                     |             |
|              |        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                     |             |
|              |        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                     |             |
|              |        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                     |             |
|              |        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |                     |             |

## DAILY REFLECTION

HOW PRODUCTIVE WAS I TODAY?

1

2

3

4

5

6

7

8

9

10

WHAT WENT WELL? \_\_\_\_\_

WHAT GOT ME OFF TRACK? \_\_\_\_\_

MY BIGGEST OPPORTUNITY FROM TODAY: \_\_\_\_\_



*Small daily actions compound into  
extraordinary results.*



# WEEKLY SCORECARD + 90-DAY ACTION PLAN

WEEK \_\_\_\_\_ OF 13

TRACK THE ACTIVITY. TRUST THE PROCESS.

| KPI                      | GOAL  | ACTUAL |
|--------------------------|-------|--------|
| Power Hours Completed    | _____ | _____  |
| Calls Made               | _____ | _____  |
| Contacts Made            | _____ | _____  |
| Buyers Identified        | _____ | _____  |
| Sellers Identified       | _____ | _____  |
| Buy / Sell Opportunities | _____ | _____  |
| Lender Referrals         | _____ | _____  |
| Loan Applications        | _____ | _____  |
| Home Value Reports       | _____ | _____  |
| Buyer Appointments       | _____ | _____  |
| Listing Appointments     | _____ | _____  |
| New Contacts Added       | _____ | _____  |



## THIS WEEK'S WIN

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## MY BIGGEST OPPORTUNITY

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## NEXT WEEK, I WILL IMPROVE...

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## MY 90-DAY PROMISE

*I will focus on the actions I can control. I will create conversations, follow up consistently, keep my database organized, and always schedule the next step.*

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Discipline today. Freedom tomorrow.

# THE PROSPECTING POWER UP 90-DAY CHALLENGE

A MASTERCLASS FOR REAL ESTATE  
PROFESSIONALS WHO ARE READY TO  
BUILD BETTER HABITS,  
CREATE MORE CONVERSATIONS,  
AND CLOSE MORE TRANSACTIONS.

## PROSPECTING POWER UP 90-DAY CHALLENGE

DISCIPLINE TODAY.  
FREEDOM TOMORROW.

### ABOUT SHANA —

Shana Gates is Principal Partner and Chief Strategy Officer of Craft & Bauer | Real Broker. A licensed Realtor since 2006, Shana has been dedicated to helping clients achieve their real estate goals with exceptional professionalism and expertise.

Since 2012, she has focused on the luxury real estate market, gaining invaluable experience at Partners Trust in Beverly Hills. This exposure to high-end properties and discerning clientele has shaped her ability to deliver world-class service and results.

As a resident of Indian Wells, Shana leads an award-winning team of specialists renowned for providing concierge-level service and innovative marketing tailored to luxury buyers and sellers. Her dedication to exceeding client expectations and delivering personalized solutions has solidified her reputation as a trusted advisor in the luxury market.

Shana and her husband split their time between their homes in Indian Wells, Marina del Rey, and Chautauqua, New York. In her free time, she enjoys being with her family and caring for her beloved Golden Retriever, Koda.

“

*You don't need more leads.  
You need a system that turns  
every lead into an opportunity.*

*Shana Gates*

PRINCIPAL PARTNER & CSO  
CRAFT & BAUER | REAL BROKER

#### WEBSITES

Shanasells.com  
SearchCoachellaValleyHomes.com  
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