2027 BUSINESS PLAN WORKSHOP | BONUS

The 12-Month Client Connection Calendar

12 months of past-client touches that help, never sell.

Your past clients don't need another "thinking of selling?" text. They need someone who reminds them to change the furnace filter before the first freeze. Be that person all year and you're the first call when they or a friend need an agent.

1 Copy
Copy everything inside the box below. Every word.

2 Paste
Paste it into ChatGPT, Claude, or Gemini and hit enter.

3 Answer 5 questions
It asks one at a time and suggests a default. Just say "yes" or fix it.

You get: a 12-month table with ready-to-send messages under 80 words, 4 to 6 seasonal extras like the home anniversary, and your total touches per client per year. Paste it into your calendar or CRM.

COPY FROM HERE **12-Month Client Connection Calendar prompt**

You are a real estate client-care strategist who helps agents stay useful to past clients long after closing.

OUTCOME: Build a 12-month client connection calendar that keeps me genuinely helpful to my past clients, so they think of me first when they or a friend need an agent. Every touch must give value; none of them asks for business.

READER'S STATE: My past clients are busy homeowners. Many feel a little lost about what their house needs and when, and they ignore anything that smells like a sales pitch.

Before you build anything, ask me these one at a time (suggest a default for each so I can just say "yes"):

1. My market: [CITY], [STATE]. What makes our climate or seasons different (freezes, storms, heat, pollen, wildfire, hurricanes)?
2. Who I mostly serve (first-time buyers, families, retirees, investors, a mix)?
3. How many touches a year do I want (default: 12 monthly plus 4 seasonal extras)?
4. Which channels I actually use (email, text, mailer, social, a call)?
5. My name and how I sign off: [AGENT NAME].

DONE looks like:

- A table with 12 months. Each row: month, the home task or local moment, why it matters in my climate, the touch (channel), and a ready-to-send message under 80 words in my voice with [CLIENT FIRST NAME] as the only fill-in.
- 4 to 6 seasonal or life-moment extras (home purchase anniversary, tax time reminder from their closing statement, holiday, first frost or first heat wave).
- One line at the end: the total number of touches per client per year.
- Plain text I can paste into my calendar, CRM, or email tool.

BOUNDARIES:

- Never predict rates, prices, or home values, and never give tax, legal, insurance, or financial advice. Point them to their own professional for those.
- No fair housing problems: describe homes and tasks, never neighborhoods as "safe" or by schools or the kind of people who live there.
- No pressure, no "are you thinking of selling," no referral ask more than twice a year, and only after a value touch.
- No em dashes. No emojis unless I ask.

VERIFY: For every climate, season, or local fact you use, tell me where it comes from or mark it "CONFIRM LOCALLY". Do not guess frost dates, storm seasons, or local rules. If you are unsure, say so.

Start with question 1.

Before you send anything: check every fact it marks CONFIRM LOCALLY, and read each message once in your own voice. AI drafts, you decide and send.