Embedded Revenue Leadership for Owner-Led Businesses

REVEL Realty Sales Playbook

SDR Edition

The complete craft of finding and qualifying Head Coach teams.

How the full REVEL sales process works, where the SDR fits, and what good looks like across research, customization, outreach, gifting, and handoff.

CLIENT	REVEL Realty Inc.
ENGAGEMENT	Sales System Build
VOLUME	1 of 3 · SDR · AE · AM
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STATUS	Working draft

How to Use This Playbook

This is a working document. Not a reference manual. Not something to read once and file away.

This is the SDR edition of the REVEL Sales Playbook. There are three volumes in total, one for each role in the sales process. SDR, AE, and AM. Every rep, no matter their role, sees the full picture in Part One. Then each volume goes deep on the role it is built for.

This volume is built for the SDR. The first part is shared across all three volumes and walks through the entire REVEL sales process so every rep understands where their work fits in the bigger picture. The rest goes deep on what the SDR actually does, day to day, on a finite list of named accounts.

THE LIST IS FINITE, SO TREAT IT THAT WAY

There are roughly 500 teams in Ontario that fit the Head Coach model. That single fact changes how the SDR job works. You do not blast a finite list. You work it like a key account.

SIMPLE BEATS CLEVER

If a rep cannot explain their part of this process back to leadership in five minutes, it is too complicated. Strip it down until it is obvious.

PROCESS WITHOUT ENFORCEMENT IS A SUGGESTION

This only works if leadership inspects it, coaches to it, and holds people to it. A playbook sitting in a shared drive does nothing.

Read it. Train to it. Inspect it. Improve it. Repeat.

PART One

The Sales Process

Shared across the SDR, AE, and AM volumes. The same picture, so every rep sees how the whole thing fits together. **This is where you are. This is where you fit.**

/ 01 · THE REVEL SALES MODEL

The REVEL Sales Model

Selling a Head Coach is not a one-off transaction. Each signed office is the start of a revenue relationship that grows over years. So the sales process runs in two arcs. Land the office, then grow it.

Most sales motions have a single objective. Close the deal. REVEL's has two. First, land the Head Coach and open the office. That is what the SDR and the AE do together. Second, grow the office, meaning grow the number of productive realtors inside it. That is what the Account Manager does once the agreement is signed.

This matters because a signed office that does not grow is a fraction of the value of one that does. An office that goes from five agents to fifteen in two years is worth far more than one that just sits at its starting size. REVEL does not get the second arc for free. It requires its own deliberate role and its own playbook. That is why this engagement builds all three.

The land and grow logic

	Land the office	Grow the office
The work	Find a fit. Earn trust. Close.	Launch. Support. Drive agent growth.
The cycle	Months from first touch to signature.	Years. Continuous.
The roles	SDR and AE.	Account Manager.
Won when	Head Coach signs and the office opens.	The office grows its productive realtor count.

WHY THIS IS BUILT AS ONE PROCESS, NOT TWO

The handoffs between roles are where most companies leak value. A great hunter signs an office and disappears. A great farmer inherits a vague relationship and starts from scratch. The REVEL playbook is built so the SDR feeds the AE cleanly, the AE feeds the AM cleanly, and nothing about the Head Coach's situation gets re-asked or forgotten in between.

The Three Roles

Three roles. Two arcs. One continuous process from cold name to growing office.

The reason the work splits into three roles is simple. Opening 100 conversations a week, closing a six-figure business decision, and growing an established Head Coach's office over years are different jobs done by different people with different temperaments. Asking one person to do all three means none of them get done well.

Who owns what

Role	Owns	Hunter or farmer	Measured by
SDR	Finding the right teams. Earning the first qualified conversation. From cold to a booked, qualified discovery.	Hunter	Activity, discoveries booked, SQLs.
Account Executive	Discovery through close. The relationship, the Niagara meeting, the offer, the signature. This is John.	Closer	Discoveries completed, pipeline, deals closed, win rate.
Account Manager	Everything after the signature. Launching the office. Running the relationship. Growing the realtor count inside it.	Farmer	Same-store net realtor growth.

How the roles connect

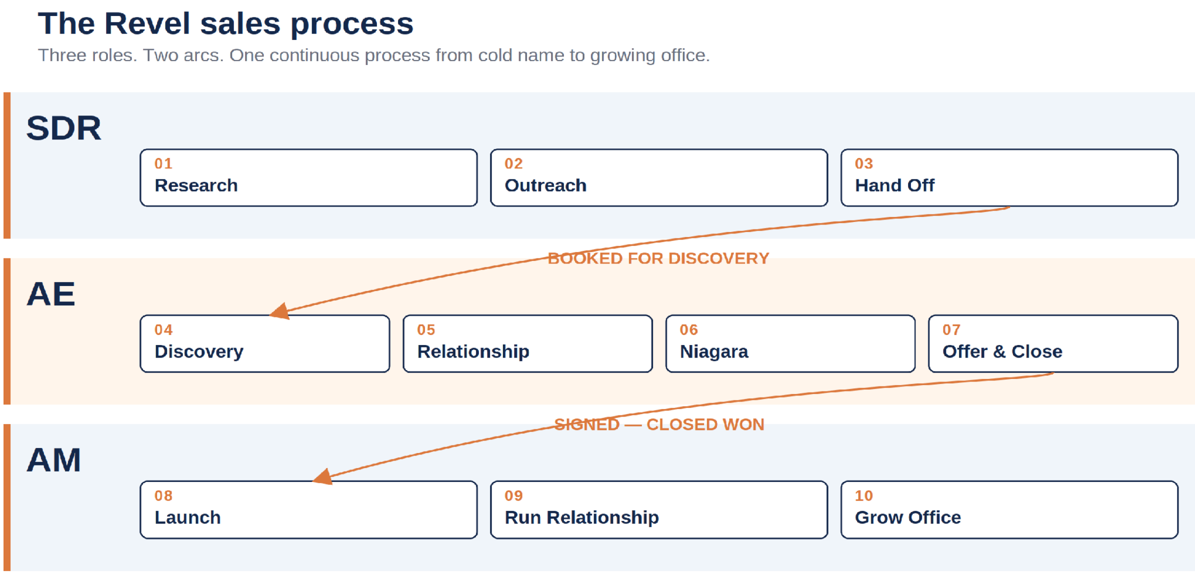
Each role has a clean handoff to the next, with the prior rep's work fully visible to the next rep. The SDR builds the relationship and the qualification, then John inherits everything they learned and runs the close. John builds the trust through Niagara and signs the office, then the AM inherits everything John learned and runs the launch.

Nothing gets re-asked. Nothing gets lost. The Head Coach feels like REVEL knows them, because REVEL does.

> **WHY THIS MATTERS FOR EVERY REP**
>
> Even though each role goes deep on its own part, every rep should be able to explain what the other roles do. A team where each rep understands the whole sells better than one where each rep only knows their lane.

The Full Picture

Ten stages across the three roles. Two critical handoffs. One unbroken process from a name on a list to a Head Coach office growing its agent count.



The full REVEL sales process. Three lanes. Ten stages. Two handoffs (SQO and Closed Won).

Walking the stages

Stages 1 to 3: SDR. From cold to qualified.
The SDR owns the front end. They research the target, build the angle, run the multi-channel outreach sequence, and have the qualifying conversations that surface fit. Qualification is embedded in the outreach itself, not a separate call. When the team leader is engaged and the conversation confirms fit, the SDR books John's discovery directly. The meeting only counts as a Sales Qualified Lead when it passes the SQO gate after John runs that discovery.

Stages 4 to 7: AE. From qualified to signed.
John inherits the qualified opportunity. He runs the full discovery to confirm fit and uncover the real situation. He builds the relationship, brings the peer proof, invites the right teams to Niagara, delivers the offer, and gets the signature. This is where REVEL's close rate is already strong. The work in stages 1 to 3 is what fills the room with the right people.

Stages 8 to 10: AM. From signed to growing.
Once it is signed, the AM takes the relationship and runs the 90 day launch. From there, an ongoing relationship runs to support the Head Coach and drive agent growth inside the office. The AM is measured not on retention or satisfaction but on same-store net realtor growth. The number of productive agents added inside the offices they already own.

The two critical handoffs

- **SQO handoff.** SDR to AE. A discovery only becomes an SQL after John has run it and confirmed the team fits. This gate protects John's calendar and the quality of the pipeline.

- **Closed Won.** AE to AM. The signed agreement triggers the launch. The AM inherits everything John knows about the Head Coach so the launch feels like a continuation, not a handoff to a stranger.

Where the SDR Fits

Everything in the rest of this playbook lives in stages 1 to 3. Research, outreach, qualification, and the handoff to John.

The SDR sits at the front of the entire sales process. Nothing downstream happens unless they do their job. John can be the best closer in the country, but if the room is empty, he closes nothing. The Niagara meeting is the strongest part of the REVEL close, and the SDR is what fills it with the right people.

What the SDR is and is not

WHAT IT IS NOT

A dialer. A target list of 5,000 names. Throughput at any cost. Generic templates sent at scale. Measured on raw call volume. Burning cold names because there are always more.

WHAT IT IS

A named-account hunter. 250 specific teams, owned and worked over months. Custom outreach. Patience. Multi-channel. Treats every name like it cannot be replaced, because it cannot.

The SDR's job, in one line

THE JOB

Find the right teams, earn the first qualified conversation, and hand them to John in a state where he can close them. Nothing else.

How the SDR is measured

Three core metrics for the SDR role. They build on each other. Activity feeds discoveries. Discoveries feed SQLs.

Metric	What it is
Sales activity	Calls, emails, LinkedIn touches, social engagement, gifts sent. The work going into the book. The leading indicator everything else depends on, and the main thing to watch during the ramp.
Discoveries booked	Meetings set with a team leader. The bridge between activity and qualified pipeline.
SQLs	Sales Qualified Leads. Discoveries that pass the SQO gate after John runs them. This is what the SDR's variable pay is tied to. The real output.

PART Two

What Makes This SDR Job Different

/ 05 · THE FINITE LIST REALITY

The Finite List Reality

This is the part that makes REVEL's SDR motion different from almost every other one. Understand this and the rest of this playbook makes sense. Miss it and you will burn the whole market in a month.

The finite list, in numbers

Why this is a named account job, not a high volume SDR motion.

~500
Ontario teams that fit the Head Coach model
The entire addressable market

250
Per SDR. A named book of business
Owned, scored, segmented by market

40–50
Active accounts per SDR at any time
Worked through the full sequence

the rest
In the warming and nurture layers
Worked lightly until they re-enter active

THE RULE
Every name on the 250 is one of only 250. A burned target is not replaceable next week. Slow down and make the touch good.

From the full Ontario market down to what each SDR actually works at any given time.

The 500 and why it changes everything

There are roughly 500 teams in Ontario that genuinely fit the Head Coach model. Not 5,000. Not 50,000. About 500. The number might shift a little once the list is built and validated, but it will not shift by much. Split across two SDRs, that is about 250 named teams each.

250 is a small, knowable, finite world. Every name on it is a real person running a real business in a market REVEL cares about. That fact changes everything about how the SDR works.

Why this is not a normal SDR job

In most industries the prospect list is effectively infinite. An SDR's job is throughput. Burn through names, send the same three templates to a thousand people, and a generic miss costs nothing because there is always another name. The list is renewable and the game is volume and speed.

REVEL is the opposite. The list is fixed and it depletes. If an SDR torches one of the 250 with a lazy, generic touch, that team can be dead to REVEL for 6 to 12 months. You cannot spray and pray, because you would burn the entire addressable market in a few weeks and have nothing left to work. So this is not really a volume SDR job. It is a named account job that happens to use SDR discipline.

	A normal SDR motion	REVEL's motion
The list	Effectively infinite, renewable	About 250 per rep, fixed, depletes
The game	Throughput and speed	Coverage, depth, and patience

	A normal SDR motion	REVEL's motion
A bad touch	Costs nothing, next name please	Can burn a real target for a year
Messaging	Templates sent as-is at scale	Custom angle per account
Measured on	Dials and emails per day	Activity, discoveries, SQLs
Cycle	Days to weeks	Months. Sometimes longer.

THE MENTAL MODEL

Stop thinking like an SDR. Start thinking like a field rep with a named account list. Keep the activity discipline of an SDR, but treat each of the 250 the way an account exec treats a top customer. Research, custom angle, patience, multi-channel, relationship before pitch.

What Great Looks Like

Great SDRs in this seat share a specific profile. The job pulls hard on patience, curiosity, and the discipline to do a small number of things well, not a large number of things fast.

The mindset

- **Patience over urgency.** Most accounts will take months to convert. Touches must be valuable even when the answer is not yet. A rep who can keep showing up usefully without getting needy is the one who wins.
- **Curiosity over pitch.** Great reps want to understand the team leader's situation. Curious questions beat polished pitches. The team leader does most of the talking on a good first call.
- **Quality over quantity.** On a finite list, twenty thoughtful touches beat a hundred lazy ones. The job is not to drown the prospect in noise. It is to land memorably with the right thing.
- **Discipline over flash.** Logging every touch, working the active set every day, sending the breakup email when the sequence calls for it. The work compounds when it is consistent.

The skills

Skill	What it looks like in practice
Research	Finds the one specific detail about a team that makes the opener relevant. Not facts dumped at random, but the angle that earns a reply.
Writing	Can write a 60 word email that gets opened, read, and answered. Short, specific, and never sounds like a template.
Phone presence	Calm on a cold call. Can open in 30 seconds, ask for the conversation, and exit gracefully if the timing is wrong.
LinkedIn fluency	Active and credible on LinkedIn. Comments thoughtfully. Builds visibility before asking for anything.
Active listening	Through email, text, or a call, asks two layers of follow up. Catches the thing under the thing.
Resilience	Sends the next email the day after a tough no. Does not take silence personally.

The output, ranked

Through the ramp and beyond, the order of priorities for an SDR is roughly this. Earlier items take precedence when there is a conflict.

1. Activity. The book is being worked. Every active account is moving.
2. Quality of touches. The work going out is genuinely custom, not lazy.
3. Discoveries booked. Meetings are landing on John's calendar.
4. SQLs. Those meetings turn into qualified opportunities after John runs them.

> THE FIRST THREE MONTHS
>
> Through the ramp, your job is activity and quality of touches, not meetings booked. The funnel takes months to fill. An empty calendar in month one is the right thing happening.

PART Three

Who You’re Targeting

/ 07 · THE IDEAL RECRUITING PROFILE

The Ideal Recruiting Profile

Before any name gets touched, the rep needs to know exactly who REVEL is for. Not vaguely. Specifically. The clearer this is, the less time gets wasted on teams that were never going to convert, and the more the finite list stays clean.

Who REVEL is looking for

Signal	What good looks like
Team size	Established teams of three to ten or more agents. A functioning office, not a solo agent looking for a brokerage.
Production	Real volume. A team already running a real business. The exact threshold to be confirmed with Ryan and Nicki and set on the CRM record.
Market presence	Active in their local market with name recognition. They have built something.
Leadership mindset	Thinks like a business owner, not just a top producer. Coaches their people. Cares about building something bigger than themselves.
Motivation	Wants more autonomy, better economics, or brand control. Frustrated that their current brokerage takes a lot and gives little back.
Geography	In a market REVEL wants to expand into. Priority markets set with Ryan and refreshed quarterly.

Who to walk away from

Knowing who to skip protects the list as much as knowing who to chase.

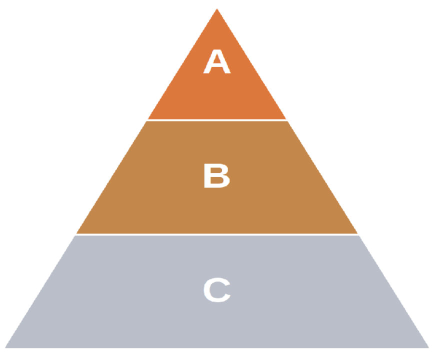
- Solo agents with no team and no intention of building one.
- Teams not producing enough to support an office.
- Leaders who want to be told what to do rather than run their own business.
- People shopping for the cheapest split and nothing else. REVEL does not win that argument and should not try to.
- Teams in markets that are not on the expansion plan.
- Anyone who cannot make a decision without running it through six layers of politics.

Score every account, do not eyeball

Every team on the list gets a fit tier, A, B, or C, against the signals above. The tier lives on the contact record and drives priority and customization depth. This is not busywork. It is what keeps a rep from spending three weeks on a team that a 30 second look at the criteria would have ruled out.

How much custom, by tier

On a list of 250, every account earns real research. The tier sets the depth, not whether to do it.



Tier A
TOP 25 TO 40 PER BOOK
60 to 90 min of research per account. Full account plan. Hand-picked gift in the sequence. Custom video. Months of patient touches.

Tier B
THE MIDDLE 100 TO 150
30 to 40 min per account. Personalized openings with specific references. Trigger-based gifts. Full sequence, lightly tuned to the team.

Tier C
LOWER TIER AND UNKNOWNS
15 to 20 min per account. Still researched and relevant. Templated touches with real custom openers. Monitored for upgrade signals.

How much custom effort each tier gets. Not every account is treated the same. That is by design.

How tiers translate to effort

Tier	Population	Research depth	Sequence depth	Gifting
A	Top 25-40 per book	60-90 min/account	Full multi-channel + custom video	Yes, hand-picke d
B	Middle 100-150	30-40 min/account	Full sequence, custom opening	Trigger-bas ed only
C	Lower tier 60-100	15-20 min/account	Lighter touch templates with real custom openers	None until upgrade

THE DISQUALIFIER THAT MATTERS MOST

A new agent three months in who thinks they have a team is not an A tier lead. Be ruthless about this. The whole point of a finite, scored list is that the rep only ever spends time on teams that can actually become a Head Coach office.

The List and Segmentation

The list is the most valuable asset the SDR works with. It gets built once carefully, validated against the IRP, segmented properly, and then split between the two reps. After that the SDR works a curated list and does not spend their day hunting for names.

How the list gets built

The fastest starting point is John's board pull. It returns first and last name, current brokerage, total units sold, list volume sold, and city. It also returns the board email, which is right 85 to 90 percent of the time because agents rarely update it once it is set. What it does not give is a direct cell number. The board only carries the brokerage number, and more team leaders are hiding behind a single admin line now because they run their team like a brokerage.

So the list build is two steps. Pull the raw universe from the board, then clean and enrich it. Enrichment means finding the direct mobile number, the LinkedIn profile, the social handles, and a first read on fit. The mobile number matters more here than in most SDR motions, because text is a real channel in this sequence and the board only gives the brokerage line. For now this work sits with the SDR team and Sidecar. The two reps split the universe, work it down to active accounts, and enrich as they go. As volume scales it may make sense to add dedicated research support, but that is a problem for later.

Validating the 500

Before anyone works the list, it gets scored against the Ideal Recruiting Profile. The goal is a clean, confirmed count of teams that actually fit. If the validated number comes back closer to 400 or closer to 600, the wave math adjusts, but the approach does not change.

Dividing the book

Split the validated list into two books of business, about 250 each. Divide by geography, not at random, so each rep owns a coherent set of markets and is not stepping on the other. Ownership matters. A rep who owns their 250 treats them like their own book. A rep working a shared pool treats no one like a priority.

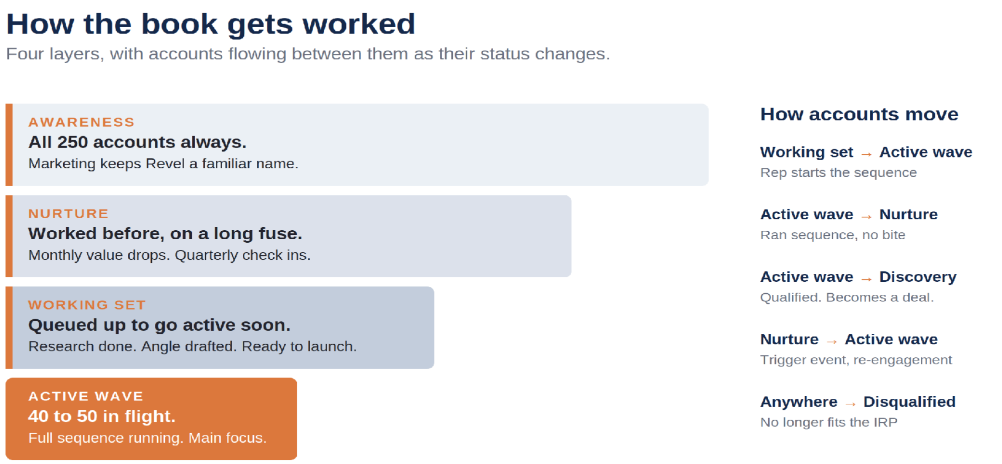
How each book gets sorted

250 is not one undifferentiated pile. Inside each book, sort on four dimensions so the rep knows who to work first and how.

- **Market priority.** Ryan's preference leans toward REVEL's target Ontario markets rather than chasing Toronto's biggest teams. Once he confirms the priority markets, those teams move to the front of the line.
- **Fit tier.** A, B, or C against the IRP. A tier teams get worked first and hardest. C tier teams sit in awareness until something changes.
- **Warmth.** A team that an existing Head Coach can introduce is a different animal than a pure cold name. Referral paths get flagged and used first, because they convert at a far higher rate than anything cold.
- **Trigger state.** A team that just left a franchise, lost a key agent, won an award, or is publicly frustrated with their brokerage is in motion right now. Those get pulled to the top regardless of tier, because timing beats everything.

Working in Waves

Nobody works 250 accounts at once. The book gets worked in layers, with a small active set running the full sequence while everything else sits in lighter touch states. Accounts flow between layers as their status changes.



Four layers. Each account on the book sits in exactly one. The rep manages the flow.

The four layers

Active wave

40 to 50 accounts at any given time. Running the full multi-channel sequence right now. This is where the rep spends most of their week. The active wave is small on purpose. The math works out to roughly one sequence per business day per rep across 20 working days.

Working set

The next 20 to 30 accounts queued up to go active. Research is already done, the angle is drafted, the gifting decision is made. When an account closes, disqualifies, or moves to nurture, a working set account gets pulled into active. The working set means the rep is never starting a sequence cold.

Nurture

Accounts that have been worked before, did not bite this time, and are not active right now. Monthly value drops, quarterly check ins, ongoing social engagement. Most of the book lives here most of the time, and that is fine. In a finite market with established operators, not now is the default answer.

Awareness

All 250 accounts always. This layer is fed by REVEL's marketing engine, not the SDR. Magazine, podcast, social presence, content. The SDR does not actively work this layer, but their cold touches land warmer because marketing is keeping REVEL familiar to the names they have not personally reached yet.

Flow rules

From	To	When
Working set	Active wave	An active slot opens up. Rep starts the sequence.
Active wave	Discovery	Qualified meeting booked. Becomes a deal on John's side.
Active wave	Nurture	Ran the sequence, no bite. Not a no, not yet.
Nurture	Active wave	Trigger event fires, content engagement spikes, or referral path opens.
Any layer	Disqualified	Account no longer fits the IRP. Out of the book.

WHY ACTIVE IS SMALL ON PURPOSE

The temptation is to load up active to look busy. Resist it. 50 accounts run well will produce more meetings than 150 run badly. Quality of touches is the constraint that matters on a finite list, and quality requires a manageable set.

The Outreach Craft

/ 10 · THE ACCOUNT PLAN

The Account Plan

Every A-tier account gets a one-page account plan before the rep starts the sequence. Half a page for B-tier. Nothing for C until they earn an upgrade. The plan is what turns a name on a list into a target the rep actually understands.

This is the single biggest discipline that separates a named-account SDR from a regular SDR. The plan forces the rep to slow down, do the work, and have a real point of view about the team before sending the first touch. It is also what makes coaching possible. A coach can review a plan and improve the angle in 10 minutes. A coach cannot fix a bad cold email after the fact.

What goes in an account plan

Section	What lives there
The team	Team leader name, partner if any, team name, current brokerage, team size, market, production estimate.
The history	How long at current brokerage. Previous brokerages if known. Awards, press, public milestones.
The situation	What is going on in their world right now. Recent posts, recent hires, recent losses, recent wins.
The motivation hypothesis	Why this team might be open to REVEL. Not why they should be. Why they actually might be. Stated in one sentence.
The angle	The one specific opening hook this rep will use. What signal earns the right to reach out, and what is the angle that signal sets up.
The warmth path	Any existing connection. Referral source. Mutual contact. Existing Head Coach who could introduce.
The gifting decision	If A-tier, what gets sent and when. Notes on personalization.
The channel mix	Which channels this team is most active on, and which channel leads the sequence.

The motivation hypothesis

Of all of the sections, this one matters most and is the easiest to do badly. The motivation hypothesis is a one-sentence guess at why this specific team might be open to a conversation right now. It is a hypothesis. It might be wrong. But writing it down forces the rep to make a real bet, which makes the whole touch sharper.

LAZY HYPOTHESIS

John runs a successful team and might be interested in better economics.

REAL HYPOTHESIS

John has been at Re/Max for nine years, just lost his top agent to a rival, and posted three times last *month about the franchise raising fees. Frustration is fresh. Timing is now.*

IF THE REP CANNOT WRITE THE HYPOTHESIS, THEY ARE NOT READY TO SEND

A blank or vague hypothesis means the research is not done. The right answer is to either close the plan and go back to research, or move this account from active back to working set until the angle is real.

Research and the Angle

Because the list is finite and every name matters, the rep earns the right to reach out by knowing something real about the team first. This is the work that turns a generic cold email into a relevant one. It is also the skill that separates SDRs who win at this from SDRs who burn out.

The research checklist

Before opening an account plan, spend focused time. The amount varies by tier. The goal is to find one or two specific, true things that earn the right to be in the team leader's inbox or on their phone.

Source	What to look for	Tier
LinkedIn (personal)	Tenure, recent posts, recent hires, recent celebrations, mutual connections, tone of voice.	All tiers
LinkedIn (team)	Team size, recent hires and exits, who is posting, what they are posting about.	All tiers
Instagram / Facebook	Where really live. Personality, lifestyle, market voice. Often the warmest signal source.	A and B
Their brokerage	Franchise health, recent local news, market share trends, public criticism.	A and B
Local news / awards	Production milestones, community involvement, board roles, market commentary.	A and B
Recent transactions	What they are listing, what they are selling, who their buyers are.	A only
Mutual contacts	Any existing Head Coach who knows them. Any board member. Any shared brokerage history.	A and B
YouTube / podcast	Do they have a show? Have they been on one? Their actual voice and worldview.	A only

Turning research into an angle

Research is the input. The angle is the output. The angle is what the rep will actually open with, and it is the move that separates SDRs who book meetings from SDRs who get ignored.

From research to angle

What you find determines how you open. The signal sets the angle.

WHAT YOU SEE IN RESEARCH	THE ANGLE TO OPEN WITH
Production milestone Award, record month, expansion	**Acknowledge the win** Lead with their achievement
Team change Key agent left, new hire, restructure	**Address the disruption** Frustration is a Head Coach door
Public frustration Posts about brokerage, switch rumours	**Walk through the open door** Quote them respectfully
Brand erosion Franchise losing share, brokerage news	**Reframe the rented brand** Own your office, not rent theirs
Market trigger Inventory shift, local rules, competitor	**Connect the market move** What this shift means for them
Quiet steady state Solid operator, no obvious trigger	**Lead with peer proof** Other team leaders who moved

The signal you find determines the angle you open with. Pattern recognition, not creativity.

Trigger event monitoring

Timing beats almost everything. A team leader who is publicly frustrated this month is a different conversation than the same person six months ago. Set up monitoring so triggers do not get missed.

- **LinkedIn alerts.** Follow every named target. Engagement notifications on for A-tier.
- **Google Alerts.** Set on team name, team leader name, and major brokerages. Quiet but free.
- **Industry sources.** REM, Real Estate Magazine, Inman. Local board newsletters. Watch for awards, moves, news.
- **Existing Head Coaches.** Ask quarterly who is rumoured to be on the move. Best signal in the market because it is private.
- **Brokerage news.** When a franchise raises fees, changes leadership, or loses a flagship office, every team at that brokerage just became more interesting.

> **THE 24 HOUR TRIGGER RULE**
>
> When a real trigger fires on an A-tier account, the rep moves on it within 24 hours. Same day if possible. Triggers do not stay fresh long, and the team leader is making their move now whether REVEL is in the room or not.

The Customization Framework

This is the part of the playbook the rep should re-read before every A-tier touch. On a list of 250, customization is the entire game. Templates with a swapped-in first name are not customization. They are noise. Here is what real custom looks like.

Five layers of personalization

Real customization works in layers. Each layer adds depth, and the depth required goes up with tier. The five layers, from shallowest to deepest:

Layer	What it is	Effort	Minimum tier
1. Name and brokerage	First name, last name, current brokerage. Should never be wrong. Bare minimum.	2-3 min	C
2. Market and team basics	Their city, market dynamics, team size, what they handle locally.	5-10 min	C
3. Team and history depth	Their tenure, where they came from, what they have built, who is on the team.	10-15 min	C
4. Recent specific event	One specific thing that happened this month. A post. A win. A loss. A hire. A change.	15-20 min	B
5. Personal voice and angle	Reflective observation about them as an operator. The angle nobody else would write.	30-60 min	A

What "lazy custom" sounds like vs. "actually custom"

Most reps think they are customizing when they are not. The test is simple. If the same email could be sent to ten other team leaders by swapping out a name and an award, it is not custom. Custom means the email could not be sent to anyone else without rewriting it.

> LAZY CUSTOM
>
> *Hi John, saw your team won the gold award this year. Impressive! I work with team leaders who are tired of paying high splits to a brokerage that does not give much back. A few of them now own their own REVEL office. Worth a quick chat?*

> ACTUALLY CUSTOM
>
> *Hi John, noticed Re/Max Niagara took the regional award again. Fourth straight year. What struck me was your post about Maria stepping up on the commercial side. Bench depth like that is rare. The thing I am curious about is whether the franchise is still pulling its weight for a team that clearly does not need the brand pull anymore. Three Re/Max team leaders made the move to REVEL in the last two years for that exact reason. Open to a 20 minute conversation?*

What makes the second one work

- **It names the specific team and brokerage.** Not just a vague compliment.
- **It references a specific post.** Proves the rep actually looked.
- **It mentions a specific person on their team.** By name. With a specific accomplishment.

- **It offers a reflective observation.** Not flattery. A pointed read on their situation.
- **It plants a clear, testable thesis.** The franchise might not be pulling its weight anymore.
- **It uses specific peer proof.** Three Re/Max leaders, in the last two years. Not just "others have made the move."
- **It makes a clear, low-pressure ask.** 20 minutes. Specific.

> **THE TEST OF REAL CUSTOMIZATION**
>
> Could you send this exact message to any other team leader on the list by swapping in a name and a few facts? If yes, it is not custom. If you would have to rewrite the body to send it to anyone else, it is.

Personalization tokens that actually work

When templates are used as scaffolding, the tokens that get swapped in are the difference between a touch that lands and one that gets deleted. Build templates with rich token slots, not just first name.

Token type	Examples	Where to find it
Specific recent event	"saw your post about losing Maria", "noticed the new office in Fonthill"	LinkedIn, IG, news
Specific person on their team	"Maria stepping up on commercial", "James just hit his cap"	LinkedIn team page
Specific market observation	"with inventory tightening in St Catharines"	Local board data, news
Specific brokerage frustration	"with Re/Max raising the cap again"	Industry news, their own posts
Specific peer outcome	"three Re/Max team leaders made the move in the last two years"	Head Coach roster
Specific shared connection	"Sarah at Coldwell mentioned you might be interested"	Network, Head Coaches

The custom video

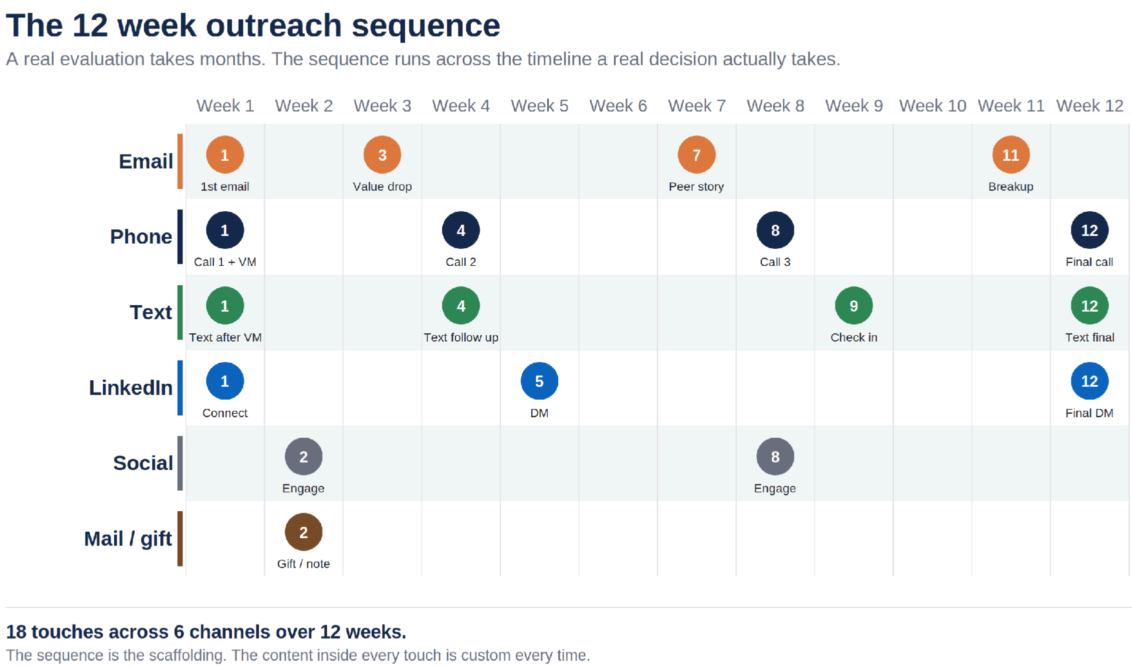
For A-tier accounts, a 60 to 90 second personalized video is a high-impact touch that almost nobody else sends to team leaders. Loom or Vidyard. The rep on camera in front of their screen, walking through one or two pieces of the team leader's world.

- Show their LinkedIn team page on screen, reference a specific person.
- Reference one specific recent post or event.
- Make a clear point about why REVEL might be interesting given what is happening in their world.
- End with a specific ask. 20 minute conversation, named time, named day.

> **VIDEO IS NOT FOR EVERYONE**
> Custom video lands hard for team leaders who live on LinkedIn and Instagram. It feels invasive to a team leader who runs a quiet, traditional operation. Read the account before sending. When in doubt, lead with text and use video as a follow-up touch.

The Outreach Sequence

The sequence is the multi-channel rhythm you run against an active account, across 12 weeks. It is the scaffolding. The content inside every touch is custom every time. Skipping touches is not optional. The follow up is where most cold pipelines die.



12 week cadence. 18 touches. 6 channels. Week numbers move with the account, not the calendar.

Why 12 weeks

A team leader is not deciding whether to move brokerages in a 20 day window. They are deciding over months. A real evaluation involves their partner, their team, their financials, their lawyer, and a hundred quiet moments of weighing whether the discomfort of moving is worth what they would gain. Pushing a 20 day cadence at someone making a 9 month decision is just noise.

So the sequence is built to match the real timeline. Eighteen deliberate touches across 12 weeks, with deliberate breathing room between them. Some weeks are dense with calls, texts, and the planned gift. Other weeks are quiet, with light social engagement only. The pacing lets the team leader think between exchanges and lets your touches land on different moods, different moments in their week, different parts of their decision.

Where the gift sits in the sequence

Each sequence includes one planned mail moment. Most often that lands around week 2, right after the first email, the connection request, and the first call and voicemail. By that point REVEL is already on the team leader's radar, and the gift turns recognition into memory. You can choose to land the mail later in the sequence (week 6 or so) if the situation calls for it, but the cadence is one piece of physical mail, not three. The options below show what to send for that single moment.

- **Opening gift.** A relevant book with a handwritten inscription. The most common default, especially for A-tier.

- **Value mail.** A bound piece of content or industry report relevant to their team. Useful and tangible, without the warmth of a personal gift.
- **Custom market report.** Data on their market and team benchmarked against REVEL offices. Heavier to produce but lands hard for A-tier accounts.

On top of the planned mail, real trigger events can earn a separate gesture. When a trigger fires, send something thoughtful in response. Plan for 3 to 5 business days to source and ship. The note can go out same day by email or LinkedIn, the physical piece catches up the following week.

The 12 week rhythm

Week	Channel	Touch	Purpose
1	Email	First touch	Lead with research and angle. One clear ask.
1	LinkedIn	Connect	Connection request with a brief, specific note.
1	Phone	Call 1 + voicemail	Reference the email. Brief, direct, under 30 seconds.
1	Text	After the voicemail	Short, conversational. Reference the call. Make it easy to reply.
2	Social	Engage	Light, ongoing engagement on their content. Visibility without pitch.
2	Mail	Planned gift (A-tier)	Handwritten note plus the chosen piece for this account.
3	Email	Value drop	A specific insight or piece of content that fits their situation. No ask.
4	Phone	Call 2	Different time of day. Brief value-oriented voicemail.
4	Text	Follow up	Reference the second call. Curious, not pushy.
5	LinkedIn	Direct message	Share something relevant. Light personal observation. No ask.
7	Email	Peer story	Head Coach who came from a similar spot. Real, specific, brief.
8	Phone	Call 3	Brief, no pressure. Different angle. Different time.
8	Social	Engage	Continued visibility on their posts.
9	Text	Check in	Light, conversational. Reference a recent post or specific market thing.
11	Email	Breakup	Direct, honest. Should I close the file? Often the highest reply rate.
12	Phone	Final call	Last call. Brief, no pressure. Specific final ask.
12	Text	Final	Closing the loop. Easy to say not now or never. Door stays open.
12	LinkedIn	Final DM	Polite final message. The door stays open.

Why text matters in this sequence

Team leaders are on the road. They are on showings, in cars between appointments, at closings, dealing with clients. Their email inbox is buried. Their phone is in their hand. Text is the most direct channel into a busy s day, and it lands in a window where they actually have time to reply. A rep who treats text as a real, considered channel reaches conversations email and phone alone would have missed.

Channel mix logic

Not every account gets every channel in the same order. Read the account and adjust.

- **LinkedIn-heavy targets.** Lead with LinkedIn engagement, then DM, then email. Phone and text later or not at all.
- **Phone-and-text-first targets.** Most team leaders. Email gets buried, but they answer texts between appointments. Lean into the phone-and-text pairing.
- **Instagram operators.** Some team leaders run their personal brand on Instagram. Engage there first, then move to LinkedIn or email.
- **Referral path active.** If a Head Coach can introduce, that introduction replaces the cold opener. Email becomes a warm follow up to the introduction.

> **SKIPPING TOUCHES IS NOT OPTIONAL**
>
> When you skip touches, you are deciding the prospect is not worth the work. On a finite list, that is not your call. If the account is in your active wave, every touch happens. If you are over capacity, the answer is fewer active accounts, not fewer touches per account.

Email Outreach

Email is the workhorse of the sequence. It is also where most cold outbound dies. The rules below are about getting an email opened, read, and answered without sounding like a template.

The five rules of cold email

1. **Short.** 60 to 90 words. If it is longer, it is not custom enough. The team leader is busy. Respect their time.
2. **Specific.** At least one detail that proves the rep actually looked. Their team, their post, their market, their person.
3. **About them, not REVEL.** Lead with their world. REVEL comes in for one sentence at most. The whole point is to earn a conversation, not to pitch.
4. **One ask.** Twenty minutes. Specific. Easy to say yes to. No calendar links in the first touch, that signals process not interest.
5. **Human.** Conversational. No corporate language. No "hope this finds you well." Write like a person who has done the homework.

Subject line craft

Subject lines do most of the work of whether the email gets opened. Patterns that work for team leaders:

Pattern	Example	Why it works
Their team plus a thought	Re/Max Niagara + a quick thought	Specific. Curious. Low effort to open.
Question about their world	How is the Fonthill office going?	Personal. Sounds like someone who knows them.
Reference to a specific thing	Saw the award	Cryptic in a good way. Forces the open.
Person on their team	Maria + a question	Highly specific. Almost always gets opened.
Light contrarian	Should you still be at Re/Max?	Pointed. Works for trigger-state targets.

Email templates as scaffolding

These are starting points across the 12 week sequence. Every send gets rewritten enough that it could not be sent to anyone else. The brackets are not optional fill-ins. They are placeholders for the work you have already done in the account plan. If you cannot fill a bracket with something specific to this team, the touch is not ready to go.

Week 1: First touch

> FIRST TOUCH, A-TIER
>
> *Subject: [Their team or brokerage] + a quick thought*

Hi [Name],

[One specific thing you noticed in research. A recent post, a hire, an award, a market shift they commented on. Two sentences max, in their language not yours.]

What got me thinking about you specifically: [one sentence motivation hypothesis, stated as curiosity or observation. Not a pitch. Why this team, not the team next door.]

[One short line of peer proof. A specific Head Coach who came from a similar spot, what they decided, what changed for them. Use names where you can.]

Worth 20 minutes to compare notes? No deck, no pitch. Just a conversation.

[Rep]

Week 3: Value drop

VALUE DROP, NO ASK

Subject: Saw this and thought of [their team]

Hi [Name],

[Specific piece of content, insight, market data, or article you are sharing. One sentence on what it is.]

Sharing because of [the specific reason it fits their situation. Their post, their market, what they are working on]. Not pitching anything, just thought it would land for you.

If it is useful, glad to hear it. If not, no need to reply.

[Rep]

Week 7: Peer story

HEAD COACH STORY

Subject: One story I think you would relate to

Hi [Name],

[Head Coach name] left [their old brokerage] in [year] after [the specific situation that parallels this team's situation]. They opened their REVEL office in [market], and in [time frame] they went from [starting agent count] to [current agent count].

Sharing the story because [the specific parallel to this team]. I am not saying it is your path. I am saying it might be worth understanding what made it work for them.

Open to 20 minutes?

[Rep]

Week 11: Breakup

SHOULD I CLOSE THE FILE?

Subject: Should I close the file?

Hi [Name],

I have reached out a few times over the last couple of months and have not heard back, which usually means the timing is off or it is just not for you. Both are fine.

If it is timing, tell me when to check back and I will stay out of your inbox until then. If it is a no, no hard feelings.

Either way, [one specific genuine acknowledgement of something you respect about what they have built]. Wishing you the best with it.

[Rep]

THE BREAKUP GETS THE HIGHEST REPLY RATE

Reps hate sending it because it feels like giving up. It is not. It is closing the loop. It also forces a response, and the response, even if it is "check back in six months," is worth more than another month of silence.

Phone Outreach

Phone is the second workhorse. Done well, it earns the conversation directly. Done badly, it sounds like every other cold call the team leader has had this month. The bar is low, which is good news for the rep who actually prepares.

Before picking up the phone

The 90 seconds before a cold call matter more than the 30 seconds on the call. Reps who win on the phone do this every time:

- Re-read the account plan. Refresh the angle.
- Have one specific thing to lead with, by name.
- Know the one ask and exactly how it sounds out loud.
- Stand up. Voice carries energy when standing.
- Smile before dialing. Sounds corny. It works.

The opener

> **COLD CALL OPENER, 30 SECONDS**
>
> *Hi [Name], this is [Rep] over at REVEL.*
>
> *I know I am catching you cold, so I will be quick. I noticed [the specific thing from research, by name]. The reason I am calling is [one sentence motivation hypothesis stated as curiosity].*
>
> *I work with team leaders in your spot who outgrew what their brokerage gives back. A handful of them now run their own REVEL office.*
>
> *Not pitching anything. Just wanted to see if it is worth 20 minutes to compare notes. Are you open to a short conversation?*

Handling the most common pushback

> **"I AM BUSY RIGHT NOW"**
>
> *Totally fair, I figured I might be catching you mid something.*
>
> *Can I just send you a short note so you have it, and find a better time? What is the best email for you?*

> **"I AM HAPPY WHERE I AM"**
>
> *Glad to hear it, that is genuinely a good place to be.*

> *If anything ever changes, I would still love to be on your radar. Quick question while I have you: out of curiosity, what would have to be different for you to even consider a conversation? I will leave you alone if it is not for you.*

> **"I HAVE HEARD OF REVEL"**
>
> *Good, hopefully something good!*
>
> *What you might not know is what the Head Coach model actually looks like under the hood. It is not really comparable to what most brokerages are selling. Twenty minutes and I can show you what makes it different. Worth a short conversation?*

The voicemail

Voicemail is not a wasted call. A specific, brief voicemail makes the next touch warmer, because the team leader has now heard the rep's name. Rules:

- **Under 20 seconds.** If they wanted a long explanation, they would answer.
- **Name and company at start and end.** If they only catch the first or last few seconds, they should still know who called.
- **One specific reason.** Reference the email or the specific thing about their team. Not just "following up."
- **A specific next step.** "I will follow up with an email" or "I will try you again Wednesday." Not "call me back."

> **VOICEMAIL TEMPLATE**
>
> *Hi [Name], it is [Rep] at REVEL.*
>
> *Reaching out because [specific thing about their team]. Sent you a short note this morning, just wanted to put a voice to it.*
>
> *I will follow up by email. Have a good one.*
>
> *Again, [Rep] at REVEL.*

Texting

team leaders live on their phones. They are between appointments, in their cars, at showings, dealing with clients. They check texts faster than emails because their text inbox is less crowded. Done well, text is the most direct channel into a busy team leader's day. Done poorly, it feels invasive and burns the relationship.

Why text works for this audience

- **They are mobile most of the day.** Email inboxes get checked at a desk. Texts get answered in the car between appointments. The chance of a reply during business hours is higher than any other channel.
- **Their text inbox is curated.** Clients, family, team, a few business contacts. A thoughtful text from a known name stands out. A thoughtful text from an unknown name with a real reason for being there earns a read.
- **Real estate is already a texting business.** Team leaders text clients all day. They understand the rhythm. A short, professional, well-timed text feels native to them.
- **The reply is fast or honest.** If they are interested, they answer within hours. If they are not, they say so or stay silent. Either signal is more useful than the slow fade of unanswered emails.

Six rules for cold texting team leaders

1. **Brief.** Two or three short sentences. Under 280 characters. If it does not fit on one screen, it is too long.
2. **Reference the prior touch.** Always. The voicemail. The email. The post. The text is a continuation, not a cold opener.
3. **Identify yourself.** Name and REVEL in every text. Never assume they have it from a saved contact.
4. **One ask.** Low pressure. Easy to reply yes, no, or not now.
5. **Business hours only.** 9am to 6pm, Monday to Friday, their local time. No exceptions for keenness.
6. **Stop if they stop.** Three text touches across the 12 week sequence. If neither lands, text is closed for this round. Move back to email.

Templates

As with email and phone, templates are scaffolding. The detail inside is custom every time.

> WEEK 1, AFTER THE VOICEMAIL
>
> *Hi [Name], [Rep] from REVEL. Just left you a quick voicemail.*
>
> *No need to call back, just wanted to put it on your radar. The thing I am curious about is [one short specific reference from research].*
>
> *Worth 20 min this week or next? Easy to say no.*

WEEK 4, AFTER THE SECOND CALL

[Name], [Rep] at REVEL.

Saw [specific recent post, milestone, or market thing]. Made me think about what I emailed you about earlier.

Genuinely curious how you are thinking about [their situation]. Open to a quick chat?

WEEK 12, FINAL

[Name] – closing the loop on my outreach. If the timing is off, tell me when to check back. If it is just not for you, no hard feelings.

Either way, appreciate you. [Rep] at REVEL.

What does not work in a text

- Long paragraphs of explanation. If it needs explaining, it goes in an email.
- Multiple questions at once. One ask per text.
- Calendar links in the first text. Feels transactional. Save it for after they say yes.
- Generic "just following up" with no specific reference.
- Anything that sounds like an automated platform sent it. The whole point of text is that it feels like one human typed it to another.
- Fake urgency. "Just had a cancellation, can do today" is the kind of thing that ends the relationship.

The phone and text pairing

The most effective combination in the sequence is call plus text on the same day. The call gets the voicemail. The text reinforces the voicemail with context and makes it easier to reply. Many team leaders will text back something useful even when they would not have called back. That reply, even if it is "check back in three months," is more valuable than another week of silence.

TEXT IS THE HIGHEST LEVERAGE CHANNEL FOR THE TIME IT TAKES

A 30 second text can produce a response that a week of emails could not. But the bar to keep that leverage is high. The moment text becomes lazy, generic, or pushy, it stops working entirely. Treat every text like a small piece of writing worth doing well.

LinkedIn and Social

LinkedIn is not a backup channel. For most team leaders in this market it is the primary place they live professionally. The SDR who treats LinkedIn as a real channel, not a place to send a generic connection request, wins conversations that email and phone never would.

The SDR's own profile matters

Before any LinkedIn outreach, the rep's own profile has to look right. A team leader who gets a connection request from a rep with a bad photo, no bio, and three connections will not accept. The rep's LinkedIn is part of their selling tool.

- Professional headshot. Not a selfie, not a stock photo, not blank.
- Headline that says what they actually do. "Working with team leaders at REVEL Realty" beats "Sales Development Representative."
- Background image that signals REVEL. Provided by marketing.
- Bio that reads like a real person. A short paragraph about why they do this work and who they help.
- Content posted regularly. Light original posts, comments on relevant content, shares of REVEL material with their own angle.

The connection request

Connection requests with no note get accepted maybe 20 percent of the time. With a specific note, that climbs significantly. Three rules:

- **Always include a note.** Always.
- **Reference something specific.** Their team, their post, their market. Not "I would love to connect."
- **No ask.** The connection request is not the pitch. Asking for a meeting in the first touch poisons the well.

> **CONNECTION REQUEST, 280 CHARACTERS MAX**
>
> *Hi [Name], saw [specific thing about their team or post]. Following the work you are doing in [market]. Would be great to be connected. No agenda, just appreciate what you are building.*

Engagement before outreach

The rep who comments thoughtfully on a team leader's posts for two weeks before sending a DM is a different animal than a stranger who just shows up asking for a call. Engagement is the warm-up.

- **Comment, do not just like.** One specific sentence. Adds value or agrees with a specific point. Not "Great post!"
- **Be early.** First five comments on a post get the most visibility from the author.
- **Be useful.** Share a piece of content that fits what they posted about. Tag them only if it is genuinely relevant.

- **Consistency over volume.** Comment on three posts a week across the active set, not 30 in one night.

LinkedIn direct messages

DMs land harder than email because the inbox is less crowded. Same rules as email: short, specific, about them, one ask. Two patterns work well at different points in the sequence.

> **DM, MID-SEQUENCE, SHARING VALUE**
>
> *Hi [Name], saw this and thought of you. [Link to article, insight, or piece of REVEL content].*
>
> *It made me think about [specific thing they posted about recently or their team's situation]. Curious if it lands the same way for you.*
>
> *[Rep]*

> **DM, LATE-SEQUENCE, VOICE NOTE OPTION**
>
> *Hi [Name], reached out a few times. Recorded a 90 second video walking through what I think is happening in your spot at [their brokerage] and why some team leaders in your shoes have made the move to REVEL.*
>
> *Worth a look? If not, no hard feelings, I will close the loop.*
>
> *[Link to video]*

> **LINKEDIN IS A RELATIONSHIP CHANNEL, NOT A TRANSACTION CHANNEL**
>
> Email and phone are about getting the meeting. LinkedIn is about being a familiar, credible presence in the team leader's professional world. The two work together. Treat LinkedIn as a long game and the short game gets easier.

Direct Mail and Gifting

On a finite list of 250, this is one of the highest leverage things the SDR can do. Direct mail and gifting cut through digital noise in a way that no email ever will. A handwritten card on someone's desk is a different signal than a 47th cold email. Done right, it is the most memorable touch the rep can land.

Done wrong, it looks like swag. The point is to land memorably, not to look generous. A logo'd water bottle in a box does not impress a team leader who runs a successful business. A handwritten note with a thoughtful book does.

The gifting program

Tier and trigger decide what to send. The point is to land memorably, not impressively.

When	Tier A	Tier B	Tier C
Planned: opening gift	Handwritten note + signed book with personalized inscription.	Handwritten note on Revel card. No gift yet, earn it.	Card with a written note. Brief and warm.
Planned: value mail	Bound personalized piece. Book + note, or relevant report.	Not the default. Standard sequence sends a card if needed.	Email value drop only.
Planned: market report	Custom market data for their team. Bound piece.	Email a market insight piece instead.	Email value drop only.
Trigger response	Curated gift, 3 to 5 days to source and ship. Card same day.	Same-day card. Small gift if it makes sense.	LinkedIn comment + like. Flag for upgrade.
Pre Niagara	Niagara dimensional mail kit + itinerary tease.	Email and call to confirm.	Not applicable at this stage.
Breakup	Bound farewell gift. Leather notebook + note.	Plain text last email. No gift.	Plain text breakup.

The gifting matrix. Tier and trigger decide what goes out, and when.

Why this works for REVEL specifically

Three reasons direct mail and gifting punch above their weight in this motion:

- **The list is finite,** so the cost per touch math actually works. A $50 gift to one of 250 named accounts is not a real budget problem. A $50 gift to one of 50,000 prospects would be.
- **Team leaders are established.** They already have brokerage swag. They do not need another mug. A truly thoughtful gift signals that REVEL is not a brokerage chasing them like the others.
- **Real estate is a relationship business.** Team leaders take note of who shows up with effort and who does not. A memorable touch becomes a story they tell.

The gifting tiers

Tier A: the hand-picked program

Top 25 to 40 accounts per book. These are the targets you are investing the most in. One planned mail piece per sequence, custom to the account, not from a catalogue. Every gift includes a handwritten note signed by you. No printed cards. The table below shows the menu of options for what to send and when to send it. You pick one as the planned moment in the sequence. Trigger-based gifts sit on top of that when real triggers fire.

Option	What to send	Estimated cost
Opening gift (default, week 2)	A relevant business book with a personalized inscription explaining why this specific book for this specific person. Handwritten card.	$40-60
Value mail (week 5 or 6)	Bound, personalized piece. A relevant book, a REVEL piece tailored to their situation, or a curated industry report. Lands as pure value, no ask.	$30-60
Custom market report (week 8 to 10)	Bound market report on their team's local market vs REVEL offices. Their data on the cover. Heavier to produce, lands hard for the right account.	$30 + design time
Trigger response (whenever a trigger fires)	Curated gift tied to the event. Niagara wine, regional craft, something thoughtful and relevant. Allow 3 to 5 business days to source and ship.	$50-80
Pre-Niagara (after John books the trip)	Dimensional mail kit. A short itinerary tease. Niagara branded items that hint at the trip without spoiling it.	$60-100
Breakup last touch	Final, classy farewell. A high-quality leather-bound notebook with a note. "You built something good."	$70-100

One mail piece in the sequence is the rule. Trigger gifts and a pre-Niagara kit are additive, not part of the cadence. Most A-tier accounts get the opening gift as the planned moment. The other options are there for situations where a different piece would land harder.

Tier B: trigger-based only

100 to 150 middle-tier accounts. No planned gift in the sequence. When a trigger fires, you respond within a few days with a thoughtful, low-cost gesture.

- **Award or milestone,** a handwritten card with a specific, real congratulations. The card can go out same day. A small gift can follow if it makes sense.
- **Engaged with a REVEL post or piece of content,** a printed copy of a relevant piece of REVEL content (REVEL Ed material, a Head Coach story) with a short note.
- **Specific public frustration with their brokerage,** a thoughtful, non-pushy book recommendation with a note. Something useful, not a brochure.

Tier C: no gifting

Lower-tier accounts and unknowns. Save the gifting budget for accounts where it matters. C-tier accounts that respond and engage can be upgraded to B, at which point trigger gifting kicks in.

What works, with examples

What to send	When it lands	Approximate cost
Handwritten card on REVEL stationery	Always. The foundation. Every gift includes one.	$0-3
Business book with a real inscription	First touch, A-tier. The book matters. Choose for the person.	$25-40
Local Niagara craft food and drink	Trigger event, A-tier. Signals where REVEL is from.	$50-80

What to send	When it lands	Approximat e cost
Bound personalized market report	Mid-sequence value drop, A-tier. Pure value, no ask.	$30
Coffee or breakfast gift card with a note	After the first conversation. "On me next time we talk."	$25
Leather-bound notebook, no logo	Breakup or post-Niagara. Tasteful, no swag energy.	$60-90
A handwritten holiday card	December. Every active account. No ask. Just warmth.	$3 each

What does not work

- Anything obviously branded swag. Mugs, pens, water bottles, branded hats.
- Generic printed cards from a corporate program.
- Expensive electronics or items the team leader could easily buy themselves.
- Anything that arrives without a personal note. The note is the point.
- Mass-produced "impressive" gifts. They look mass-produced because they are.

Operational logistics

To make this run, the rep needs the infrastructure. This is a budget item and a process item.

- **Stationery on hand.** REVEL cards, plain notecards, and a quality pen. Always at the rep's desk.
- **Gifting budget.** Suggested $50 to $75 per A-tier account per year, $20 per B-tier trigger event. Around $5,000 per rep per year covers a meaningful program.
- **Vendor relationships.** A local Niagara curator for regional gifts. Reliable shipping. A bookstore that can wrap and ship with a note.
- **Logged in the CRM.** Every gift sent gets logged so coaching and reporting can see what is working. What costs the most. What converts the most.

> **THE NOTE IS MORE IMPORTANT THAN THE GIFT**
> A thoughtful note with a $10 book outperforms a generic gift basket worth $200. The rep's handwriting on the card matters more than the price tag in the box. If the rep cannot write the note, the gift should not go.

Objection Handling on the Front End

The objections an SDR hears in stages 1 to 3 are different from the objections John hears after discovery. These are not concerns about REVEL. These are concerns about whether to have the conversation at all. The job is to keep the door open, not to close anything.

"I AM NOT INTERESTED."

probably had a dozen brokerages call you this year

I am not I am asking if it is worth 20 minutes to understand a model that is genuinely different from what brokerage . If after that you are still not interested, I will close the file. Fair?

"I AM HAPPY AT [THEIR BROKERAGE]."

lad to hear

hat is one thing about your current brokerage you would change if you could? I am genuinely curious, and the answer tells me whether REVEL is even worth us having a conversation about.

"HOW DID YOU GET MY NUMBER?"

Straight answer: I work with team leaders across Ontario and your name comes up because of [the specific reason]. I am not pulling lists at random.

I am happy to tell you why I think REVEL might be worth a conversation, and then you can decide if it is.

"JUST SEND ME AN EMAIL."

I can do that. What would actually be useful for you in that email? The Head Coach economics, the brand support, a specific question about your situation?

I want to send you something worth opening, not the generic pitch

"I HAVE LOOKED AT REVEL BEFORE."

Good. Then you have probably seen the brand and the marketing. What you may not have seen is what the Head Coach model actually does for the economics of an established team like yours.

That is the conversation I would want to have. 20 minutes. If it is not for you after that, no harm done.

"REAL AND EXP GIVE ME BETTER ECONOMICS."

On a pure split, you might be right. The Head Coach model is not about a better split. It is about owning your own office instead of renting someone else's brand.

That is a different conversation. Worth 20 minutes to understand the difference? You can always go back to comparing splits afterward.

"I AM TOO BUSY TO TALK RIGHT NOW."

Totally fair, that is most of the team leaders I talk to.

What is the best way to find a time that respects your schedule? I am happy to work around you. I am thinking 20 minutes, and I will come ready with a specific reason this matters for your team.

THE JOB IS THE NEXT CONVERSATION, NOT THE CLOSE

An SDR's job is never to close a Head Coach on the phone. It is to earn a 20 minute discovery with John. Every objection response should land on the same ask. Twenty minutes. That is the whole game.

Qualifying Through the Conversation

Qualification does not need its own meeting. The research has already done most of the work. By the time a team leader is replying to the outreach, the rep knows enough about their team, their market, and their situation to be largely confident this is a fit. What remains gets confirmed inside the natural outreach conversation, not on a separate screen call.

Why not a separate qualification call

- **The research is the qualification.** An account that has been properly researched and tiered is already qualified on the structural stuff. Team size, production, market, history, motivation hypothesis. The conversation only needs to confirm what the research already strongly suggests.
- **Team leaders are busy.** Asking for two meetings, one to qualify and one with John, doubles the friction. Many will accept the first and ghost the second. Better to earn one well-prepared meeting with the closer than two underwhelming ones.
- **The outreach already surfaces what is needed.** Across an email exchange, a returned call, a few texts, the team leader is already telling the rep what is going on. The rep listens, asks two or three smart follow-up questions in the flow, and gets to confident.
- **One conversation with John is more compelling.** Being screened by an SDR before being allowed to talk to the CGO is not a great experience for an established team leader. Going straight to John signals that REVEL takes them seriously.

What the rep needs to know before booking John

By the time the rep is ready to introduce John, they should have confident answers on five questions. Most come from the research. The rest come from the conversation.

What	Where it comes from
Fit against the IRP	Mostly from research. Team size, production, market, history. The conversation just confirms it.
A real reason this is a conversation	From the outreach exchange. What is actually driving them to engage right now. Not polite curiosity, a real reason.
Decision authority	From the conversation. Are they the one, or is there a partner. One sentence question is enough.
Timeline	From the conversation. Open to a move in 6 to 12 months, or pure info gathering for later.
Reasonable next step	Judgment call. Is this team ready for John's time, or do they need more nurture first.

Questions to weave into the conversation

These are not a scripted intake. They are questions a curious rep asks naturally inside a real exchange, across one or more touches. Used over text, in an email reply, or live on a call when the team leader picks up.

- **Motivation.** "Curious what is got you opening to the idea right now?" or "What is making this an interesting conversation for you?"
- **Decision.** "How is the team built? Are you the main one or running it with someone?" or "Is this a you decision, or is there a partner in the mix?"
- **Timeline.** "If something was right, are you thinking sooner or more research mode?" or "Realistically, what is the window if you were to make a move?"
- **The dealbreaker.** "What would have to be true for you to seriously consider something different?" or "What is the thing your current brokerage would have to fix to keep you?"
- **The future.** "Where do you want the team to be in two years?" or "What does winning look like for you from here?"

The judgment call

After a few meaningful exchanges, the rep makes a call. Book John, or send the team back to nurture for now. The signal to book is straightforward.

- **Book John when,** the rep can write a sharp motivation hypothesis based on what they have learned, can answer the five questions above with confidence, and the team leader is engaged enough that a 30 minute conversation is a small ask, not a leap.
- **Hold for nurture when,** the conversation has been light or polite, the timeline is more than 12 months out, or the motivation hypothesis still feels hazy. Keep the door open, keep the cadence going, and re-engage when something moves.

How to introduce John

Once the rep is confident, the introduction to John is a clean, low pressure offer. The team leader should feel like they are graduating to a real conversation, not getting passed to someone else.

> INTRODUCING JOHN, IN TEXT OR EMAIL
>
> *Based on what you have shared, I think this is worth a real conversation.*
>
> *I would like to set you up with John, our CGO, for 30 minutes. He goes deeper on what the Head Coach model looks like for a team like yours, and you can ask him anything.*
>
> *I will send a calendar invite and a quick brief so John walks in already knowing your situation. What works better for you, next week or the week after?*

If the team leader pushes for the screen first

Occasionally a team leader will want a screen call with the SDR before agreeing to John. That is fine. The rep can do a short 15 minute call to walk them through REVEL at a high level, but the call is not a qualification interrogation. It is an answer to their questions. The rep listens, answers what they can, and offers John for the real conversation.

> THE RESEARCH IS THE QUALIFICATION, THE CONVERSATION IS THE CONFIRMATION
>
> A great SDR enters every exchange 80 percent qualified on the structural stuff because the research has been done well. The conversation closes the last 20 percent naturally. By the time John gets on the call, the team leader has already had a real exchange with REVEL and is ready for the deeper conversation, not to be screened again.

The Handoff to John

When the outreach conversation has matured and the team leader is engaged and qualified, the SDR's job is to introduce John in a state where he can run a great discovery. No starting over. No asking the team leader to repeat themselves. The handoff is what makes the next conversation feel like a continuation.

The SQO gate

A booked discovery only becomes a Sales Qualified Lead (SQL) when it passes two boxes. This is the most important quality control in the whole front end, and it is what the SDR's variable pay is tied to.

Box	What it means	Who confirms it
1. They show	The team leader actually turns up to the booked discovery. A no-show is not an SQL.	Automatic
2. They fit and there is a real reason	After John's discovery, the team passes the IRP and has a genuine reason to consider a move.	John, after discovery

WHY THE GATE MATTERS

Without it, performance to target just rewards calendar stuffing. A rep books an unqualified team, gets paid, and wastes John's time. The gate means the SDR only gets paid for booking real teams. It also keeps the SDR pointed at the right people while John runs the conversation that confirms the fit.

What gets passed to John

Everything the SDR has learned. The team leader should feel like John already knows them when he walks into the discovery, because John does.

- **The account plan, finalized.** Team, history, situation, motivation hypothesis (now confirmed by the outreach conversation), warmth path, channel mix.
- **Every touch logged.** Every email, call, voicemail, LinkedIn DM, gift sent, and what the response was. Visible in the CRM record.
- **Conversation summary.** Key exchanges across email, text, LinkedIn, and any calls. What the team leader said about their situation, motivation, timing, and decision process.
- **The angle that worked.** What got the team leader to say yes to the conversation. John can pull on that thread in discovery.
- **Open questions.** Anything the SDR could not nail down through the outreach and wants John to explore.

Briefing John

Before the discovery, the SDR walks John through the account in 5 to 10 minutes. Live, not by email. Short, structured, and focused on what John needs to know.

BRIEF STRUCTURE

Team and situation: who they are, what they have built, current brokerage, market.

What they said: the top two or three things they shared through the outreach. The frustration, the motivation, the timeline if they have one.

The angle: what got them to say yes. The hook to pull on in discovery.

Open questions: what I could not confirm and want you to dig into.

Risks: anything that might derail the conversation. Decision maker complications, timing concerns, competing offers.

DO NOT BURN A REAL TARGET WITH A PREMATURE HANDOFF

On a finite list, a discovery that goes badly because the team was not ready can cost the account for a year. When in doubt, hold the team in nurture and warm them properly. The SDR is paid on SQLs, not on bookings, so a premature handoff is bad for the rep as well as the company.

PART Five

Nurture and the Long Game

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The Nurture Engine

In a finite market with established operators, not now is the default answer. Most team leaders are not fed up with their brokerage on the day the SDR calls. So most of the list lives in nurture at any given time, and that is exactly as it should be. Nurture is not where dead leads go to die. It is the long game, and it is most of the game.

Who lives here

- Accounts that ran the full sequence and did not bite. Not a no, just not yet.
- Teams that are clearly a fit but explicitly told the rep the timing is wrong.
- Lower tier accounts not yet worth active outreach, sitting in awareness until something changes.

The long game cadence

A nurtured account still hears from REVEL, just less often and with no ask attached. The point is to be the familiar, trusted name when the team leader finally does get fed up. The rep who keeps showing up usefully over a year is the one in the room when that day comes.

Touch	Roughly	What it is
Value drop	Monthly	Something genuinely useful. A market insight, a relevant Head Coach story, a piece of REVEL Ed content. No ask.
Social presence	Ongoing	Keep engaging with their content so the rep stays a familiar face, not a stranger who calls once a quarter.
Light check in	Quarterly	A short, no-pressure note. Still building? Anything changed? Door stays open.
Holiday touch	December	A handwritten card. No pitch. Just warmth. Every active and nurtured account.
Event invite	As they come up	Join the REVELution events, Head Coach storytelling sessions, anything that puts them in the room with real Head Coaches.

Re-engagement triggers

An account jumps from nurture back into the active set the moment something moves. The rep should be alert for any of these.

- A real trigger event fires (key agent left, public frustration, brokerage news, market shift).
- They engage with a REVEL piece of content. Liked a post, replied to a newsletter, attended a virtual event.
- They reply to a check-in or DM with any real signal beyond "thanks."
- A Head Coach flags that they are ready to talk.

- Six months has passed since the last touch and they have moved up in tier.

The awareness layer does real work

This is where REVEL's marketing finally earns its keep on the sales side. The magazine, the podcast, REVEL Ed, and the social presence are not just brand. They are the warming engine for the 200 accounts in the rep's book who are not being actively touched this month. Connecting the content engine to the named list is one of the highest leverage things REVEL can do.

> **NURTURE IS A SYSTEM, NOT A GRAVEYARD**
>
> Every nurtured account has a next touch date and a reason to exist on the list. If an account has no path back to active and no reason to keep, it gets disqualified and removed. A clean list is a working list.

PART Six

Operating Rhythm

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The Daily Rhythm

Through the ramp, there are almost no meetings on the calendar. That is normal and expected. The pipeline has to be filled before it can produce. So early on, nearly all of an SDR's time goes into research, outreach, gifting, and nurture. The job of the daily rhythm is to keep them focused there and not let them drift.

What a focused day looks like

Block	Time	Focus
Morning warm-up	8:30-9:00	Check the active set. Review the day's planned touches. Read any responses, replies, or trigger alerts from overnight.
Call block one	9:00-10:30	Calls. Energy is highest early. Work the active set. Leave voicemails. Push for conversations.
Research and angle	10:30-12:00	Open the next batch of working set accounts. Build account plans. Turn research into angles for first touches.
Lunch	12:00-1:00	Real lunch. Off the screen. Recovery time.
Email and LinkedIn	1:00-2:30	Send the day's first touches, follow-ups, breakups, and DMs. Write live, not from a queue.
Call block two	2:30-4:00	Second call window. Different time of day catches different people. Mix in voicemails for new touches.
Nurture and admin	4:00-5:00	Nurture touches due today. Social engagement on active and nurture accounts. Log every touch from the day. Set tomorrow's active set.

What to watch for in your own day

Through the ramp, when the calendar is light, the day can drift. None of the items below are forbidden, they are just things to notice in your own behaviour and protect against.

- Office socializing that pulls you out of your blocks. The chats are fine. Just keep them short and get back to the work.
- Long internal meetings outside your weekly one on one with John. Push back politely when something can be a quick message instead of a meeting.
- Tinkering with the CRM beyond what it needs. Use it, log in it, do not redesign it.
- Building elaborate spreadsheets the CRM should already hold.
- Internal product talk that does not connect back to a real prospect conversation. If a debate is not changing what you do this week, table it.

Weekly cadence

When	What	Why
Monday morning	Plan the week. Pick the top 3-5 accounts to push hardest on. Set the active wave roster.	Sets the week with intention.
Daily	Work the day's plan. Log everything. Update the CRM by end of day.	The data is only useful if it is current.
Wednesday	Mid-week review. Where is the active wave. Anything sitting cold? Adjust.	Catches drift before it ends the week.
Friday afternoon	Weekly close-out. Update the CRM fully. Note what worked and what did not. Prep Monday.	Walks into the next week ready.
Weekly with John	The one on one. Pipeline, activity, one coaching moment. John sets the day and time.	The accountability layer.

THE EMPTY CALENDAR PROBLEM

Through the ramp, the calendar will be light and that is normal. The pull will be to look busy with anything other than the actual front-end work. Protect against it. Block your day, work the book, and trust that the meetings come once the pipeline has had a few months to fill.

Metrics

Three numbers tell you whether your work is on track. They build on each other in a chain. Activity feeds discoveries. Discoveries feed SQLs. Watching the chain in your own work tells you what to adjust before John has to point it out.

The three numbers you live by

Metric	What it is	What it tells you
Sales activity	Every touch you send. Calls, emails, texts, LinkedIn messages, social engagement, gifts. Logged in the CRM the same day.	The leading indicator. If you keep activity steady, everything else fills in over time. If activity slips, your numbers slip 4 to 6 weeks later.
Discoveries booked	Real discoveries you have set on John's calendar through your outreach. The bridge between your work and qualified pipeline.	Tells you whether your activity is landing on the right targets with the right angle, and whether you are confidently introducing John when the conversation is ready.
SQLs	Discoveries that pass the SQO gate after John runs them. The team showed up and fits the IRP.	Your real output. What your variable pay is tied to. The number that matters most.

Reading your own chain

Through the ramp, your activity is the only number that exists. That is fine. Once the pipeline starts to fill, all three numbers come online and you can read the chain yourself. If one of them looks off, the diagnosis usually lives in one of three places.

What you see	What it usually means	What to do about it
Your activity is light this week	The day got away from you. Research mode without sending. Drift.	Block your calendar. Protect the call and outreach windows. The work compounds when it is consistent.
Activity is healthy, but no discoveries are coming	Your touches are landing in inboxes but the angle or custom is too generic.	Re-read your last ten emails. Could any of them have been sent to a different team? Tighten the angle. Re-do the research on a few A-tier accounts.
Discoveries are happening, but they are not becoming SQLs	You are booking too eagerly. The conversation is not surfacing real fit before John gets involved.	Slow down the introduction. Confirm the motivation hypothesis is sharp before booking John. Re-check the IRP score on accounts you have moved through.

Tracking your own work

Your CRM is the source of truth and the place to log every touch as it happens. Beyond that, two habits make the rep who manages their own numbers stand out from the one who waits to be told.

- **End of each day,** look at your activity. Was the day what you planned, or did it drift? No judgment, just notice.
- **Friday afternoon,** look at your week. Where did time actually go? Which accounts moved? What should next week look like?
- **Every couple of weeks,** look at your chain. Activity, discoveries, SQLs. Spot the soft link before John does and bring it to your one on one with a hypothesis.

ACTIVITY IS BROADER THAN DIALS

On a finite list, a dials-only target pushes you to burn the book with junk outreach. Activity is every channel. Calls, emails, texts, LinkedIn engagement, gifts sent, social comments. They all count, and they all compound.

PART Seven

Getting Up to Speed

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Getting Up to Speed

Your first few months are about building the book, learning the craft, and earning the right to work A-tier accounts. The calendar will be light through the ramp and that is by design. Activity and quality of touches are what matter early, not meetings booked.

What to expect

This is a long-cycle sales motion. Even a perfect first month produces few discoveries because the sequence itself runs 12 weeks. You will be doing the right work and not seeing results in the calendar for a while. That is normal. The pipeline fills, and then it starts producing.

Your job in the ramp is to get the inputs right. The research, the angles, the custom touches, the discipline of logging every exchange. If those are healthy, the meetings come.

What your first weeks will focus on

Phase	What you will spend time on
Week 1, foundation	What REVEL is. How the Head Coach model actually works. How agents and teams think. How REVEL compares to other brokerages and what it genuinely wins on. John leads this part, and you ask every question you have.
Week 1 to 2, the system	This playbook, stage by stage. The CRM. The list. The IRP and tiers. The SQO gate. By the end you should be able to explain the whole process back in your own words.
Week 2, the craft	Research, account planning, customization, sequence mechanics. Live role plays on real names from the book. Reviews of your draft emails and recorded calls.
Week 3, go live on C-tier	Start working real accounts in the lower tier. Expect it to feel messy. The goal is reps and adoption, not perfection. No A-tier accounts yet.
Week 4, earn A-tier access	Once you can run a clean cold call, weave qualifying questions into a real conversation, handle the common objections, and write a custom email and a custom text that pass the rewrite test, you are cleared for A-tier accounts.
Week 5 onward	Working the book. Weekly one on ones with John. Coaching on the patterns that show up in your real work.

The bar before you take on A-tier

A-tier accounts are the most valuable names on your book. Before you take them on, you and John will look at six things together. None of these are a paper test. They are observed in your real work.

- You can run a clean 30 second cold call opener live, with a custom angle, on a real account.
- You can turn a piece of research into a relevant angle in 20 minutes.
- You can handle the most common five objections without losing the call.

- You can explain the SQO gate and the IRP back to John in your own words.
- You can write a first touch email that passes the rewrite test. It could not be sent to any other team without rewriting.
- You have completed at least five full account plans and had them reviewed.

If you are starting before the system is fully built

If you are coming in before the CRM, gifting program, and full playbook are all up and running, the time is not wasted. Pour it into learning the product and the customer. The CRM and the templates will come online around you. The product knowledge has to be in your head before you write your first real email.

- How REVEL actually works. The Head Coach model, the economics, the office structure, REVEL Ed, REVELution.
- How team leaders think. What motivates them, what frustrates them, how they evaluate a move.
- The competitive landscape. Real, eXp, the franchises. The honest comparison. What REVEL actually wins on.
- The market. Ontario by region, the priority markets, where the 500 sit.

> **PRODUCT KNOWLEDGE CANNOT BE SKIPPED**
>
> If you deeply understand the Head Coach offer and how team leaders think, you are already most of the way there. The mechanics of the CRM and the sequence come online around that. The reverse is not true. A rep who knows the mechanics but cannot explain REVEL will never write a custom email worth opening.