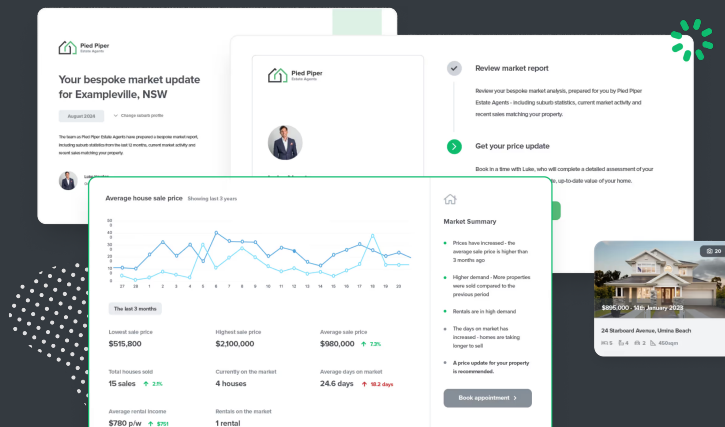




WEBINAR ACTION WORKBOOK



THE SHIFTING MARKET ACTION WORKBOOK

Turn better communication, sharper follow-up and smarter systems into more listings.

Your database becomes your business. Your communication becomes your marketing. Your consistency becomes your competitive advantage.

CHRISTIAN BARTLEY



AARON SHINER

LockedOn Co-founder and real estate coach



CHRISTIAN BARTLEY

Business leader, operator and real estate coach

WORK THE MARKET. DO NOT WAIT FOR IT.

Turn insight into action

This workbook is designed to be used, not admired. Complete it as you watch the replay, then put one system into the market within seven days.

The market does not reward waiting. It rewards agents who communicate, educate and follow through.

1

SCORE IT

Be honest about what is consistent, what is occasional and what is missing.

2

BUILD IT

Use the worksheets to turn each principle into a repeatable process.

3

SCHEDULE IT

Give every action an owner, a deadline and a next review date.

YOUR WORKBOOK INTENTION

THE RESULT I WANT FROM THIS WORKBOOK

ONE LISTING OR PIPELINE PROBLEM I WILL SOLVE

THE DATE I WILL HAVE THE NEW PROCESS RUNNING

WHY THIS WORKS

Christian grew Bellarine Property to an 80% market share in Barwon Heads by making communication and consistency non-negotiable. The tactics in this workbook are simple. The advantage comes from executing them when others stop.

Your shifting-market scorecard

Score each statement from 1 (rarely true) to 5 (consistently true). The purpose is not judgement. It is to show you where the market can expose you.

NO.	BEHAVIOUR	SCORE 1-5
01	I begin each day with proactive priorities, not whatever lands first.	
02	I know which buyers could purchase tomorrow if the right home appeared.	
03	I know which owners are likely to sell within the next 12 months.	
04	Every new seller gets clear expectations before the campaign goes live.	
05	Every new listing receives seven useful seller touchpoints in seven days.	
06	Buyer feedback is recorded and shared as market evidence.	
07	I use engagement data to decide who needs a call next.	
08	Recurring nurture and routine communication run consistently.	

YOUR TOTAL

8-16 EXPOSED 17-28 INCONSISTENT
29-35 COMPETITIVE 36-40 TRUSTED ADVISER

THE ONE BEHAVIOUR THAT WOULD MAKE THE BIGGEST COMMERCIAL DIFFERENCE

Stop asking, 'Who can I list today?'

A shifting market changes the job. The order-taker waits for momentum. The trusted adviser creates clarity, stays close and earns the right to be chosen.

ORDER-TAKER

Waits for the phone to ring

Chases the immediate listing

Reports opinions

Communicates when there is news

TRUSTED ADVISER

Creates useful conversations

Asks, 'Who can I help today?'

Brings back market evidence

Communicates before anxiety builds

BUILD TODAY'S TRUSTED-ADVISER PLAN

FIVE PEOPLE I CAN HELP TODAY

Names and the situation each person is facing

THE MARKET TRUTH I WILL EXPLAIN

Days on market, finance timing, supply, demand or buyer response

THE QUESTION I WILL ASK

What has changed? How are you feeling? What are your plans?

THE NEXT USEFUL STEP I WILL OFFER

A report, a coffee, an updated appraisal or a buyer conversation

An informed seller can make an informed decision. Your job is to create the information before you ask for the decision.

Seven useful touchpoints in seven days

Seller education starts at set-to-sell. Reduce uncertainty early so the campaign evidence can be heard later.

LIKELY ENQUIRY RANGE

LIKELY OPEN-HOME RANGE

SELLER'S TIMING AND MOTIVATION

BACKUP PLAN IF UNSOLD IN EIGHT WEEKS

DAY	RECOMMENDED MESSAGE	YOUR CHANNEL / DETAIL	
DAY 1	Confirm the campaign is live and every link is correct.		☐
DAY 2	Share enquiry levels and reset expectations if needed.		☐
DAY 3	Confirm the open-home plan and early buyer signals.		☐
DAY 4	Share the first enquiry or inspection feedback.		☐
DAY 5	Set realistic attendance expectations before the open.		☐
DAY 6	Report attendance and explain the follow-up timetable.		☐
DAY 7	Summarise market evidence and recommend the next action.		☐

Do not manufacture news. 'We have not received an enquiry yet, and I will update you again tomorrow' is useful when it is honest, expected and part of a clear plan.

Turn buyer feedback into visible evidence

A seller can debate an agent's opinion. It is much harder to debate a consistent pattern in the market's own words.

The newsflash is the vendor report. It is what the market is saying.

CHRISTIAN BARTLEY

VENDOR PORTAL OPERATING CHECKLIST

- ☐ Every attendee is entered
- ☐ Feedback is accurate and useful
- ☐ Harsh comments are summarised respectfully
- ☐ Documents and campaign changes are current
- ☐ The seller knows where to log in
- ☐ Updates are followed by a portal reminder
- ☐ Seller engagement alerts are reviewed

YOUR ENGAGEMENT TRIGGER

SELLER LOGIN TRIGGER

WITHIN THIS WINDOW

CALL BY

THE THREE QUESTIONS FOR EVERY VENDOR MEETING

1

WHAT DID THE MARKET SAY?

2

WHAT DOES THE PATTERN MEAN?

3

WHAT IS MY CLEAR ADVICE?

LOCKEDON IN ACTION

The LockedOn Vendor Portal keeps sellers updated 24/7 with feedback, documents and campaign activity. Login alerts help agents spot when a seller may need a conversation.

Run the five-step listing reset

A stale listing may be overpriced, poorly managed or both. Start with fresh evidence, then reset the controllables and the conversation.

1

RE-APPRAISE

Use the most recent three months of relevant sales and current competition.

2

AUDIT ACTIVITY

Review enquiry, inspections, feedback, offers and days on market.

3

MEET FACE-TO-FACE

Clarify motivation, timing and the seller's backup plan.

4

REFRESH THE CONTROLLABLES

Rework imagery, headline, inspection time, method and price position.

5

RESET COMMUNICATION

Return to daily evidence-led updates and visible campaign reporting.

LISTING RESET WORKSHEET

PROPERTY

DAYS ON MARKET

CURRENT PRICE / METHOD

WHAT THE LAST THREE MONTHS NOW SHOW

ENQUIRY, INSPECTIONS, OFFERS AND FEEDBACK

- ☐ Hero image
- ☐ Headline / copy
- ☐ Private inspections
- ☐ Price position

- ☐ Photography
- ☐ Open-home time
- ☐ Method of sale
- ☐ Seller reporting

MY CLEAR RECOMMENDATION AND THE EVIDENCE SUPPORTING IT

REMEMBER

The property may be well-priced but badly managed. Diagnose before you prescribe.

Have the price conversation with evidence

Control your fear, take responsibility and give clear advice. The property is for sale in competition, not in isolation.

01

OWN THE ORIGINAL ADVICE

Based on the evidence we had at the time, I would have given you the same advice. The live campaign has now given us new evidence.

MAKE IT SPECIFIC TO THIS CAMPAIGN

02

PUT THE EVIDENCE ON THE TABLE

After [days] on market, we have had [enquiries], [inspections] and [offers]. No buyer is currently prepared to act at this position.

MAKE IT SPECIFIC TO THIS CAMPAIGN

03

REFRAME VALUE

At a dramatically lower figure, the phone would ring. We are not suggesting that figure. It proves buyers are not seeing enough value here.

MAKE IT SPECIFIC TO THIS CAMPAIGN

04

GIVE CLEAR ADVICE

You control the decision. My advice is that we move to [position] because [market evidence and competing alternatives].

MAKE IT SPECIFIC TO THIS CAMPAIGN

Accuracy matters. Never imply an offer, buyer position or urgency that does not exist. Adapt the wording to your agency policies and local obligations.

Create demand before Saturday

Portal traffic is not a strategy. Use engagement data to find demonstrated intent, then put a human conversation behind it.

TUE / WED

SEND

Email the right buyer segment with a focused property message.

THURSDAY

TARGET

SMS the people who clicked or engaged repeatedly. Do not blast everyone.

FRIDAY

CALL

Personally invite the most engaged buyers and qualify their position.

PLAN THIS WEEK'S CAMPAIGN

PROPERTY / BUYER SEGMENT

EMAIL SEND DATE AND TIME

EMAIL SUBJECT AND OPENING LINE

WHO QUALIFIES FOR THE THURSDAY FOLLOW-UP

TARGETED SMS

FRIDAY CALL OBJECTIVE AND QUALIFICATION QUESTION

MEASURE THE SIGNAL

DELIVERED

ENGAGED

REPLIES / CALLS

EXPECTED ATTENDEES

Responses are evidence. Silence is evidence too.

LOCKEDON IN ACTION

Use email engagement and targeted bulk communication to concentrate personal follow-up on the buyers showing the strongest intent.

Create a reason to respond

You do not need to invent offers. You do need a clear, truthful moment that invites buyers to declare their level of interest.

MESSAGE STARTER

"We're meeting the owners after Saturday's open home and presenting all current interest in [property]. If it remains under consideration, please let me know before [time]."

CUSTOMISE THE MESSAGE FOR YOUR PROPERTY, MEETING AND DEADLINE

ACCURACY CHECK

- ☐ The seller meeting is real and scheduled
- ☐ The wording says interest, not offers
- ☐ No buyer position is exaggerated
- ☐ Every response is logged in the CRM
- ☐ The seller receives the full result, including silence

TURN THE RESPONSE INTO EVIDENCE

BUYERS WHO REMAIN INTERESTED

THEIR BLOCKERS OR CONDITIONS

WHAT THE SILENCE TELLS US

MY ADVICE TO THE SELLER AFTER THIS EXERCISE

The market is always speaking. Your job is to listen to both the response and the lack of response.

The three lists that run your day

Your CRM holds the database. These lists keep the right people in your line of sight and turn activity into intentional conversations.

1

HOT BUYERS

People who could buy tomorrow if the right property became available.

If the right home appeared tomorrow, are you in a position to buy it?

2

POTENTIAL SELLERS

Owners who are likely to make a move inside the next 12 months.

What are your plans over the next 12 to 18 months?

3

BUYER-SELLER CONVERSIONS

Local owners who want to upgrade, downsize or change their debt position.

If you found the next home, what would need to happen with this one?

HOT BUYERS

NAME	NEXT USEFUL ACTION	BY WHEN

POTENTIAL SELLERS

NAME	NEXT USEFUL ACTION	BY WHEN

BUYER-SELLER CONVERSIONS

NAME	NEXT USEFUL ACTION	BY WHEN

10 before 10. Five after 5.

Technology helps you choose the right call. It does not make the call for you. Protect two windows for deliberate, high-value conversations.

TODAY'S NON-NEGOTIABLE OUTCOME

10 BEFORE 10

MORNING PRIORITY

#	NAME	WHY THIS CALL	RESULT / NEXT STEP
01			
02			
03			
04			
05			
06			
07			
08			
09			
10			

FIVE AFTER 5

EVENING CATCH-UP

#	NAME	WHY THIS CALL	RESULT / NEXT STEP
01			
02			
03			
04			
05			

TOTAL MEANINGFUL CONVERSATIONS

NEW OPPORTUNITIES CREATED

Create appraisal opportunities at scale

A personalised market update gives owners something useful now and gives the agent a reason to call when engagement shows intent.

34

APPRAISAL ENQUIRIES

Christian's first automated CMA send generated 34 appraisal enquiries. Not every enquiry was immediate business. Every one opened a relationship.

1

REPORT SENDS

Personalised market activity reaches the pipeline.

2

OWNER ENGAGES

They open, click or request an appraisal.

3

CRM SURFACES INTENT

Engagement becomes a focused call list.

4

AGENT CALLS

The conversation turns information into opportunity.

BUILD YOUR DIGITAL CMA PLAN

PIPELINE SIZE AND TARGET SEGMENT

CADENCE: MONTHLY, QUARTERLY OR ANOTHER RHYTHM

DATA-CLEANUP RULE BEFORE THE FIRST SEND

ENGAGEMENT THRESHOLD THAT TRIGGERS A CALL

HOW QUICKLY THE AGENT WILL CALL

WHO OWNS SETUP, QUALITY AND FOLLOW-UP

MY CALL OPENER WHEN AN OWNER ENGAGES WITH THE REPORT

LOCKEDON IN ACTION

LockedOn can deliver comprehensive, personalised Digital CMA reports to pipeline sellers on a recurring schedule, then surface engagement and appraisal requests for follow-up.

Automate the repetitive. Protect the relationship.

The goal is not less human contact. It is more time for the moments only a great agent can handle.

AUTOMATE / HAND OFF

- 1 Market reports and Digital CMA nurture
- 2 Just listed, just sold and open-home invitations
- 3 Anniversaries, birthdays and recurring reminders
- 4 Routine campaign updates and task triggers
- 5 Paperwork preparation and coordination

AGENT OWNS

- 1 Buyer qualification and personal follow-up
- 2 Seller expectation and campaign meetings
- 3 Pricing advice and difficult conversations
- 4 Appraisals, inspections and negotiation
- 5 Relationship building and local market education

YOUR AUTOMATION AUDIT

ACTIVITY	WHO DOES IT NOW?	AUTOMATE / DELEGATE / KEEP	TIME RETURNED

THE FIRST WORKFLOW I WILL AUTOMATE

THE RELATIONSHIP WORK I WILL DO WITH THE TIME RETURNED

LOCKEDON IN ACTION

Automation, triggers and pre-built plans keep routine client and property communication moving so agents can focus on listing, selling and negotiating.

Your seven-day implementation sprint

Choose progress over perfection. One disciplined week is enough to prove which systems create better conversations and better opportunities.

WHEN	FOCUS	ACTION	DONE / RESULT
DAY 1	Score the gaps	Complete the scorecard and pull your three priority lists.	
DAY 2	Set expectations	Build the seven-touchpoint plan for every fresh listing.	
DAY 3	Make evidence visible	Clean up buyer feedback and establish your Vendor Portal routine.	
DAY 4	Create buyer traffic	Run the email, targeted SMS and call sequence.	
DAY 5	Call with intent	Complete 10 before 10 and five after 5.	
DAY 6	Nurture at scale	Define your Digital CMA audience, cadence and follow-up rule.	
DAY 7	Lock the system	Review results, assign ownership and schedule the next cycle.	

BEFORE YOU START: IS YOUR CRM READY TO HELP?

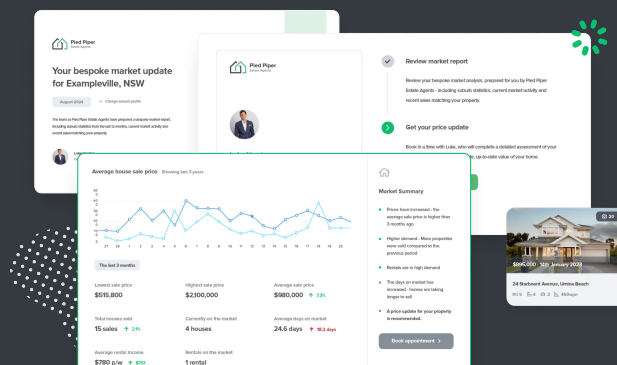
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|--|---|---|---|
| ☐ Easy enough that the entire team actually uses it | ☒ YES | ☐ Automates recurring market communication | ☒ YES |
| ☐ Shows who is engaging and needs a call | ☒ YES | ☐ Gives sellers 24/7 visibility of campaign feedback | ☒ YES |
| ☐ Sends personalised Digital CMA reports at scale | ☒ YES | ☐ Keeps client, property, automation and marketing work together | ☒ YES |

YOUR SEVEN-DAY COMMITMENT

If the system is hard to use, hard to adopt or hard to act on, it is not earning its place.



READY FOR MORE?



SEE WHAT YOUR CRM SHOULD BE DOING FOR YOU.

You've got the playbook. Now make it easier to execute. LockedOn brings CRM, automation and marketing into one easy-to-use platform built for real estate.

01

DIGITAL CMA

Personalised market updates delivered to your pipeline on a recurring schedule.

02

VENDOR PORTAL

24/7 campaign feedback and seller engagement signals that prompt better calls.

03

AUTOMATION + TRIGGERS

Routine nurture and follow-up handled so your agents can list, sell and negotiate.

READY TO SEE LOCKEDON IN ACTION?

BOOK YOUR LOCKEDON DEMO

95+ five-star Google reviews | Trusted by thousands of top-performing agents



SCAN TO BOOK
YOUR 1-ON-1 DEMO

LIST. SELL. REPEAT.

GET.LOCKEDON.COM