Getting Next Year Into Gear

WEEKLY SOP · BOOK JANUARY AND FEBRUARY APPOINTMENTS NOW

What this is and why

Most agents go quiet in November and December, then scramble in January. This flips it. Every week you text your sphere and your hot leads with a message that picks up exactly where you last left off, and you book your January and February appointments before everyone else wakes up. Claude does the reading and the drafting. You approve every text before anything goes out.

What you need

- **Claude** with **Claude in Chrome** turned on. *Why: Claude reads your Follow Up Boss through your own browser.*
- **Follow Up Boss** open and logged in. *Why: every text is sent and logged from FUB, never your phone, so your history stays in one place.*
- About **45 minutes**, once a week.

The steps

1. **Paste the prompt below** into a new Claude chat. *Why: it gives Claude the whole job and the rules in one shot.*
2. **Claude pulls your list** and reads each person's last texts, calls and notes. *Why: a text that remembers your last conversation gets answered. A generic blast gets ignored.*
3. **You get one numbered list**: the person, a one line recap, and the text.
4. **Reply by number**, like "1 good, 2 add thanks for last month, 3 skip." *Why: you stay in control and it takes seconds per person.*
5. **Claude sends from FUB** and adds a note to each person. *Why: the note means nobody on the team double texts them.*
6. **Answer replies the same day.** Paste them back to Claude for drafts if you want. *Why: the replies are where the appointments come from.*

The two starter texts

> **Sphere:** Hey NAME! Hope the family's doing great. I'm already mapping out January plans for anyone thinking about a move in 2027. If that's you or anyone you know, just tell me January or February and I'll save you a spot!

> **Hot leads:** Hey NAME! Wanted to see where your head's at with selling. If spring is looking like the move, let's get together in January or February so you're ready to go. Let me know which month's better!

These are starting points. Claude rewrites each one around your last conversation with that person.

The prompt · paste this into Claude

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GETTING NEXT YEAR INTO GEAR · weekly outreach
You're my outreach assistant. Today we're texting my people to set up January and February
appointments. Use Claude in Chrome with my Follow Up Boss (I'm already logged in).

THIS WEEK'S TEXTS (start from these, then personalize for each person):
Sphere: "Hey! Hope the family's doing great. I'm already mapping out January plans for anyone
thinking about a move in 2027. If that's you or anyone you know, just tell me January or
February and I'll save you a spot!"
Leads: "Hey! Wanted to see where your head's at with selling. If spring is looking like the
move, let's get together in January or February so you're ready to go. Let me know which
month's better!"

1. Build my list from FUB, only people assigned to me: my Hot leads, and my Sphere contacts
whose last names start with these letters this week: ____. Skip sphere people I've texted in
the last 30 days and leads I've texted in the last 7 days.
2. For each person, open their FUB profile and read the most recent texts, calls and notes
before writing anything.
3. Start from this week's text and adjust it so it picks up where we last left off. Use their
first name. Rules: warm and low pressure, under 300 characters, use contractions, no dashes, no
placeholders, never ask something they already answered, never say "circle back."
4. Show me ONE numbered list: number, name, one line on our last conversation, then the text.
Group it by Hot, then Sphere, numbered straight through with no gaps. Don't send anything yet.
5. I'll reply like "1 good, 2 add thanks for last month, 3 skip." Make my edits, show me only
the ones you changed, then send the approved texts from FUB (never my phone).
6. After each send, add a FUB note: "Next Year Into Gear text sent" with today's date. When
you're done, tell me who got texted, who I skipped, and who had no mobile number.
Never email anyone on Likely To List or Mojo lists. Text only.
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Homework: run this once before December 8 and bring one reply to the meeting.

My Weekly Checklist

GETTING NEXT YEAR INTO GEAR · KEEP THIS BY YOUR DESK

Why a paper copy: it's easy to skip a week when nobody's watching. Check the boxes, and bring this sheet to the December 8 meeting.

Week of	Letters	Ran the prompt	Texts sent	Replies	Answered same day	Appts booked
Nov 9		☐			☐	
Nov 16		☐			☐	
Nov 23		☐			☐	
Nov 30		☐			☐	
Dec 7		☐			☐	
Dec 14		☐			☐	
Dec 21		☐			☐	
Dec 28		☐			☐	

Every week

☐ Pick this week's last name letters for your sphere. *Why: a few letters a week covers everyone without burning anyone out.*

☐ Run the prompt and approve every text by number. *Why: nothing goes out that you didn't read.*

☐ Answer every reply the same day. *Why: replies go cold fast, and that's where the appointments come from.*

☐ Put any appointment on your calendar and in FUB. *Why: if it's not in FUB, the team can't see it.*

☐ Post your win in Slack #team-chat. *Why: wins are contagious, and it keeps all of us moving.*

My January and February appointments

Name	Buying or selling	Date