

HRE GROUP

THE DATABASE GOLDMINE AUDIT

Find hidden commission opportunities inside the relationships already in your phone.

A practical 30-minute audit for real estate agents

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This workbook helps you identify the people most likely to produce a real conversation, a referral, a buyer opportunity, or a future listing - and then gives you the structure to follow through.

How to use

Set an 11-minute timer. Open your phone contacts. Score every name using the rubric below. Stop at 11 minutes. You will be shocked at what surfaces.

The 4-Question Scoring Rubric

For each contact, answer four yes/no questions. Score one point per YES.

1. Have I had a real-life interaction with this person in the last 24 months? (call, text, event, transaction, meaningful social interaction)
2. Do I know - or could I determine within 60 seconds - their current housing situation? (own/rent, number of kids, life stage)
3. Are they within a plausible move-trigger window in the next 12 months? (marriage, divorce, baby, promotion, retirement, empty nest, equity, lease ending, relocation)
4. Would they recognize my name and feel comfortable hearing from me right now?

The Grade Key

	Grade	What it means	Next action
A	Goldmine (4 points)	Strong relationship and plausible opportunity	Call within 48 hours. These are your hidden opportunities.
B	Warm (2-3 points)	Known relationship but less immediate	Text plus handwritten note this week. Add to nurture.
C	Cold (0-1 points)	Little current relationship or context	Drop into a quarterly value email. Do not waste a call.
X	Remove	No memory, wrong number, deceased, or do-not-contact	Remove or suppress the record.

The 11-Minute Procedure

Time	What to do
Minute 0-1	Open Contacts. Sort A-Z.
Minute 1-9	Speed-score. Thumb-tap A, B, C, or X. Do not think - gut-react.
Minute 9-10	Tally your A-list. Target: 20-40 contacts.
Minute 10-11	Star the top 10 and copy them into a new Goldmine A-List group.

Your Results Box

Result	Count
Total contacts reviewed	
A-list (Goldmine)	
B-list (Warm)	
C-list (Cold)	
X - Remove	

Top 10 to Call This Week

1.		6.	
2.		7.	
3.		8.	
4.		9.	
5.		10.	

Pro Tip

At an illustrative 1-in-12 sphere conversion, 20 A-list contacts equal approximately 1.6 transactions in the next 90 days. If your average GCI is \$9,000, that is \$14,400 in potential opportunity sitting in your phone right now. Use your own results and average GCI; this is an example, not a guarantee.

Estimate the Opportunity

Illustrative example	Your numbers
A-list contacts: 20	A-list contacts: _____
Illustrative transactions: 1.6	Estimated transactions: _____
Average GCI: \$9,000	Average GCI: \$_____
Potential opportunity: \$14,400	Potential opportunity: \$_____

Post-NAR 2026 compliant

All scripts are post-NAR 2026 compliant. They avoid fixed or standard commission language, compensation promises, and improper agency claims. Replace bracketed placeholders before sending.

Text Messages

T1 The Curiosity Re-Open

Hey [First Name], random thought. Was driving past [neighborhood/landmark you know they are tied to] and you popped into my head.

How is the [house / condo / family] treating you these days?

T2 The Equity Tease

[First Name]. Quick one. Values shifted again last quarter, and I just pulled what your place could realistically sell for in today's market.

Mind if I send the 1-page snapshot? No pressure, no pitch.

T3 The Anniversary Anchor

[First Name], crazy. Just realized you closed on [Address] [X] years ago this month. If you are ever curious what it is worth today, say the word. Either way, hope life is good.

Voicemails

VM1 The Friendly Drive-By (under 20 seconds)

Hey [First], it is [Your Name] with [Brokerage]. No agenda. Just wanted to hear your voice and check in.

The market is doing weird stuff, and you crossed my mind. Shoot me a text when you have a second. Talk soon.

VM2 The Specific Question

[First]. Quick voicemail. I have a buyer specifically asking about homes in [your neighborhood], and I thought of you.

Not asking you to sell. Just wanted to know if you have heard of anyone nearby even thinking about a move. Text me back. Thanks.

Video DMs

V1 The 30-Second Personal Hello

Hey [First Name]. [Your Name] here. Saw [specific reference: their kid's graduation post / vacation pictures / job change] and just wanted to say congrats.

Real estate is wild right now. If anything I can ever help with, I am one text away. Take care.

V2 The Market Snapshot

[First], recorded this just for you. I pulled the five most recent sales near your home, and the estimated value range has moved [up/down] [\$XX,XXX] in the last 12 months.

Want me to send the full breakdown? Reply yes or no. Either way, hope you are doing well.

Emails

E1 The Re-Engagement

Subject: Did I lose your number?

Hey [First Name], realized it has been a minute. Not writing to sell you anything. I made it a goal to actually stay in touch with the people I care about, and you are on that list.

Two things I can do for you quickly if useful:

1. Send your home's current automated estimate versus a real MLS-based value range.
2. Tell you what is actually selling in [Neighborhood] right now.

Reply with 1, 2, or neither, and I will handle it.

- [Your Name]

E2 The Referral Ask

Subject: A weird favor

[First Name], quick favor that costs you nothing. I am growing my business by working with people connected to clients and friends I already value. You are one of them.

If someone you know mentions buying, selling, investing, or relocating, would you mind connecting us? I will handle the conversation respectfully and without pressure.

Appreciate you. Always.

[Your Name]

Emails

E3 The Cancel Zillow Email

Subject: I just fired Zillow

Hey [First Name], real talk. I no longer use Zillow advertising. I would rather invest my money, time, and energy in serving the people I already know than chase strangers online.

So here is my new commitment: one helpful, no-pitch email per quarter. First one will be your home's MLS-based value range compared with the automated estimates online. Want it?

Reply YES.

[Your Name]

Direct Messages

DM1 Instagram (after liking 2-3 of their recent posts)

[First Name]! That [photo/post reference]. Incredible. Quick non-pitchy hello from your friendly Realtor. Hope the family is good.

If you are ever curious what your home is worth in this market, I will send a free snapshot. Otherwise, just here to say hello.

DM2 LinkedIn (if they had a job change)

Congrats on the new role at [Company], [First Name]. Huge. If the new job ever leads to a move, renovation, or investment-property conversation, I am your real estate person.

Either way. Proud of you.

How to use the scripts

Do not send all of these to one person. Choose the channel and message that best fit the relationship. When someone responds, stop the sequence and have a normal conversation.

The cadence is the bridge - not the goal

Apply this cadence to every appropriate A-list contact. Document each completed touch in your CRM. If they engage at any touch, stop the cadence and move into a real conversation.

The 7-Touch Schedule

Day	Touch	Method	Script	Goal
1 Mon	#1	Phone Call	Live or VM1	Reconnect; learn the life update.
2 Tue	#2	Personal Text	T1	Soft re-entry into their phone.
4 Thu	#3	Video DM	V1	Pattern interrupt. Face and voice.
6 Sat	#4	Handwritten Note	Handwrite it	Thinking of you. Hope life is great.
9 Tue	#5	Email	E1	Give a clear yes-or-no choice.
11 Thu	#6	Social DM	DM1 or DM2	Show up where they already are.
14 Sun	#7	Phone Call	Live ask	Value snapshot? Referral? Coffee? Convert the warmed-up lead.

Expected Results (Based on 30 A-List Contacts)

Measure	Illustrative example	Your result
30 contacts x 7 touches	210 total touchpoints	_____
Response rate after multi-channel touches	38% to 55%	_____ %
Expected booked conversations	11 to 16	_____
Expected CMAs or value reviews	5 to 8	_____
Expected listing or buyer appointments (30 days)	2 to 4	_____

CRM rule

Every meaningful conversation should end with the next task being created in BoldTrail or your CRM. Record what changed, choose the next action, assign a due date, and do not close the contact record until the next step exists.

Build this in the companion workbook

The accompanying spreadsheet already contains the tabs, formulas, examples, and tracker. Replace the example inputs with your own numbers.

Tab 1 - Inputs

Cell	Field	Default / Example
B2	Total contacts in your phone	980
B3	A-list count (from worksheet)	30
B4	B-list count	140
B5	C-list count	810
B6	Average sale price in your market	\$450,000
B7	Average commission per side	2.5%
B8	Brokerage split kept by you	80%
B9	Current Zillow / portal monthly spend	\$1,500

Tab 2 - Projections

Calculation	Formula	Example (90 Days)
Expected A-list closings	=B3 x 8%	2.4 closings
Expected B-list closings	=B4 x 2%	2.8 closings
Total expected closings	=SUM(above)	5.2 closings
Gross commission per deal	=B6 x B7	\$11,250
Net commission per deal	=Gross x B8	\$9,000
90-Day Projected GCI	=Closings x Net Commission	\$46,800
Annual portal spend	=B9 x 12	\$18,000
Total Found Money	=Projected GCI + Annual Spend	\$64,800

A-list: 30 contacts -> 2.4 expected closings
B-list: 140 contacts -> 2.8 expected closings

\$450,000 average sale x 2.5% x 80% = \$9,000 net per deal

90-Day Projected GCI: \$46,800

Portal Spend Eliminated: +\$18,000

TOTAL FOUND MONEY: \$64,800

Read this correctly

This page compares potential database-generated opportunity with money no longer spent buying internet leads. It is a planning example, not a forecast or promise. Replace every assumption with your own numbers.

Your Numbers

90-Day Projected GCI	\$ _____
Annual Portal Spend Avoided	\$ _____
TOTAL FOUND MONEY	\$ _____

Track the work, not just the idea.

Mark each completed touch, record the actual outcome, and create the next CRM task before moving on.

[illegible]

Minimum notes to keep

Relationship context, what changed, last completed touch, next action and due date, conversation outcome, referral or appointment status, and any do-not-contact or consent notes.

Do not confuse activity with progress

A hundred touches with no context are less valuable than ten relevant conversations with clear next steps.

Turn the audit into a repeatable CRM habit.

Week 1 - Audit and organize

- Complete the A/B/C audit and clean bad records.
- Create the A-list and B-list.
- In BoldTrail or your CRM, create the first follow-up task for every A-list contact.
- Choose the first 10 people and begin.

Week 2 - Execute

- Complete the scheduled calls, texts, video messages, notes, and emails.
- Record what changed in each person's life or housing situation.
- Before closing the contact record, create the next task with a due date.

Week 3 - Add value

- Send value snapshots, CMAs, neighborhood updates, or useful introductions.
- Ask for referrals naturally when the relationship supports it.
- Continue recording outcomes and scheduling the next CRM task.

Week 4 - Review and repeat

- Review completed and overdue tasks.
- Review responses, conversations, value requests, appointments, and referrals.
- Start the next cycle using what the numbers taught you.

If you actually run this audit
not just download it

you will find money in your phone this week.

That is not a sales line. That is math.

The agents who win are not always the ones spending the most on internet leads. They are the ones who treat their database like a real business. They show up. They follow up. They document the conversation. They create the next task. Then they repeat the process.

I am here to help

If this workbook helps you uncover opportunities in your database, I would love to hear about it. If you need help implementing the process inside BoldTrail or another CRM, or thinking through the next step, I am happy to help.