

GEOGRAPHIC FARMING 2.0

SIMPLE FARM CRM BLUEPRINT

A practical system for turning neighborhood interactions into organized relationships, consistent follow-up, and future seller opportunities.

THE CRM RULE: Every interaction goes somewhere.

If someone attends an event, scans a QR code, responds to mail, visits an open house, asks for a home value, or simply has a real conversation with you, capture the relationship and give yourself a reason to follow up.

THE SIMPLE MODEL

INTERACTION -> CRM -> FOLLOW-UP -> RELATIONSHIP -> OPPORTUNITY

1. TAGGING ARCHITECTURE

Keep the structure simple. The goal is to make it easy to answer three questions: Where did this person come from? What is their relationship to the farm? What should happen next?

Tag Type	Example	Purpose
Primary Farm Tag	FARM Cedar Grove	Identifies the neighborhood / geographic farm
Source Tag	SOURCE Pumpkin Event	Shows how the contact entered your database
Relationship Tag	REL Homeowner	Describes their connection to the farm
Opportunity Tag	OPP Future Seller	Flags a possible business opportunity
Interest Tag	INT Downsizing	Captures a known topic or need from an actual conversation

Recommended Relationship Tags

- REL | Homeowner
- REL | Seller Prospect
- REL | Past Client
- REL | Event Attendee
- REL | Open House Visitor
- REL | New Resident
- REL | Investor / Absentee Owner
- REL | Local Business
- REL | Community Partner

Keep interests factual

Only apply a need or interest tag when the person has actually told you something relevant. For example, if a homeowner says they may downsize next year, 'INT | Downsizing' is useful. Do not use AI to guess sensitive or personal facts about individual homeowners.

2. FARM RELATIONSHIP STAGES

You do not need every farm homeowner in a traditional sales pipeline. A relationship stage is usually more useful until someone shows real intent.

Stage	What It Means	Next Action
1. Known Homeowner	You know who they are, but no relationship yet.	Provide useful neighborhood value; avoid aggressive follow-up.
2. Engaged	Opened, replied, attended, scanned, commented, or had a conversation.	Follow up based on what they engaged with.
3. Relationship	You have had meaningful two-way contact.	Stay useful and personal; document context.
4. Future Opportunity	They have expressed a possible move, timing, or housing problem.	Create a task and appropriate nurture plan.
5. Active Opportunity	They are considering a move and want help.	Move into your normal buyer/seller opportunity pipeline.
6. Client / Closed	You are working together or have closed.	Continue farm relationship and ask for introductions/referrals as appropriate.

Key rule: Do not move someone into a seller pipeline because they clicked an email. Engagement is not intent.

3. WHAT HAPPENS AFTER EACH FARM INTERACTION?

EVENT ATTENDEE

1	Add FARM tag
2	Add event source tag
3	Send thank-you within 24 hours
4	Add useful event follow-up / photos / resource
5	Create personal task for strong conversations
6	Return to normal farm nurture

OPEN HOUSE / LISTING NEIGHBOR

1	Add FARM tag
2	Add source tag
3	Note property / event context
4	Send relevant neighborhood follow-up
5	Create task only if they expressed a real need
6	Continue normal farm touches

HOME VALUE / MARKET REPORT REQUEST

1	Add FARM tag
2	Add source tag
3	Deliver requested information quickly
4	Ask one useful follow-up question
5	If intent exists, move to Future Opportunity
6	If not, keep in homeowner nurture

RESPONSE TO MAIL / QR CODE

1	Identify campaign source
2	Deliver promised resource
3	Track what they requested
4	Use one human follow-up when appropriate
5	Do not immediately start a heavy sales sequence

NEW RESIDENT

1	Add FARM + New Resident tags
2	Send welcome note / local guide
3	Introduce yourself as a neighborhood resource
4	Invite to upcoming community event
5	Add to normal neighborhood nurture

LOCAL BUSINESS / COMMUNITY PARTNER

1	Add FARM + Local Business tag
2	Document relationship and partnership
3	Thank / promote when appropriate
4	Create annual or quarterly check-in
5	Look for genuine community collaboration

4. SIMPLE FARM NURTURE CADENCE

This is not a rigid rule. It is a simple default that keeps the database useful without turning every contact into an automated sales assault.

Frequency	Touch	Example
Monthly	Useful farm communication	Market update, homeowner education, neighborhood resource
Quarterly	More personal value touch	Home-value update, note, call, seasonal guide
Event-based	Invitation + follow-up	Community event, local resource, open house
Behavior-based	Human follow-up	Reply, form request, conversation, event interaction
Annually	Relationship / data cleanup	Confirm tags, notes, source, opportunities, bad data

A simple 90-day follow-up example

Day 0	Deliver what they requested / thank them
Day 2-3	Personal follow-up if appropriate
Day 14	Useful neighborhood / homeowner information
Day 30	Market or community touch
Day 60	Personal or value-based check-in
Day 90	Review relationship and decide next appropriate cadence

Important: If someone tells you they are not interested or asks you not to contact them, respect that preference and update your system accordingly.

5. WHAT TO STORE IN THE CRM

Field	Why It Matters
Name + contact info	Basic relationship record
Property address	Connects the person to the farm / household
Farm name	Allows neighborhood-level filtering
Source	Shows which farming activities create relationships
Relationship stage	Prevents every contact from being treated like a hot lead
Last meaningful interaction	Helps prevent contacts from going cold
Known housing need / timing	Only when directly shared by the homeowner
Next task / follow-up date	Turns information into action
Notes	Context: family-safe, professional, useful facts from actual conversations

Good CRM note example

"Met at June ice cream social. Homeowner has lived in neighborhood 12 years. Asked about whether updating the kitchen would matter if they sold in the next few years. Sent prep guide. Follow up in September."

Avoid vague notes like "good lead" or intrusive/speculative notes about personal circumstances you do not actually know.

6. WHAT TO TRACK

Do not judge your farm only by closed listings. Farming is a relationship and mindshare strategy, so track the leading indicators too.

Relationship Metrics	Business Metrics
Farm contacts in CRM	Listing appointments
New contacts added	Listings taken
Meaningful homeowner conversations	Buyer opportunities
Event registrations / attendance	Transactions closed
Replies / requests for information	GCI generated
Home-value / market report requests	Farm market share
Referral / introduction conversations	Cost per transaction

Quarterly CRM cleanup checklist

- Merge duplicates.
- Remove or correct bad contact information.
- Confirm every farm contact has the correct farm tag.
- Review future opportunities and overdue tasks.
- Review contacts with no meaningful interaction in the last 6-12 months.
- Check which sources produced real conversations, not just names.
- Review opt-outs / contact preferences.

7. SIMPLE AUTOMATION BLUEPRINT

Automation should support relationships, not impersonate one. Use automation for delivery, reminders, organization, and consistent value. Use yourself for conversations.

Trigger	Automation Can Do	Human Should Do
Event registration	Confirmation, reminders, calendar info, tag contact	Welcome them at event; follow up on meaningful conversations
Resource request	Deliver guide, tag source, create task	Respond personally if they ask a question
Home value request	Confirm request, create task, send basic info	Review value / context and speak with homeowner
Open house sign-in	Thank-you, source tag, basic property follow-up	Call when there is genuine interest or need
Future seller identified	Create task, add appropriate nurture	Have the actual planning conversation

For GoHighLevel / similar CRMs

A simple setup can use tags, smart lists, workflows, tasks, and one dedicated farm pipeline for actual opportunities. You do not need a separate pipeline stage for every homeowner in the neighborhood.

8. AI CRM BUILDER PROMPT

You are helping a real estate agent create a simple CRM system for a geographic farm.

FARM: [NEIGHBORHOOD]

CRM PLATFORM: [GHL / FOLLOW UP BOSS / OTHER]

NUMBER OF FARM CONTACTS: [COUNT]

CURRENT SOURCES: [EVENTS / OPEN HOUSES / MAIL / HOME VALUES / PERSONAL CONTACT / OTHER]

PRIMARY GOAL: [LISTINGS / RELATIONSHIPS / COMMUNITY / MIX]

Create a simple CRM blueprint with:

1. Primary farm tag
2. Recommended source tags
3. Recommended relationship tags
4. Relationship stages
5. Required contact fields
6. Follow-up tasks for each source
7. A simple 90-day nurture sequence
8. Which actions should be automated
9. Which actions should stay human
10. Quarterly cleanup checklist
11. Metrics to review every quarter

Rules:

- Keep the structure simple enough for one agent to maintain
- Do not treat every homeowner like a hot lead
- Do not infer personal or sensitive homeowner facts
- Use automation for organization and delivery, not fake relationship-building
- Recommend fewer high-quality workflows rather than excessive automation

THE GOAL IS NOT A BIGGER DATABASE.

The goal is a database that helps you remember people, follow up appropriately, and turn consistent neighborhood visibility into actual relationships.

Every interaction goes somewhere. Every real relationship gets a next step.