Premium Bonus Add-Ons for Playbook #008

Five Niches From PB #008:

- Real Estate
- Clinics & Wellness
- Coaches & Consultants
- Law Firms (non-advisory, marketing only)
- Recruiting / HR

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1) Niche Template Vault

(Trust Page + Nurture + FAQ + Scripts)

You can treat this as a **master vault** and duplicate per niche.

A. Trust Page Template (1 Page)

Title / Hero

Headline:
"{{Result}} for {{Audience}} in {{Location}} - with a clear plan and real support."

Subheadline:

"We help {{specific audience}} go from {{pain}} to {{outcome}} using {{method/approach}} that's proven, transparent, and tailored to you."

Section 1 – Who We Help

Who We're Good Fit For

- You are a {{role: first-time buyer / busy parent / founder / etc.}}
- You're dealing with {{pain/situation}}
- You value {{things they care about: clarity, speed, thoroughness, honesty}}
- You want {{clear process / expert guidance / no games / etc.}}

Section 2 – What We Actually Do

What We Help You With

- {{Service 1}} – short benefit sentence
- {{Service 2}} – short benefit sentence
- {{Service 3}} – short benefit sentence

In plain language:

"If you're facing {{situation/problem}}, our job is to help you understand your options, choose a path that fits you, and support you through each step."

Section 3 – How It Works (3 Steps)

How It Works

1. **Quick Intro Call / Intake** – We listen, clarify, and see if we're a fit.

2. **Plan & Next Steps** – We outline options, costs, and timelines.
3. **Implementation / Service** – We execute, keep you in the loop, and adjust as needed.

Section 4 – Why Trust Us

Why People Choose Us

- {{X}}+ {{clients / transactions / projects}}
- {{Y}} years of experience in {{niche/market}}
- Clear communication: “no surprises” is a rule
- Processes designed for {{safety / speed / clarity / family-friendly / compliance}}

Add 2–3 short testimonials or anonymized story snippets here.

Section 5 – What Happens Next

What Happens When You Reach Out

- You fill out a short form or book a call.
- We review your situation.
- You get clear options, not pressure.

CTA:
“If you’re dealing with {{pain/situation}}, let’s figure out your next clear step.”
→ ***Button:*** *“Book a Call” / “Request a Consultation” / “Get a Plan”*

B. 7-Touch Nurture Sequence Template (Email / SMS)

You can adapt this per niche.

1. **Welcome & Expectations**
   - Subject: “What to expect from us”
   - Content: who you serve, what you’ll send, how you help, simple CTA (reply with a question / book a call).
2. **“How It Works” Breakdown**
   - Explain the process in 3–5 steps.
   - Remove fear by making steps concrete.
   - CTA: see the process page or book.
3. **Common Mistakes & How to Avoid Them**
   - 3–5 niche-specific mistakes.
   - Position you as guide, not scolder.
   - CTA: “If you’re dealing with any of these, hit reply or book a chat.”
4. **Short Case Story / Mini Case Study**
   - Before → after (respecting privacy).
   - Emphasize process, not miracle.
   - CTA: “If this sounds familiar, here’s how to start…”
5. **FAQ Highlight / Objection Handling**
   - Answer 3 big questions or fears.

    - CTA: “If this is your situation, let’s talk.”

6. **Low-Pressure Invitation**
    - “If you’re not ready, that’s okay - here’s a resource / checklist.”
    - Soft CTA + resource download.

7. **Close-the-Loop & Next Step**
    - “If this isn’t the right time, no problem.
      If it is, here’s the simplest next step…”
    - CTA: book / apply / request quote.

C. FAQ Cluster Template

Use this structure per niche:

- **Process FAQs**
    - “What happens first?”
    - “How long does this take?”
    - “What do I need to prepare?”
- **Pricing FAQs**
    - “How do you price your services?”
    - “Do you offer payment plans / retainers / packages?”
    - “When do I pay?”

- **Outcome / Expectations FAQs**
    - “What results can I reasonably expect?”
    - “What can’t you promise?”
    - “What happens if it doesn’t work?”
- **Policy FAQs**
    - Cancellations / rescheduling
    - Boundaries / communication
    - Privacy / confidentiality basics
- **Next Steps FAQs**
    - “How do I start?”
    - “Do I have to commit right away?”
    - “What if I’m not sure I’m ready?”

D. Script Vault (Short Script Types)

Give yourself variants per niche:

1. **Intro Call Opener (2–3 sentences)**
2. **“Not Ready Yet” Script**
3. **Follow-Up After No Response**
4. **“We’re Not a Fit” Script**

5. **“Here’s How to Work With Us” Overview Script**

Example (generic):

Intro Call Opener

“Hey {{name}}, glad we could connect. This call is just to understand what you’re dealing with, answer your questions, and see if we’re a good fit. I’ll ask a few simple questions, then we’ll talk through options. Sound good?”

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2) Five Niche Prompt Packs (One Per Niche)

Use these in ChatGPT/Claude; you can brand them as “Niche Prompt Pack Cards.”

A. Real Estate Prompt Pack

1. **Listing Description & Story Version**

“You are a real estate copywriter.
Turn this property info into:

1. MLS-style description (neutral, compliant)
2. Lifestyle ‘story’ version
3. 5 social hooks
4. 7-slide carousel copy

5. 30-second video script
   Audience: {{first-time buyers / move-up / investors}}
   Property details: [paste]"

2. **Buyer Nurture Sequence**

"Write a 7-email nurture for home buyers in {{city}} who inquired but haven't bought yet.
Include: process education, common mistakes, local insights, and an invitation to a call. Tone: calm, local, helpful."

3. **Seller Nurture Sequence**

"Write a 7-email nurture sequence for homeowners thinking about selling in {{city}}.
Focus on: timeline, preparation, pricing, staging basics, and what happens at each step."

4. **Weekly Market Update**

"Create a weekly real estate market update for {{city/neighborhood}}.
Output:

- 5 bullets (what changed)
- 1 short paragraph (what it means)
- 3 CTA options (ask a question, get a value estimate, book a consult)."

5. **Neighborhood Snapshot**

"Write a 'neighborhood spotlight' post for {{area}} in {{city}}. Include: who it's good for, amenities, vibe, and why buyers like it."

B. Clinics & Wellness Prompt Pack

1. **Intake Flow Builder**

"Create an intake flow for a {{clinic type}} clinic.
Output:

1. Friendly intro text
2. 10 intake questions
3. Red-flag language (when to escalate)
4. Pre-visit checklist
5. Post-visit summary template.
   Keep tone calm, clear, non-alarming. No medical diagnosis."

2. **Patient Education Topics**

*"Generate 12 patient education topics for a {{clinic type}} clinic.
For each: title, 5 bullets, simple disclaimer, and CTA to book/call the clinic."*

3. **No-Show / Reminder Messages**

"Write SMS + email reminders for appointments at a {{clinic type}} clinic at 48h, 24h, and 2h. Tone: warm, professional, reassuring. Each should include: time, location, what to bring, and reschedule option."

4. **FAQ Builder (Non-Clinical)**

"Create 30 FAQs for a {{clinic type}} clinic focused on process, logistics, expectations, and policies (not medical advice)."

5. **Post-Visit Care Summary**

"Write a general 'after your visit' summary template for a {{clinic type}} clinic.
Include: what to expect, when to contact the clinic, and a disclaimer that this is general guidance, not personalized medical advice."

C. Coaches & Consultants Prompt Pack

1. **Offer Suite Generator**

"Create a 3-tier offer suite for a {{niche}} coach/consultant.
Include: starter, core, premium offers with promises, deliverables, ideal clients, and pricing logic."

2. **Authority Content Week**

"Take this expertise: [paste].
Create:

- *1 pillar content outline*
- *6 hooks*
- *1 email (story + lesson)*
- *3 CTA lines (book a call).*
  Audience: {{describe}}"

3. **Discovery Call Funnel**

"Create a discovery call funnel for this coaching offer: [paste].
Output:

- Landing page sections
- Application questions
- Confirmation email
- 2 reminder emails
- Call agenda
- Post-call follow-up email."

4. **Case Story Builder**

"Turn this client story into a case-study-style email and one website section. Include: before, after, process, and lesson learned. [paste notes]"

5. **Objection FAQ Pack**

"List the top 10 objections {{niche}} clients have about hiring a coach/consultant.
Then write short FAQ-style answers for each, tone: calm, honest, specific."

D. Law Firms (Non-Advisory Marketing) Prompt Pack

1. **Trust-First FAQ Builder**

"Create 40 informational FAQs for a {{practice area}} law firm in {{location}}. Focus on process, timeline, what to expect, documents, fees (ranges if appropriate), and consultation expectations.
Tone: calm, professional, non-advisory. Add a short disclaimer and encourage contacting the firm for legal advice."

2. **Consultation Page Copy**

“Write a ‘Request a Consultation’ page for a {{practice area}} law firm. Include: who they help, what happens next, privacy reassurance, and a calm, non-pushy CTA.”

3. **Welcome + Expectations Email**

“Write a ‘Thanks for booking your consultation’ email.
Include: date/time placeholder, what to bring, what will be discussed, and a gentle reminder that the consultation is informational.”

4. **Follow-Up After Consultation**

“Write a follow-up email for someone who had a consultation but hasn’t decided yet.
Tone: calm, informative, no pressure. Encourage questions and clarify next steps.”

5. **Content Topic Generator**

“Generate 20 educational content topics for a {{practice area}} law firm that are suitable for blogs/newsletters. Each topic should:

- *Be informational*
- *Avoid specific legal advice*
- *Encourage contacting the firm for tailored help.”*

E. Recruiting / HR Prompt Pack

1. **Role Scorecard + JD Builder**

“Create a role scorecard + job description for a {{role}} in {{industry}}. Include: outcomes, responsibilities, must-have skills, nice-to-haves, red flags, and 90-day success metrics.”

2. **Screening Process**

“Build a screening process for {{role}}.
Output:

- 8 screening questions
- Scoring rubric
- Email templates for invite, rejection, and next-step messages. Tone: respectful.”

3. **Interview Kit**

“Create an interview kit for {{role}}.
Include: interview stages, questions per competency, a score sheet, and a debrief template.”

4. **Onboarding Plan**

“Create a 30/60/90-day onboarding plan for {{role}}.
Include: Day 1 checklist, weeks 1–4 focus, 30/60/90 checkpoints, and manager 1:1 agenda.”

5. **Candidate Nurture Sequence**

“Write a 5-email candidate nurture sequence for high-potential candidates who weren’t hired yet but may be a fit in future roles. Tone: respectful, relationship-focused.”

3) Scorecards + Rubrics (HR Kit)

A. Role Scorecard Template

Role: {{Job Title}}

Department: {{Department}}

Manager: {{Manager Name}}

Time Frame: First 90 Days

1. Mission of the Role (1–2 sentences)

“This role exists to {{primary mission}} by {{how}}.”

2. Key Outcomes (SMART-ish)

List 3–7 measurable outcomes, e.g.:

- *Within 30 days, {{outcome 1}}*
- *Within 60 days, {{outcome 2}}*
- *Within 90 days, {{outcome 3}}*

3. Core Responsibilities

- Responsibility area → Description (1–2 lines)
- …

4. Competencies (What “Good” Looks Like)

- Skill/Competency: {{e.g., communication}}
    - Level expected: Basic / Intermediate / Advanced

    - Behaviors: 3–5 bullet descriptors

5. Cultural / Values Alignment

- Values: {{e.g., ownership, clarity, collaboration}}
- What it looks like in this role: 1–2 bullets each

B. Interview Rubric Template

Candidate:

Role:

Score 1–5 (1 = weak, 5 = excellent):

- Role Fit (skills & experience): __ / 5
- Problem-Solving: __ / 5
- Communication: __ / 5
- Ownership / Initiative: __ / 5
- Culture/Values Alignment: __ / 5

Comments per category

- Role Fit:
- Problem-Solving:
- Communication:
- Ownership:
- Culture:

Hire Decision: Yes / No / Maybe

Why? (1–3 sentences)

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4) Intake + Reminder Templates (Clinics)

A. Intake Form (10 Questions)

1. Full name
2. Date of birth
3. Best phone number
4. Email address
5. Reason for visit (in your own words)
6. How long has this been a concern?
7. Have you seen anyone about this before? If yes, who/where?
8. Is this urgent or could it wait a few days?
9. Any important information we should know ahead of time?
10. How did you hear about our clinic?

(Add your own clinical/regulatory items separately.)

B. Appointment Reminder Templates

48-Hour Email Reminder

Subject: Your upcoming appointment at {{Clinic Name}}

Hi {{first_name}},
*This is a friendly reminder of your appointment at **{{clinic_name}}**:*

- ***Date:** {{date}}*
- ***Time:** {{time}}*
- ***Location:** {{address}}*

Please arrive a few minutes early to check in.
If you need to reschedule, you can call us at {{phone}} or reply to this email at least {{policy window}} in advance.

We look forward to seeing you,
{{clinic_name}} team

24-Hour SMS Reminder

“Hi {{first_name}}, this is {{clinic_name}} reminding you of your appointment tomorrow at {{time}}.
Reply YES to confirm or call {{phone}} if you need to reschedule.”

2-Hour SMS Reminder

“Hi {{first_name}}, we’ll see you at {{time}} today at {{clinic_name}} ({{address short}}).
If you’re running late, please call us at {{phone}}.”

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5) Market Update + Listing Pack (Real Estate)

A. Weekly Market Update Template

Subject: {{City}} Market This Week: {{Short Hook}}

1) What Changed This Week

- {{bullet 1}}
- {{bullet 2}}
- {{bullet 3}}

2) What It Means for Buyers

Short paragraph.

3) What It Means for Sellers

Short paragraph.

4) One Local Snapshot

“In {{neighborhood}}, we saw {{example: multiple offers / price reductions / X days on market}}.”

5) If You’re Thinking of Moving…

“If you’re wondering how this applies to your situation, hit reply or book a quick call here → {{link}}.”

B. Listing Content Pack

1) Listing Inputs Worksheet

- Property type, beds, baths, size
- Neighborhood / school info
- Key features (5–7 bullets)

- Ideal buyer profile

2) Output Checklist

From one listing, you generate:

- MLS description
- Lifestyle description
- 5 social hooks
- 1 carousel outline (7–10 slides)
- 1 short video script
- 1 “Just Listed” email

You already have the prompt in the Real Estate Prompt Pack—this is the “packaging” of it as a template.

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6) Discovery Call Funnel Kit (Coaches)

A. Landing Page Outline

1. **Hero**
   - Headline: “Get a custom plan to {{result}} in {{time frame}}.”
   - Subhead: “A 20–45-minute call to clarify where you are, what’s blocking you, and what to do next.”
2. **Who It’s For**
   - 3–5 bullets describing your ideal clients.

3. **What We'll Cover**
    - Where you are now
    - Where you want to be
    - What's in the way
    - Options and next steps
4. **What You'll Walk Away With**
    - 1–3 bullet outcomes (clarity, plan, options).
5. **What This Is / Isn't**
    - "Not a high-pressure pitch. This is a working session to see if we're a fit."
6. **CTA Block**
    - Button: "Apply for a Discovery Call" / "Book Your Strategy Session"

B. Pre-Call Questions (Application)

- *What's the main result you want in the next 3–6 months?*
- *What have you already tried?*
- *What's your biggest challenge right now?*
- *Why is this important to you now?*
- *Have you worked with a coach/consultant before?*

- *Are you willing and able to invest time/energy/money to solve this?*
- *Anything else I should know before our call?*

C. Confirmation Email

Subject: Your call with {{Your Name}} is booked

Hi {{first_name}},

Thanks for booking a call. Here are the details:

- ***Date:*** *{{date}}*
- ***Time:*** *{{time}}*
- ***Link:*** *{{meeting_link}}*

On the call, we'll:

- Clarify where you are now
- Define what you want to achieve
- Identify what's in the way
- Talk through options and next steps

No pressure, no obligation—this is about seeing if we're a good fit.

If you need to reschedule, you can use the link in your calendar invite or reply to this email.

Talk soon,

{{Your Name}}

D. Call Agenda (Internal)

1. Welcome & frame (2–3 minutes)
2. Current situation (5–10 min)
3. Desired outcome (5–10 min)
4. What's in the way (5–10 min)
5. Your recommended path (5–10 min)
6. Offer (if fit) + Q&A (5–10 min)
7. Clear next step (yes / no / later)

E. Post-Call Follow-Up Email

Two versions: **Fit** and **Not Now/Not Fit**.

Fit:

"Thanks for the great conversation today, {{first_name}}.
Here's what I heard: {{summary}}.
Here's what I recommend: {{offer summary}}.
If you'd like to move forward, here's the next step: {{link / reply}}.
If now isn't the right time, no worries—feel free to reach out when things change."

Not Fit:

"Thank you again for chatting with me today, {{first_name}}.
Based on what you shared, I don't think my offer is the best fit right now.

Here are a couple of ideas/resources that might help: {{list}}.

Wishing you the best as you move forward."

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7) Consultation Capture Kit (Law Firms – Non-Advisory)

A. Consultation Page Template

Hero

"Talk to a {{practice area}} lawyer about your situation—so you understand your options before you decide."

Section: Who We Help

Short bullet list of typical client situations.

Section: What Happens in a Consultation

- You briefly share what's going on.
- We ask clarifying questions.
- We explain options and possible next steps.
- You decide what, if anything, you'd like to do next.

Section: What This Is / Isn't

- Informational, not a guarantee of representation.
- Not full legal advice for complex cases.
- A chance to see if we're the right fit.

CTA + Form

“If you’d like to schedule a consultation, complete the short form below and our team will contact you.”

B. Intake Form Fields (Non-Advisory, High-Level)

- Name
- Email
- Phone
- Best way/time to reach you
- Practice area of concern (dropdown)
- Brief description of your situation (no confidential details)
- Any deadlines or key dates we should know?
- How you heard about us
- Consent checkbox: “I understand this form does not create an attorney–client relationship and no legal advice is being given at this stage.”

C. Confirmation Email Template

Subject: We’ve received your consultation request

Hi {{first_name}},
Thank you for reaching out to {{firm_name}}.

We’ve received your request and a member of our team will review it and contact you at {{contact method}} within {{timeframe}}.

Please note:

- This message does not create an attorney–client relationship.
- We are not providing legal advice at this stage.
- We may request additional information before confirming a consultation.

If your situation is urgent or involves immediate risk, please consider contacting appropriate emergency services or a lawyer directly by phone.

Thank you,
{{firm_name}}