

GET CHOSEN™ • FREE DOWNLOAD

The Post-Close Flow

The twelve months that decide whether one transaction becomes a source of business — or an ending.

The transaction is where you earn trust. The twelve months after it are where you keep it. Most solo agents deliver a strong closing and then go quiet, and by the time the client's friend needs an agent, someone more visible has taken the seat.

This is not a drip campaign. It's a map of the moments where a past client decides whether you were **their agent** or **the agent they used once** — and what happens at each one.

HOW TO USE THIS

1. **Read the flow once, start to finish.** Then check it against your last three closings. Where did each one stop?
2. **Mark the gaps.** Most agents are strong through Day 30 and disappear after. That's usually the build list.
3. **Check the Carried By column.** Post-close is the easiest work to systemize and the easiest to skip. If a touch depends on you remembering, it will not survive a busy quarter.
4. **Build one stage at a time.** Pick the earliest stage you're missing and make it automatic before adding the next.

The Carried By Key — the 40/30/30 doctrine

QUIET TEAM ≈ 40%. Your systems: CRM, AI, MLS, file system, templates. Runs whether you're rested or slammed.

PARTNER ≈ 30%. Your Edge Business Partner™ — the planner and structure that decides *when* the touch happens and holds you to it.

YOU ≈ 30%. Judgment, conversation, and negotiation. The work only you can do — and the reason to protect it.

Referrals follow trust and visibility. You earned the trust at closing. This flow is how you stay visible long enough for it to matter.

The Post-Close Flow

Closing day through day 90 • The window where trust is still fresh

WHEN	WHAT THE PAST CLIENT IS QUIETLY WONDERING	THE TOUCH THAT ANSWERS IT	CARRIED BY
01 Closing Day	"Was I a transaction, or a person?"	A note that asks for nothing. Not a review request, not a referral ask, not a survey. One specific detail from their transaction that proves you were paying attention. The ask comes later, and it lands better because of this.	YOU
02 Week One	"Where is everything I just signed?"	Their complete file delivered in one organized place — closing statement, disclosures, warranties, contacts — labeled so they can find it in five years without calling you. Contact list of the vendors involved, in case something needs attention.	QUIET TEAM
03 Day 30	"Is anything about this house going to surprise me?"	A settling-in check that names the specific things that come up in the first month for their type of property. First referral-friendly moment: they've had a real experience and can describe it. Review request goes here, not on closing day.	QUIET TEAM YOU
04 Day 90	"Did I make a good decision?"	A short note with what their neighborhood has done since they bought — recent sales, current inventory, direction. Not a solicitation. Confirmation that the decision they were nervous about is holding up.	QUIET TEAM PARTNER

Before you turn the page

Think of your last three closings. At which stage did your contact actually stop?

What would have to be true for that stage to run without you deciding to run it?

The Post-Close Flow

Month six through the ongoing rhythm · Where referrals are actually made

WHEN	WHAT THE PAST CLIENT IS QUIETLY WONDERING	THE TOUCH THAT ANSWERS IT	CARRIED BY
05 Month Six	"Do they only reach out when they want something?"	A touch with no real estate content at all. A local resource, a seasonal reminder, something useful about where they live. This is the touch most agents skip, and it's the one that separates a vendor from a person they know.	YOU
06 The Anniversary	"Do they remember me?"	A one-year note with a current value range for their home and what changed in the market over twelve months. Dated in the planner the week they closed, so it happens whether or not you remember. Highest-response touch of the year.	PARTNER QUIET TEAM
07 Ongoing Rhythm	"Are they still around?"	A fixed quarterly cadence: market update, seasonal usefulness, neighborhood activity, year-end summary. Same rhythm for every past client, regardless of transaction size. Visibility compounds — but only if it's uninterrupted.	QUIET TEAM PARTNER
08 The Referral Moment	"Would I know how to send someone to them?"	A direct, unembarrassed sentence once the relationship is warm: who you help, and what to do if someone they know is thinking about a move. Asked plainly, once or twice a year — not implied, and not begged for.	YOU

Your one build

Pick the earliest stage you're currently missing. Build that one touch until it runs on its own. Then come back to this page.

The stage I'm building:

The touch that has to become automatic:

This is the map. The Local Presence Builder is the material.

The flow tells you which touches matter. It doesn't hand you the file-delivery package, the anniversary market update, the quarterly rhythm, or the referral conversation — branded to your brokerage, ready to send. That's what the Local Presence Builder is for.

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