



90-Day Door Growth Roadmap

Purpose

The first 90 days after in-person training should be focused on one thing: creating consistent local market awareness that leads to owner conversations, referral partners, and signed management agreements.

This plan is intentionally simple. A new franchisee does not need to become a marketing expert in the first 90 days. They need to become known locally as the rental property management person who is easy to refer to, professional, responsive, and helpful.

The goal is not to “go viral.” The goal is to build a local referral machine.

90-Day Goal

By the end of 90 days, each new franchisee should have:

25 to 50 meaningful real estate agent relationships started

10 to 20 mortgage/lender relationships started

10 to 20 investor/landlord relationships started

3 to 6 brokerage office or team meeting presentation opportunities pursued

4 to 8 local networking or investor events attended

A repeatable weekly prospecting rhythm

A local list of referral partners who understand who WholePM is, what we do, and why they should send us rental property owners

A pipeline of owner leads from agents, landlords, investors, friends/family, and local networking

Core Weekly Activity Targets

Each week, the franchisee should aim for:

50 outbound contacts to real estate agents, lenders, investors, attorneys, insurance agents, or other referral partners

10 follow-up messages to people already contacted

5 live conversations with potential referral partners

2 in-person coffee/lunch/networking meetings

1 networking event, investor meetup, Realtor event, chamber event, or brokerage/team presentation attempt



1 local market update post or video

1 referral partner list update

These are minimums. The franchisee who does this consistently will have a dramatically better chance of building early momentum than the franchisee who waits for leads to come in.

Who to Target

Real estate agents

These should be the highest-priority referral partners.

Great agent targets include:

- Agents who work with investors
- Agents who sell single-family homes, condos, townhomes, and small multifamily
- Agents who work with out-of-state buyers
- Agents who work with relocating buyers
- Agents who have listings that may not sell quickly
- Agents who post about investment properties
- Agents who are newer and need more ways to create value
- Agents with clients who bought with low interest rates and may want to rent instead of sell

Why agents matter:

They already know property owners. They are often the first person an owner calls when they are deciding whether to sell or rent. Most agents do not want to manage rentals themselves. They need a professional place to send those clients.

Mortgage professionals

Good targets include:

- Mortgage brokers
- Loan officers
- DSCR lenders
- Investor-focused lenders
- Credit union mortgage reps
- Hard money lenders
- Construction/renovation lenders

Why mortgage folks matter:



They often work with investors before, during, and after acquisition. They also talk to homeowners who may be trying to buy a new home without selling the old one.

Real estate investors and landlords

Good targets include:

- Local investor meetup attendees
- BiggerPockets users
- Facebook real estate investor group members
- Owners of small multifamily
- Out-of-state investors buying in the market
- Landlords frustrated with self-management
- Accidental landlords

Why investors matter:

They either need management now or will need it when their portfolio grows. They also know other investors.

Local business referral partners

Good targets include:

- Insurance agents
- Estate planning attorneys
- Divorce attorneys
- Probate attorneys
- CPAs
- Bookkeepers
- Contractors
- Home inspectors
- Title reps
- Relocation professionals

Why these people matter:

They encounter property owners during major life events. A divorce, death, job relocation, inherited property, or investment purchase can all create a need for professional property management.

Core Message

The franchisee should have a simple message they can repeat constantly:

“I own the local Whole Property Management location. We help rental property owners lease and manage single-family homes, condos, townhomes, and small multifamily properties. A lot of our referrals come from Realtors and



lenders who have clients who either aren't ready to sell, can't sell at the price they want, or want to keep the property as a rental. If you ever have a client in that situation, we're a good resource.”

Referral Fee Message

The franchisee should clearly and confidently offer referral fees where legally allowed.

Simple version:

“We pay referral fees for signed property management clients where legally allowed, and we try to make it really easy on the agent. You send us the owner, we handle the management conversation, and you stay the real estate expert in the relationship.”

More specific version:

“If you have a client who decides to rent instead of sell, or an investor who needs management, we can pay a referral fee when they sign a management agreement, assuming that is allowed in your state and under your brokerage rules.”

Conversation Angles for Realtors

These are the most common situations where agents should think of WholePM:

- Your seller cannot get the price they want
- Your buyer wants to keep their current home as a rental
- Your investor buyer needs a professional manager
- Your client is relocating but wants to keep the property
- Your client has a low interest rate and does not want to sell
- Your listing is sitting and the owner may consider renting
- Your past client inherited a property
- Your past client is tired of self-managing
- Your investor client wants local rental data before buying
- Your client asks, “What would this rent for?”

What to Offer Realtors

The franchisee should not just ask agents for referrals. They should offer value.

Good offers include:

- Free rent estimate for their clients
- Rental market update for their team meeting
- Quick review of whether a property is a good rental candidate
- Investor-friendly property feedback

- Landlord risk/compliance update
- Rental pricing guidance before a buyer submits an offer
- Rental versus sell analysis
- Market update video they can share with clients
- Offer to co-host an investor education event
- Offer to be the property management resource for their database

Brokerage Meeting Strategy

One of the best early-growth plays is getting invited to brokerage team meetings.

The franchisee should reach out to team leaders, managing brokers, productivity coaches, and office managers.

Offer something useful, **never a sales pitch**.

Example topics:

- “What local rentals are actually doing right now”
- “When it makes sense for a seller to rent instead of sell”
- “How Realtors can help clients evaluate rentability”
- “What investors should know before buying a rental property”
- “Why property management is a great referral source for agents”
- “How to protect your client relationship when they become a landlord”
- “Rental market update for homeowners who are waiting out the sales market”

Suggested format:

- 10 to 15 minute presentation
- Bring donuts, coffee, or breakfast
- Include simple market stats
- Explain common rent-versus-sell scenarios
- Explain how referral fees work
- Leave behind a one-page referral sheet
- Offer free rent estimates for their clients

Weekly Content Strategy

Each week, the franchisee should post one simple local market update on your website’s blog / video library.

It can be a short video, LinkedIn post, Facebook post, email, or blog.

Topics:

- “What does a 3-bedroom home rent for in [City] right now?”
- “Should you sell or rent your home in [City]?”
- “3 things landlords should know before renting their home”
- “What Realtors should know about the rental market this month”
- “Why your old 3% mortgage might make your home a great rental”

- “How long does it take to lease a rental right now?”
- “What makes a home rent faster?”
- “What rental owners should fix before listing”
- “What investors should look for in a rental property”
- “How professional property management protects the owner and the tenant”

The point is consistency. The first 90 days should create a steady pattern of being seen as the local rental expert.

Daily Operating Rhythm

Monday

Plan the week.

Update your referral partner tracker.

Send new outreach to agents and lenders.

Follow up with last week’s contacts.

Post or schedule one local market update.

Tuesday

Heavy outbound day.

Contact agents, lenders, and investor-focused professionals.

Ask for coffee meetings.

Ask for brokerage/team meeting introductions.

Send rent estimate offers.

Wednesday

Networking and meeting day.

Attend coffee/lunch meetings.

Drop by brokerage offices if appropriate.

Attend evening meetups when available.

Follow up with anyone met in person.

Thursday



Brokerage/team meeting outreach day.

Contact team leaders, managing brokers, and office managers.

Offer a rental market update presentation.

Send one-page intro/referral materials.

Continue agent and lender outreach.

Friday

Follow-up and pipeline cleanup day.

Follow up with everyone contacted during the week.

Update notes.

Send thank-you messages.

Review metrics.

Set next week's event and meeting targets.

Outreach Scripts

First message to Realtor

Subject: Good resource for rental questions

Hi [Name],

I own the local Whole Property Management location here in [Market]. We help owners lease and manage single-family homes, condos, townhomes, and small multifamily properties.

I wanted to introduce myself because we work with a lot of Realtors who have clients who may want to rent instead of sell, keep a property as an investment, or get a rent estimate before making a decision.

We also pay referral fees for signed management clients where legally allowed and permitted by brokerage rules.

Happy to be a resource if you ever have a client asking, "What would this rent for?"

Thanks,

[Name]



Follow-up message to Realtor

Hi [Name],

Just wanted to follow up here. A lot of the Realtor referrals we see come from owners who are not quite ready to sell, investors who need management after closing, or clients with low interest rates who are considering holding the property as a rental.

Happy to run a quick rent estimate anytime you have a client who is weighing those options.

Coffee invite

Hi [Name],

Would you be open to grabbing coffee sometime next week? I'd love to learn more about your business and the types of clients you work with.

I'm also happy to share what we're seeing in the local rental market right now, especially for owners who are deciding whether to sell or rent.

Brokerage/team meeting pitch

Hi [Name],

I own the local Whole Property Management location, and I wanted to see if your team ever has short guest presentations at sales meetings.

I'd be happy to come by for 10 to 15 minutes, bring coffee or donuts, and give a quick local rental market update for your agents.

The presentation would cover what homes are renting for, when it may make sense for a seller to rent instead of sell, and how agents can help clients think through that decision.

No sales pitch whatsoever. Just useful information for agents who have clients asking about rentals.

Message to lender

Hi [Name],

I own the local Whole Property Management location here in [Market]. I wanted to introduce myself because we often help owners and investors who are buying rental properties, keeping a prior home as a rental, or trying to understand rental income potential.

If you ever have clients who need a rent estimate or want to understand whether a property could work as a rental, I'd be happy to be a resource.



Message to investor/landlord

Hi [Name],

I own the local Whole Property Management location here in [Market]. We help rental owners lease and manage single-family homes, condos, townhomes, and small multifamily properties.

If you ever want a second set of eyes on rent pricing, leasing strategy, or whether a property is worth holding as a rental, I'd be happy to help.

90-Day Calendar

This is written as a 13-week Monday through Friday plan. It starts the first Monday after in-person training is completed.

Week 1: Set the foundation

Monday

Build your initial referral partner list.

Add at least 50 real estate agents.

Add at least 15 lenders.

Add at least 10 investor-related contacts.

Create your tracking spreadsheet or CRM list.

Post a simple announcement that your WholePM location is open and available as a rental property management resource.

Tuesday

Send 15 Realtor intro messages.

Send 5 lender intro messages.

Identify 3 local real estate investor groups on Meetup, Facebook, BiggerPockets, or local association sites.

Find at least 2 upcoming events to attend.

Wednesday

Send 15 more Realtor intro messages.



Send 5 more lender intro messages.

Ask 5 agents if they would be open to coffee.

Join 3 local Facebook or investor groups.

Comment helpfully in at least 3 local real estate/investor conversations.

Thursday

Research brokerages and teams in your market.

Build a list of 10 team leaders, managing brokers, or office managers.

Send 5 brokerage meeting pitch messages.

Send 10 more Realtor intro messages.

Friday

Follow up with everyone who responded.

Schedule any coffee meetings.

Confirm at least 1 networking event for next week.

Post a short rental market thought or video.

Review totals:

50 outbound contacts

5 live or message conversations

1 event identified

2 coffee meetings requested

Week 2: Start live conversations

Monday

Send 15 new Realtor messages.

Follow up with last week's warm contacts.



Ask 3 agents for coffee.

Send 3 brokerage meeting pitches.

Tuesday

Send 10 lender or mortgage professional messages.

Send 10 Realtor follow-ups.

Prepare a simple one-page talking sheet: “When to refer a client to WholePM.”

Wednesday

Attend a coffee meeting, networking lunch, or investor event if available.

If no event is available, schedule 2 coffee meetings.

Send thank-you/follow-up messages afterward.

Thursday

Send 5 brokerage/team meeting pitches.

Send 10 Realtor messages.

Post a local rental market update.

Friday

Clean up the referral tracker.

Tag each contact as New, Contacted, Warm, Meeting Scheduled, Referral Source, or Not a Fit.

Send follow-up messages to all warm contacts.

Set next week’s meeting and event goals.

Week 3: Create market authority

Monday

Create a short “rent versus sell” market update.

Send it to 10 agents already contacted.



Send 10 new agent messages.

Tuesday

Contact 10 lenders.

Ask 5 agents or lenders for coffee.

Research 5 local title reps and insurance agents.

Wednesday

Attend or schedule 1 in-person meeting.

Ask every live contact this question:

“Who do you know who works with investors or homeowners who may be deciding whether to sell or rent?”

Thursday

Send 5 brokerage presentation offers.

Send 10 Realtor messages.

Send 5 messages to investor-friendly agents.

Friday

Post one rental market update.

Follow up with all warm contacts.

Review: How many referral partners now understand what WholePM does?

Week 4: First monthly push

Monday

Send 20 new Realtor messages.

Follow up with 10 prior contacts.

Ask 3 warm contacts for introductions to other agents or lenders.

Tuesday



Send 10 lender messages.

Send 5 investor group messages or comments.

Register for 1 real estate/investor/networking event.

Wednesday

Attend 1 coffee or networking meeting.

Bring a simple referral explanation.

Ask directly:

“If you have a client who is deciding whether to rent or sell, would you feel comfortable introducing us?”

Thursday

Send 5 brokerage meeting pitches.

Follow up on all previous brokerage/team meeting pitches.

Send 10 more agent messages.

Friday

End-of-month review.

Count total:

Outbound contacts

Live conversations

Coffee meetings

Events attended

Brokerage presentations requested

Owner leads generated

Referral partners likely to send business

Post a monthly rental market update.



Week 5: Expand beyond agents

Monday

Add 25 new contacts:

CPAs

Insurance agents

Estate attorneys

Divorce attorneys

Probate attorneys

Home inspectors

Title reps

Send 15 intro messages.

Tuesday

Send 15 Realtor messages.

Send 5 lender messages.

Ask 5 contacts for coffee or a phone call.

Wednesday

Attend or schedule one meeting.

Create a simple “free rent estimate” offer.

Send it to 10 agents.

Thursday

Send 5 brokerage presentation pitches.

Send 10 follow-ups.

Ask warm agents if their office has monthly team meetings.



Friday

Post a local rental tip.

Follow up with warm contacts.

Update tracker and next steps.

Week 6: Brokerage presentation week

Monday

Send 10 brokerage/team meeting pitches.

Contact team leaders, managing brokers, productivity coaches, and office managers.

Send 10 Realtor messages.

Tuesday

Prepare a 10-minute rental market presentation.

Topic:

“When it makes sense for an owner to rent instead of sell.”

Include:

Current rental demand

Typical rent ranges

What makes a home rent faster

How agents can refer

Referral fee explanation where legally allowed

Wednesday

Attend a networking event or coffee meeting.

Ask for one brokerage meeting introduction.

Send thank-you notes.



Thursday

Send 10 lender messages.

Send 10 Realtor follow-ups.

Post a rental market update.

Friday

Review brokerage presentation progress.

Goal: at least 1 meeting scheduled or in active conversation.

Follow up with every pending office/team contact.

Week 7: Investor focus

Monday

Find 5 local investor groups.

Post or comment helpfully in 3 groups.

Send 10 messages to investor-friendly Realtors.

Tuesday

Send 10 messages to lenders who work with investors.

Send 10 messages to agents with investor content or rental-related posts.

Wednesday

Attend investor meetup, BiggerPockets event, REIA event, or business networking event.

Ask people:

“How many rentals do you own?”

“Are you self-managing right now?”

“What are you seeing in the rental market?”

Thursday



Follow up with everyone from the event.

Offer free rent estimates.

Ask if they know anyone buying or holding rentals locally.

Friday

Post an investor-focused market update.

Example:

“What investors should know before buying a rental in [Market].”

Update tracker.

Week 8: Referral partner deepening

Monday

Review all warm contacts from Weeks 1 through 7.

Pick top 20.

Send personal follow-ups.

Tuesday

Ask 10 warm agents:

“Do you have any past clients who may be considering renting instead of selling this year?”

Ask 5 lenders:

“Do you have any clients buying rental property right now who might need management?”

Wednesday

Schedule or attend 2 coffee meetings.

Bring specific value:

Rent estimate

Market data



Owner checklist

Investor property feedback

Thursday

Send 5 brokerage presentation follow-ups.

Send 10 new agent messages.

Post a rental market update.

Friday

Review warm partner list.

Identify your top 10 likely referral partners.

Send thank-you/check-in messages.

Week 9: Second monthly push

Monday

Send 20 new Realtor messages.

Send 10 follow-ups.

Ask 3 warm contacts for introductions.

Tuesday

Send 10 lender messages.

Send 10 local business referral partner messages.

Wednesday

Attend a networking meeting, coffee, lunch, or investor event.

Ask for referrals directly but professionally.

Thursday

Send 5 brokerage presentation pitches.



Send 10 Realtor follow-ups.

Create a short “what we do” post.

Friday

Monthly review.

Count:

Total contacts added

Total outbound messages

Total conversations

Total meetings

Total events

Total presentation opportunities

Total owner leads

Total signed doors

Post a monthly market update.

Week 10: Owner lead conversion focus

Monday

Review every owner lead, soft lead, or possible referral.

Make sure every lead has a next step.

Send follow-up messages.

Tuesday

Ask warm referral partners for specific help:

“Do you have one client right now who is deciding whether to sell or rent?”

“Do you know one investor who needs a property manager?”



“Can I send you a rent estimate template to use with your clients?”

Wednesday

Attend or schedule 1 to 2 meetings.

Practice explaining the WholePM model clearly:

Self-tours

Strong leasing systems

Professional maintenance coordination

Owner communication

Low-friction referral process

Thursday

Send 10 new agent messages.

Send 10 follow-ups.

Post a rental market update.

Friday

Pipeline cleanup.

Move every contact into a status.

Send “next step” emails.

Prepare next week’s target list.

Week 11: Local expert positioning

Monday

Create a simple local rental market update:

Average rent by property type

What is leasing quickly



What is sitting

Advice for owners

Send it to 20 referral partners.

Tuesday

Offer the market update as a brokerage presentation.

Message 10 brokerage/team contacts.

Wednesday

Attend an event or meet 2 referral partners.

Ask for feedback:

“What rental questions are you hearing from clients right now?”

Thursday

Send 15 new agent messages.

Send 5 lender messages.

Post the market update publicly.

Friday

Follow up with anyone who engaged with the market update.

Ask if they have a client who needs a rent estimate.

Update tracker.

Week 12: Strong referral ask week

Monday

Identify your top 25 warm referral partners.

Send personal messages.

Do not send generic blasts.



Tuesday

Ask for specific referrals:

“Who do you know right now who owns a rental?”

“Do you have any clients who moved but kept their old home?”

“Do you know any investors who are self-managing?”

“Any listings where the seller might consider renting instead?”

Wednesday

Schedule 2 meetings.

Attend 1 event if available.

Send thank-you messages immediately afterward.

Thursday

Send 10 brokerage/team meeting follow-ups.

Send 10 lender follow-ups.

Post a local rental tip.

Friday

Review:

Who is likely to refer?

Who needs more nurturing?

Who is not a fit?

Who should be contacted monthly?

Set the first ongoing monthly follow-up list.

Week 13: Transition into ongoing rhythm

Monday



Review the full 90-day tracker.

Identify:

Top 25 referral partners

Top 10 Realtor relationships

Top 5 lender relationships

Top 5 investor relationships

Top 5 local business referral relationships

Tuesday

Create your ongoing monthly referral plan.

Each month going forward:

Contact top 25 referral partners

Attend 2 networking events

Post 4 market updates

Request 2 brokerage/team presentations

Have 4 coffee meetings

Send 100 outbound prospecting messages

Wednesday

Follow up with all open leads.

Push for owner consultations where appropriate.

Ask referral partners if they have anyone who needs a rent estimate this month.

Thursday

Post a 90-day market update.

Thank local referral partners publicly where appropriate.

Send private thank-you messages to key contacts.



Friday

Final 90-day review.

Record:

Doors signed

Owner leads generated

Referral partners created

Meetings completed

Events attended

Presentations booked

Most effective lead source

Weakest activity area

Next 30-day focus

90-Day Scorecard

Track this every Friday.

Weekly metrics

New contacts added:

Outbound messages sent:

Follow-ups sent:

Live conversations:

Coffee/lunch meetings:

Networking events attended:

Brokerage/team presentations pitched:

Brokerage/team presentations scheduled:



Owner leads generated:

Rent estimates requested:

Management consultations scheduled:

Management agreements sent:

Doors signed:

90-day targets

Outbound contacts: 600+

Follow-ups: 150+

Live conversations: 50+

Coffee/lunch meetings: 20+

Networking events: 8+

Brokerage presentation pitches: 10+

Brokerage/team presentations scheduled: 3+

Owner leads generated: 10+

Management consultations scheduled: 5+

Doors signed: Market dependent, but the goal is early traction and a working referral engine

What Good Looks Like

By the end of 90 days, the franchisee should be able to say:

I know which local agents work with investors.

I know which lenders work with rental buyers.

I know which local networking groups are worth attending.

I have a list of referral partners who understand what WholePM does.

I have at least a few people who have said they will send me owners.



I know how to ask for referrals without sounding awkward.

I have practiced explaining our model over and over.

I have a weekly rhythm I can keep doing.

I have started creating local market authority.

Simple Daily Checklist

Every weekday, do these before calling it done:

Send at least 10 outbound messages.

Send at least 2 follow-ups.

Ask at least 1 person for a meeting, referral, or introduction.

Add notes to the tracker.

Move every warm contact to a next step.

Every week, do these before calling it done:

Attend or schedule 1 event.

Schedule 2 coffee meetings.

Post 1 local rental market update.

Pitch 5 brokerage/team meetings.

Review the scorecard.

Important Mindset

This business grows through trust, repetition, and local visibility.

Most people will not refer after one message. That is normal.

Most agents already have a property manager they know, or they have never thought much about property management as a referral opportunity. That is also normal.

The franchisee's job is to keep showing up, keep being useful, and keep making it easy for local professionals to remember them when an owner says:



“I might rent it out instead.”

“I wonder what this would rent for.”

“I bought an investment property and need a manager.”

“I’m tired of managing this myself.”

That is the opening. WholePM needs to be the name they think of when that conversation happens.