The Shane call.

30 minutes. Two jobs. Unblock the website access live on the phone, then get the six answers that decide the rebrand. Everything else goes in the notes grid for later.

BEFORE YOU DIAL

- [ ] This guide printed, pen out, timer where you can see it.
- [ ] LP thread open — Case #00603921 — in case he asks what's stuck.
- [ ] Audit findings nearby for reference. Don't present them; this call isn't about the audit.
- [ ] He should be at a computer, not walking the dog. Confirm by text before calling.

THE SHAPE OF THE CALL

00–05

Quick wins — live, together

Don't assign homework; do it on the call. **1)** He goes to app.luxurypresence.com → Forgot password → shane.crowley@compass.com. If the reset lands, he's in — add candice.powers@outlook.com as a user on the spot. **2)** While you talk, he searches his email for "Luxury Presence," then "domain" — and forwards what he finds. Right then.

05–20

The Jerry venture

The real agenda. Six must-get questions on page 2. You're not evaluating the idea — you're extracting the facts you need to name and brand it.

20–27

The brand fork

Present the two lanes, decide nothing: **Lane A** — BBP refresh, venture lives under it. **Lane B** — new second brand, BBP stays as-is. Which lane wins depends entirely on his answers to 3, 4 and 6. Say exactly that.

27–30

Lock commitments

Recap who does what by when — page 3. Get a real date for the next conversation before you hang up, not "soon."

(House rule: when he wanders — and he will — write it in the grid, say "adding it to the list," and pull back to the question you were on.)

MUST-GET — SIX ANSWERS, ASK THEM LIKE THIS

1 **THE OFFER**
"Walk me through one deal, start to finish. Who shows up, what do we actually do, and what do they pay for?"

2 **THE CUSTOMER**
"Who's the client — the developer, the investor, or the buyer? Who writes the check?"

3 **JERRY**
"What does Jerry bring, exactly — his money, his contacts' money, or a fund? Does he have an entity or a license?"

4 **THE STRUCTURE**
"Does this live under BBP, or is it a new thing? Who owns what?"

5 **THE MORTGAGE PIECE**
"Who's the actual lender? Are you referring buyers, or is Jerry originating loans?"

6 **COMPLIANCE**
"One boring thing: deals, capital, and mortgages under one roof has disclosure rules. Ask your Compass broker the side-venture question this week — so we never have to un-print anything."

NICE-TO-GET

— **Budget —** "Once this is real, what do you want to spend monthly on marketing?"

— **Timeline —** "When do you want the first lead walking in?"

LISTEN FOR — RED FLAGS

— **Other people's money, no entity** → securities territory. Park the brand talk.

— **Can't name who pays** → it's an idea, not a business. Market BBP now, brand this later.

— **"We'll deal with Compass later"** → later means after the wrong brand is built.

— **Every answer routes through Jerry** → Jerry belongs on the next call.

SAY IT LIKE THIS

— Not "I need to scope the engagement" — **"I can't name it until I know what it is."**

— Not "there are compliance issues" — **"one question to your broker now beats un-printing later."**

— If he asks what it'll cost: **"You'll get that in writing once I have these six answers."** Don't price on the phone.

SHANE — BY TONIGHT

- [ ] Password reset attempted (if not done live).
- [ ] LP contract / invoice emails forwarded.
- [ ] Domain / registrar emails forwarded.
- [ ] Google logins sent — or "none" confirmed.

SHANE — THIS WEEK

- [ ] Broker / side-venture question asked at Compass.

CANDI — NEXT

- [ ] Keep LP follow-ups running (access + account answers).
- [ ] Positioning one-pager — two brand lanes — once the six answers land.

NEXT CHECK-IN

- [ ] Date locked: ____________

NOTES