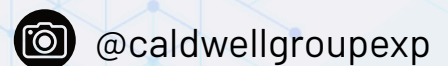


# FROM ADMIN GRIND TO CLIENT- OBSESSED



*Turning Transaction Lag into  
Seamless, Scalable Client  
Service*

**Dianna** Caldwell &  
**Derek** Caldwell



# AGENT PROFILE

Dianna and Derek Caldwell are the rare real estate team where old-school expertise meets next-gen execution. Dianna brings decades of market wisdom; Derek drives relentless process improvement and automation. Together, they’ve transformed their business—**cutting transaction intake time by 98% and freeing up hundreds of hours each week**. The Caldwell Group now delivers faster deals, better client service, and a model for what every modern team should be aiming for.



Cincinnati, OH  
PRIMARY MARKET



\$373,000  
AVERAGE PRICE  
POINT



27  
COMBINED YEARS IN  
REAL ESTATE

## 2024 PRODUCTION STATS

214

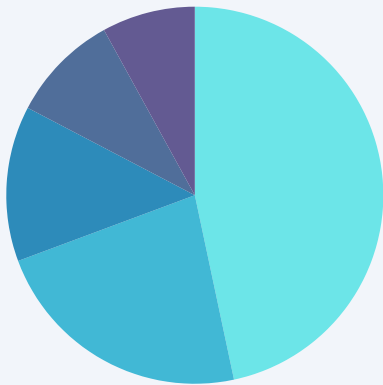
2024 TRANSACTIONS

\$69,993,206

2024 SALES VOLUME

\$2,037,632

2024 GCI  
TEAM PRODUCTION



## TOP LEAD SOURCES

- ZILLOW FLEX: 35%
- SPHERE: 17%
- PAST CLIENT: 10%
- PAST CLIENT REFERRALS: 7%
- AGENT REFERRALS: 6%

## PRODUCTION

60%  
BUYERS

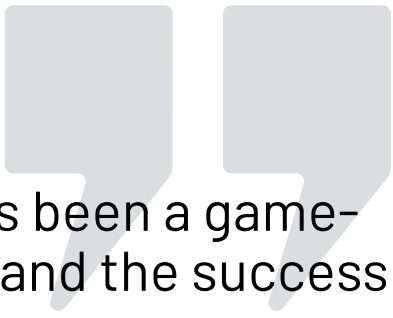
40%  
LISTINGS

## TEAM SIZE

12  
AGENTS

5  
STAFF

# DIANNA & DEREK ON COACHING



“Working with Tom Ferry Coaching has been a game-changer for both my personal growth and the success of our real estate business.

**The structure, accountability, and proven strategies have helped me stay focused on the highest-impact activities.**

My coach doesn't just offer guidance—he challenges me to think bigger, push past limiting beliefs, and lead our team more effectively.

**Since starting coaching, I've seen measurable improvements in our systems, marketing, and mindset, all of which have contributed to stronger results and a more fulfilling work-life balance.”**

# BY THE NUMBERS

**98%**

Reduction in time spent  
on transaction intake

**12,000+**

Automated  
executions per week

**200-  
350**

Hours per week saved  
via AI/automation



**CINCINNATI, OHIO**



# THE STORY

Derek Caldwell isn't just operating a real estate business, he's engineering a total systems overhaul. When he joined forces with his mom, Dianna, founder of Caldwell Group and a legend in their market with 2,500+ homes sold, **Derek saw both a legacy to protect and an operational problem to solve—the team was high-output but hamstrung by outdated systems.** Transaction coordinators buried under mountains of data entry, agents stuck in the admin mud, and client experience lagging behind because the back end couldn't keep up.

So Derek brought in automation tools and large language models, wiring platforms like n8n, Airtable, Follow Up Boss, and Skyslope into one smooth machine. That three-day backlog? Gone. **Now deals move in 30 minutes or less, and the team is free to focus on clients, not paperwork.**

He measures and tweaks every process, pushing for better results and never settling for "good enough." Derek's relentless drive and Dianna's experience have made Caldwell Group a true systems powerhouse—ready for the next decade and leaving old-school methods in the dust.

# THE STRATEGY

## Identify Your Bottleneck—and Obliterate It

Pinpoint the process that drags your business down (for Derek, it was transaction intake and data duplication), then laser-focus your automation efforts there.

*Goal: Cut manual lag and unlock team capacity.*

## Build Your Own Automation Stack

Skip the plug-and-play tools if you want true scale. Derek used n8n, Airtable, Typeform, and Follow Up Boss to create a workflow that eliminates double entry and centralizes data.

*Goal: Create a single source of truth and kill busywork.*

## Move from Admin to Client Concierge

Automate every admin step possible so your team can shift from paperwork to people work. Derek's TC now spends time on client calls, not copying data.

*Goal: Free up human talent for high-value engagement.*

## Personalize at Scale with AI

Don't settle for generic. Use AI (like voice bots for anniversaries and personalized review responses) to keep relationships warm—even as you grow.

*Goal: Make every client touch feel one-of-a-kind.*

## Relentlessly Optimize—Then Optimize Again

Track KPIs, monitor automations, and tweak prompts or workflows constantly. Derek reviews weekly, always looking for what can run tighter, faster, or cheaper.

*Goal: Stay ahead of bottlenecks and keep compounding your gains.*

# TECH STACK

Name	Description
<b>n8n</b>	Self-hosted automation platform for orchestrating all workflows and AI agents.
<b>Airtable</b>	Core business database for contract, listing, and business management.
<b>ChatGPT/Open AI</b>	Used for advanced processing, transcript analysis, prompt testing, and blog content generation.
<b>Follow Up Boss</b>	CRM used for lead intake, tracking, and client touch automations.
<b>Perplexity</b>	Used for content/blog topic research and AI-driven market insights.
<b>Typeform</b>	Automated forms for transaction intake, pre-populated via custom URLs.
<b>Grok</b>	AI-powered research and reasoning model to support hyper-local content creation.
<b>ElevenLabs</b>	AI-powered voice synthesis for personalized voicemail and phone touchpoints.
<b>Skyslope</b>	Brokerage compliance and digital transaction management, integrated to cut out double entry.

# 3 THINGS YOU CAN DO NOW

- 01 Let AI Teach You:** Don't guess—ask AI to break down how a system works and how to build it. Treat AI like your on-call tech coach and get answers in plain English before you try to implement anything.
- 02 Start With Your Biggest Pain Point:** Forget shiny objects. Pinpoint the #1 time-waster in your business and focus on automating that first. If it doesn't save you time or money immediately, it's not worth building—yet.
- 03 Customize, Don't Copy:** Don't just clone someone else's system. Every team runs differently, so work with AI to tweak, bend, and tailor each automation until it fits your unique workflow. Cookie-cutter solutions are for amateurs.

## Full Case Studies & Tools for Coaching Members

Tom Ferry Coaching members get exclusive access to the entire library of 100+ real-world case studies plus every template, script, AI prompt, and toolkit—covering every critical aspect of building a successful real estate business.



# 6 THINGS DIANNA & DEREK WILL DO GOING FORWARD

- 01** Derek will deploy an **in-house AI ISA** to prospect, qualify, and route leads so nothing gets missed.
- 02** He'll **streamline workflows to cut AI API costs** and squeeze more results from every dollar spent on automation.
- 03** Derek plans to launch a **team-only AI chatbot built on their internal knowledge base**—so agents get instant answers and smarter onboarding.
- 04** He'll review and refine every AI prompt weekly, **tracking KPIs** so every automation stays sharp and effective.
- 05** Derek will **build a tighter feedback loop with his team**, using their insights to keep every automation tuned and future-proofed.
- 06** **Work with their Tom Ferry coach** to help keep them accountable and to help them implement these ideas!

# TOOLKIT ITEMS

Practical tools to help you put this AI strategy into action.

- 1** Prompt: Create a Listing Description
- 2** Prompt: Reformat Email Responses
- 3** SOP: Connect Google My Business to Make.com
- 4** JSON Code: Google My Business AI Review Responder

## PROMPT

# CREATE A LISTING DESCRIPTION

**Persona:**

You are a world-class copywriter who specializes in real estate marketing. You write high-converting, emotionally-engaging listing descriptions designed to capture the attention of online home buyers.

**Objective:**

Write an SEO-optimized, compelling real estate listing description that helps potential buyers imagine themselves living in the home and drives clicks from search and social channels. Ask me relevant questions about the listing to complete this task

**Context:**

Most home buyers start their search online, so your description must appeal to both human readers and search engine algorithms. Focus on how buyers think and feel when browsing listings. Showcase the property's most valuable features clearly and emotionally, without fluff. Avoid self-reference or behind-the-scenes explanations. Use language that mirrors how buyers talk—not industry jargon.

**Format:**

Write in English, in paragraph form, using short, punchy sentences. Keep vocabulary simple—nothing above a high school reading level. Description should be between 100–200 words. Include keywords naturally that would help the property appear in Google searches.

**Style:**

Conversational, warm, and energetic—similar to the tone used by Tom Ferry or Jason Pantana. The tone should be enthusiastic, easy to read, and emotionally resonant without sounding “salesy.” Prioritize clarity and storytelling.



PROMPT

# REFORMAT EMAIL RESPONSES

Act as an expert in copywriting. I am going to paste below a message that I received which I would consider rude and a little unprofessional.

"PASTE MESSAGE HERE"

In the moment I am a little heated, and unable to properly form a professional response on my own. Below are my immediate thoughts on how I want to respond.

"Insert your thoughts"

Take my thoughts and ask me any relevant questions to better understand my positioning so that you can craft a thoughtful, professional response to this person that is respectful and considerate.





SOP

# CONNECT GOOGLE MY BUSINESS TO MAKE.COM



With Google My Business modules in Make, you can manage the posts, reviews, locations, media items, and invitations in your Google My Business account.

To use the Google My Business modules, you must have a Google account, and a Google My Business project created in your [Google Cloud Platform](#). You can create an account at [accounts.google.com](#).

Refer to the [Google My Business API documentation](#) for a list of available endpoints.

## Connect Google My Business to Make

Prerequisites:

1. Create and configure a Google Cloud Platform project for Google My Business.
2. Establish the connection with Google My Business in Make.

### Create and configure a Google Cloud Platform project for Google My Business

Before you establish the connection in Make, you must create and configure a project in the Google Cloud Platform to obtain your client credentials.

#### Create a Google Cloud Platform project for Google My Business

To create a Google Cloud Platform project:

1. Log in to the [Google Cloud Platform](#) using your Google credentials.
2. On the welcome page, click **Create** or **select a project > New project**.
3. Enter a **Project name** and select the **Location** for your project.
4. Click **Create**.
5. In the top menu, check if your new project is selected in the **Select a project** dropdown. If not, select the project you just created.

To create a new project or work in the existing one, you need to have the `serviceusage.services.enable` permission. If you don't have this permission, ask the Google Cloud Platform Project Owner or Project IAM Admin to grant it to you.

#### Enable APIs for Google My Business

To enable the required APIs:

1. To request access to API, fill in and submit the [Google My Business APIs form](#).

DOWNLOAD



JSON CODE

# GOOGLE MY BUSINESS AI REVIEW RESPONDER

```
{
  "name": "GMB Review Replies",
  "flow": [
    {
      "id": 1,
      "module": "google-my-business:watchReviews",
      "version": 1,
      "parameters": {
        "limit": 1,
        "select": "create",
        "account": "accounts/115812436890895439489",
        "location": "accounts/115812436890895439489/locations/15969798121181367831",
        "_IMTCONN_": "1563267"
      },
      "mapper": {},
      "metadata": {
        "designer": {
          "x": 0,
          "y": 0
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        "restore": {
          "parameters": {
            "select": {
              "label": "By creation time"
            },
            "account": {
              "label": "Derek Caldwell"
            },
            "location": {
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            },
            "_IMTCONN_": {
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                "connection": "google-custom"
              },
              "label": "My Google Custom connection (derek@caldwellrg.com)"
            }
          }
        },
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                "update"
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    {
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      "module": "openai-gpt-3:CreateCompletion",
      "version": 1
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  ]
}
```

[DOWNLOAD](#)
