

SETUP GUIDE · MAKE AND ZAPIER

Get the annual reviews running.

This pack writes a personal annual-review email (and SMS, and an optional phone nudge) to clients you already settled. It reads the replies. You only see the people who want a meeting.

Pick Make or Zapier. Make is faster because you import a file. Zapier is the same engine, built by hand. About 25 minutes either way.

What is in the zip

File	What it is
START-HERE.pdf	This guide. Open it first.
01-Outbound.blueprint.json	Make: the engine that finds review-due clients and writes to them.
02-Reply-Triage.blueprint.json	Make: the engine that reads replies and only pings you for HOT or BOOKED.
03-Sheets-Bridge.blueprint.json	Make: only if you use ActivePipe, BrokerEngine or AFG Suite360.

Zapier cannot import those JSON files. Recreate the same two engines using the Zapier section below. The prompts are written out so you can paste them.

Before you start

You need your CRM, a Make or Zapier login, an OpenAI account, and the mailbox you send client email from.

1. Create three fields in your CRM

Do this first. If you skip it, the engine will not know who is due.

Name it this	Type	What it holds
tbt_review_state	Text	due, sent, hot, booked, later, or opt_out
tbt_last_review_at	Date	Last time you touched them for a review
tbt_review_due_on	Date	The anniversary. Who gets picked up today.

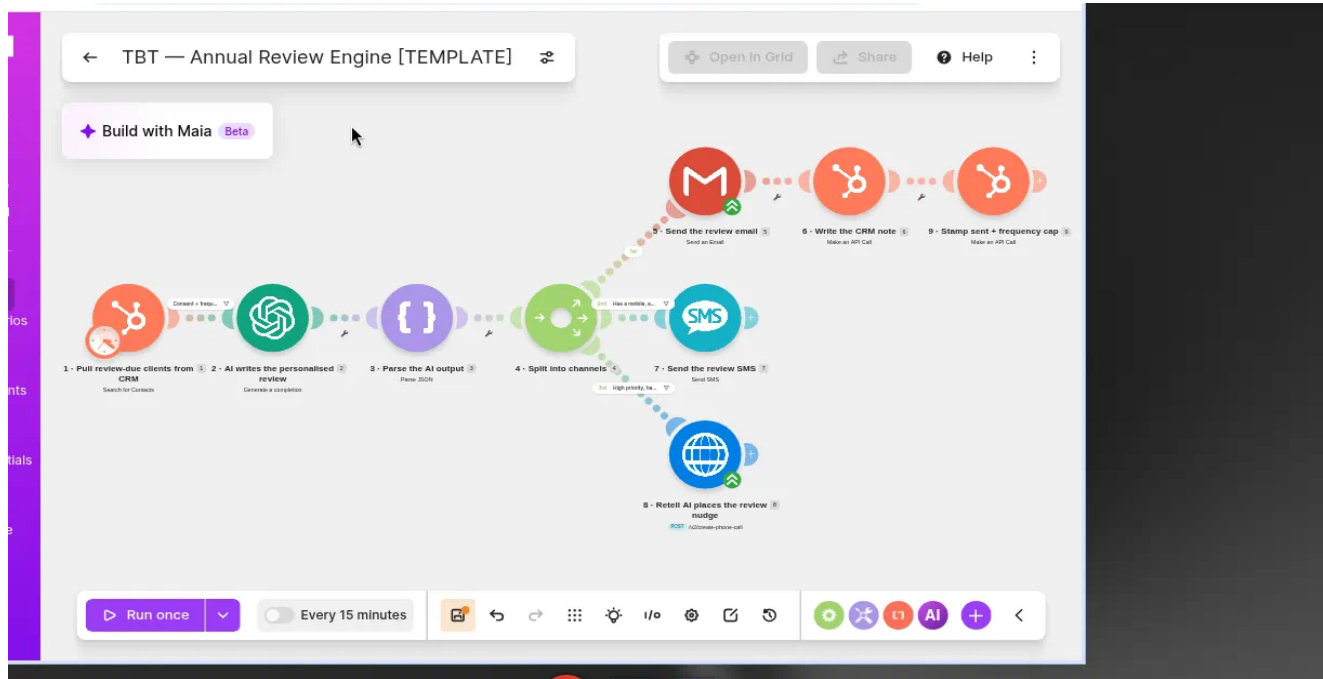
In HubSpot: Settings → Data management → Properties → Create. Same idea in every CRM. If yours will not let you add fields, use file 03 and a Google Sheet instead.

Make — import the two files

Open make.com and sign in. Scenarios → Create a new scenario. On the empty canvas, the three dots → Import Blueprint. Choose 01-Outbound.blueprint.json. Repeat for 02-Reply-Triage.blueprint.json. You do not drag anything.

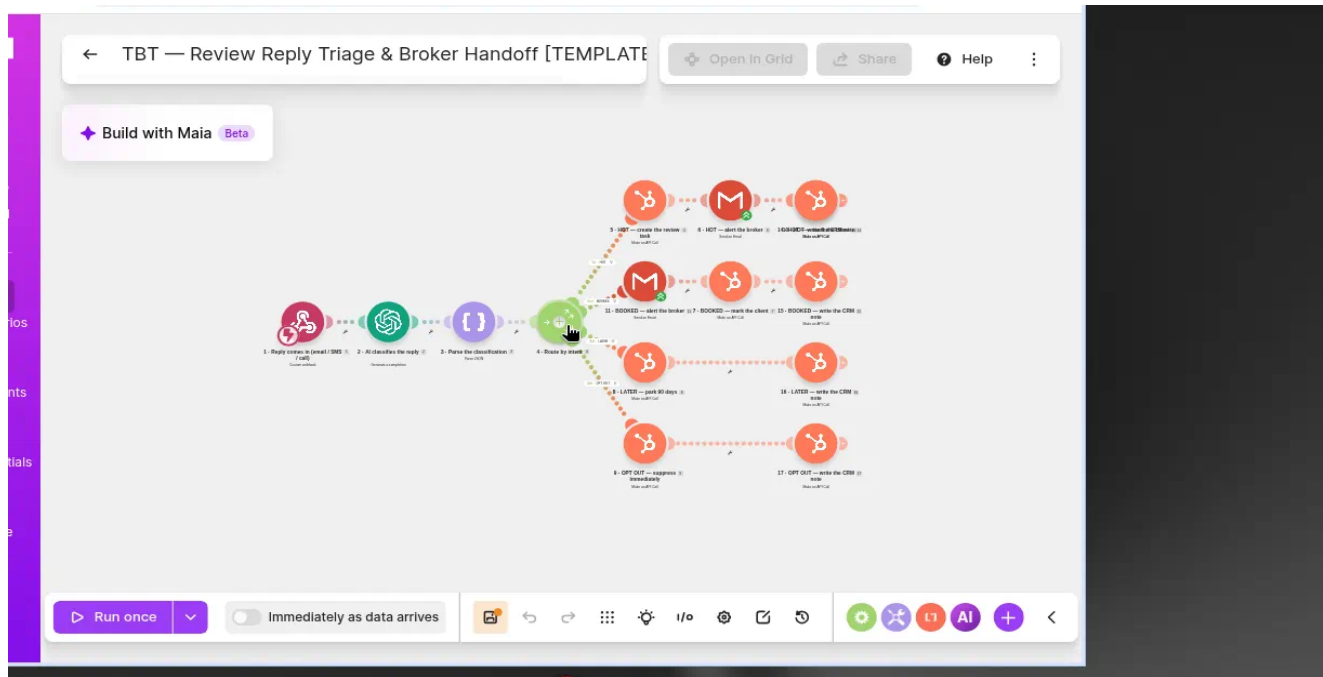
ActivePipe, BrokerEngine or AFG: import 03-Sheets-Bridge.blueprint.json instead of file 01. Export your review-due clients to a Google Sheet.

This is the outbound canvas after a real import. The prompts and field mappings are already inside the modules.



HubSpot pulls who is due. AI writes the review. Then email, SMS, or an optional AI phone nudge. Leave it OFF until you connect accounts and test.

This is the reply canvas after a real import.



A reply comes in. AI classifies it. HOT and BOOKED alert you. LATER parks 90 days. OPT OUT stops immediately.

Zapier — build the same two Zaps

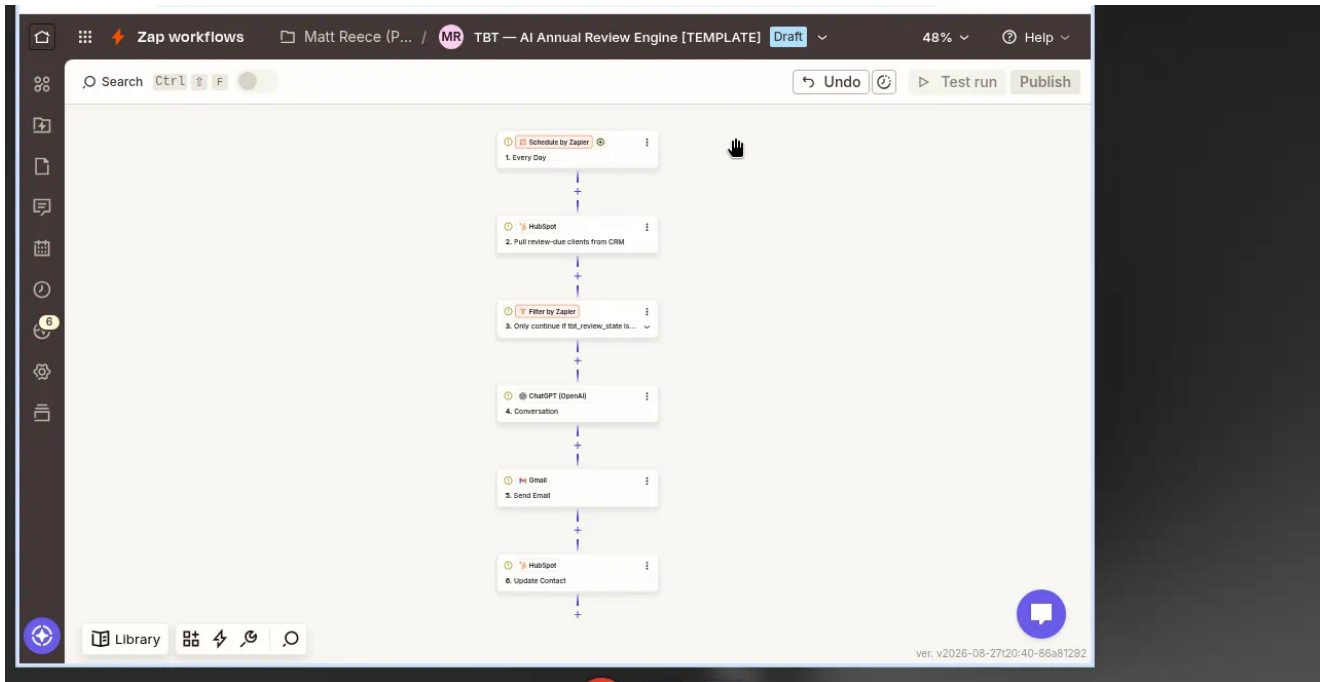
Zapier cannot import a file. Create two new Zaps. Leave them off. Paste the prompts from this page into the ChatGPT steps.

Zap 1 — outbound

1. Trigger: Schedule by Zapier, every day.
2. HubSpot (or your CRM, or Google Sheets): find contacts where `tbt_review_state` is due and `tbt_review_due_on` is today or earlier.

3. Filter: only continue if they are due, not opt_out.
4. ChatGPT: Conversation. Paste the outbound prompt below.
5. Gmail: send the email the AI wrote.
6. HubSpot: set `tbt_review_state` to sent and `tbt_last_review_at` to today.

This is that Zap, built in Zapier.

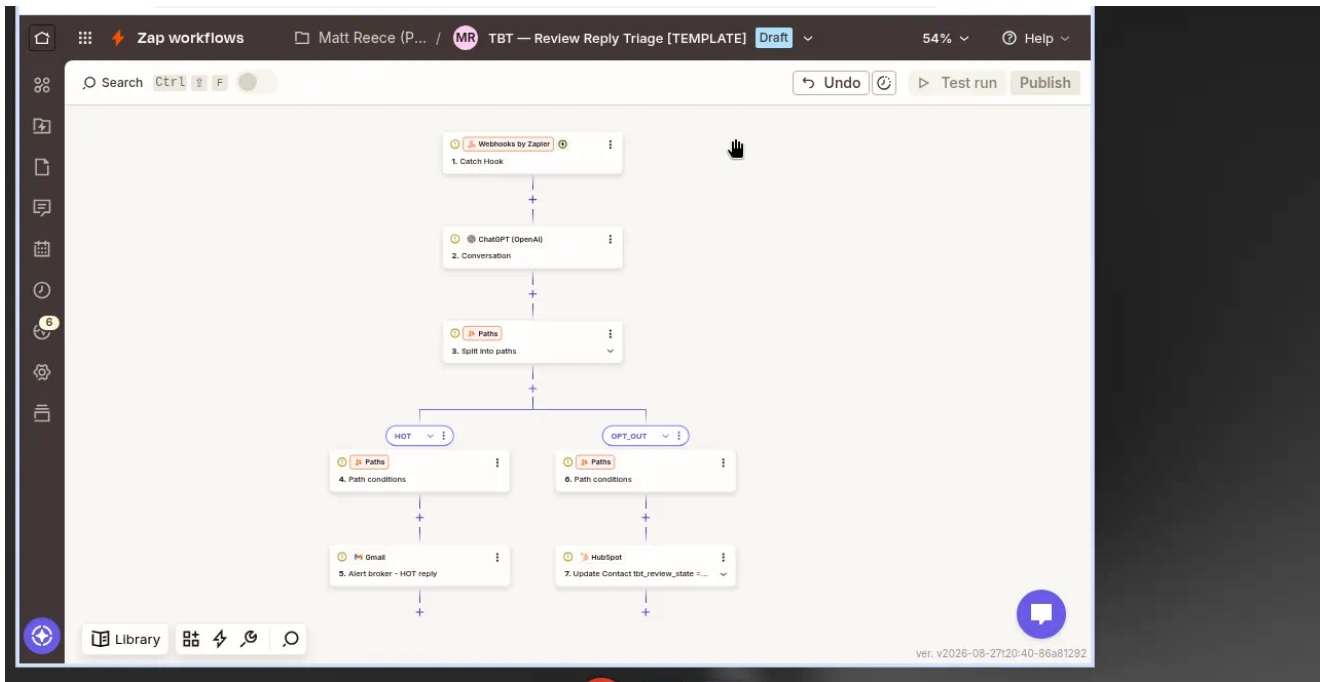


Orange warnings mean the accounts are not signed in yet. That is normal on a fresh Zap. Sign in to HubSpot, ChatGPT and Gmail, then they clear.

Zap 2 — reply triage

1. Trigger: Webhooks by Zapier (Catch Hook), or a new email in the inbox you send reviews from.
2. ChatGPT: paste the classifier prompt below.
3. Paths: HOT and OPT OUT at minimum. Add BOOKED and LATER if your Zapier plan allows more than two paths. Free Zapier only splits two ways.
4. HOT: email yourself, set `tbt_review_state` to hot.
5. OPT OUT: set `tbt_review_state` to opt_out. Do not write again.

This is that Zap, built in Zapier.



Two paths on the free plan: HOT and OPT OUT. BOOKED is the same as HOT with a diary hold. LATER parks tbt_review_due_on 90 days.

The two prompts to paste

Outbound (Zap 1, ChatGPT Instructions)

You are the AI assistant for an Australian mortgage broker. You write short, warm, compliant annual-review messages to existing clients whose home loan has been settled and whose review is now due. Australian English. No hype, no emojis. Never give financial advice, never quote a rate, never promise a saving, never recommend refinance or staying put. Never create false urgency. Always include a clear opt-out. Email under 130 words. SMS under 300 characters including the opt-out. If a field is blank, do not invent it. One question at the end of the email. Return ONLY a JSON object with keys: email_subject, email_body_html, sms_text, call_opening_line, priority (HIGH, MEDIUM or LOW).

Classifier (Zap 2, ChatGPT Instructions)

Classify the reply into exactly one intent: HOT (wants the review now, no time locked), BOOKED (a time is confirmed), LATER (not this month, no opt-out), OPT_OUT (STOP, UNSUBSCRIBE, never contact me). OPT_OUT beats everything. If you are not confident, choose the safer class. Never invent a next action that promises a rate or a refinance. Return ONLY JSON: intent, confidence, summary, suggested_next_action, sentiment.

Connect, test, turn on

Sign in to your CRM, OpenAI, mailbox, and SMS if you use it. Retell is only for the AI phone call. You can leave that off.

If the first module is HubSpot and you are not on HubSpot, swap it for your CRM or the Google Sheet. The rest of the chain stays.

Add yourself as a contact. Set tbt_review_due_on to today and tbt_review_state to due. Run once. You should get a review email written to you. Reply STOP and confirm you are marked opt_out.

First week: fifteen clients a day. Then open it up. You only get pinged for HOT and BOOKED.

What the AI must never say

No rates. No “you should refinance”. No credit assistance. No promised outcome. No fake urgency. Every email and SMS must carry an opt-out. Existing clients you already settled only. Not a purchased list. Not dead enquiries.

Stuck?

Email matt@thebrokertimes.com.au. Tell us which CRM and whether you are on Make or Zapier. 30-day money-back: you keep the files.

The Broker Times · The AI Annual Review Engine v1.1 · \$49 AUD once. This is not legal advice. Spam Act, Privacy Act and Do Not Call still apply. Your database, your licence.