

Lineage Sales Competition - Round 1 Case

Background on Lineage:

Lineage is a turnkey real estate investment company that helps individuals build passive income streams through rental properties in carefully selected high-growth U.S. markets. They provide a full-service solution—from market research, property selection, financing, and purchase, to property management. The company prides itself on building long-term wealth for its investors without the traditional headaches of real estate ownership.

Since its founding, Lineage has facilitated nearly \$1 billion in real estate transactions and has built a reputation as a trusted advisor for both new and experienced investors.

Learn more at: <https://lineage.finance/>

The brokerage arm is RPC Invest. Learn more at: <https://rpcinvest.com/>

Your Role:

You are an Account Executive at Lineage. Your job is to help qualified leads build wealth by purchasing turnkey rental properties that generate passive income, tax benefits, and long-term equity growth. Part of your daily routine is prospecting through the CRM to identify high potential leads who may be slipping through the cracks.

While reviewing the CRM, you notice David Butler, a prospect who has been in the system for two years without moving forward on a property. Upon digging deeper into his profile, you see he's engaged with webinars and has expressed interest in building passive income but has not been contacted in over six months.

You decide this is a prime opportunity to re-engage David by personalizing your outreach, addressing his concerns, and showing him why now is the perfect time to take the first step in his investment journey with Lineage.

Your goal: Secure a meeting with David and restart the conversation about how Lineage can help him build long-term wealth through turnkey real estate investments.

The Prospect:

- **Name:** David Butler
- **Occupation:** Mid-level Software Engineer
- **Age:** 38

- **Location:** Austin, TX
 - **Annual Income:** \$140,000
 - **Liquid Assets Available for Investment:** \$100,000
 - **Last Interaction:** 6 months ago, attended a webinar on "Building Wealth Through Turnkey Rentals"
 - **Previous Objections:**
 - Concerned about investing outside of Texas (prefers local investments but has yet to find opportunities that fit his criteria)
 - Expressed uncertainty about the stability of rental income in out-of-state markets
 - Busy professional, limited time to research opportunities or manage properties
 - **Life Update:** Recently got married and is thinking more seriously about long-term financial security. Has shown interest in creating passive income streams to prepare for starting a family.
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Key Points to Leverage:

- Lineage has vetted teams in every market that handle everything from tenant placement to property management
 - David can expect cash-flowing properties that align with his risk tolerance and financial goals
 - Many of Lineage's clients are busy professionals just like David, relying on Lineage's proven systems to build passive income
 - Markets Lineage recommends are carefully selected for stability, job growth, and population increases, which support long-term rental demand
 - Interest rates and housing prices may create a limited-time window for advantageous deals
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Round 1 Deliverable

Your goal is to **secure a meeting** with David Butler. In this round, you will submit:

1. **Cold Email** (target length: 100-150 words, can be less)
2. **1-Minute Video Pitch** (personalized, engaging, and focused on value)

Both assets should be aimed at driving David to schedule a follow-up call with you to explore a specific property opportunity or investment strategy.

Cold Email Framework Tips

Subject Line

- Make it relevant, clear, and personalized

Opening Line

- Reference something personal or timely

Value Proposition

- Address his concerns and highlight a key benefit

Call to Action

- Make it easy and specific
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1-Minute Video Pitch Tips

Script Structure (The 3 P's):

1. **Personalization**
2. **Pain + Possibility**
3. **Promise + CTA (Call to Action)**

Pro Tips:

- Speak clearly and confidently
 - Smile, maintain eye contact
 - Keep it conversational (not scripted word-for-word)
 - Film in a well-lit, professional environment
 - End with a clear CTA and include a scheduling link
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Judging Criteria for Round 1:

- Personalization and relevance
- Clear articulation of value
- Professional delivery (tone, video quality, grammar)
- Strong call to action
- Creativity and engagement

You will send your cold email and 1-minute pitch to cboy@salesplaypros.com