

OPERATOR PLAYBOOK · APEX 2.0 · BEGINNER'S GUIDE

Getting Started with Apex 2.0.

The complete beginner's guide to your AI voice agent — the assistant that answers every seller call, qualifies live, books the appointment on your Google Calendar, and auto-advances the pipeline while you're at dinner. Twenty-four pages. Zero code. All you.

UPDATED JULY 2026 · INBOUND · BOOKING · AUTO-STAGE · DORMANCY DIALER

TABLE OF CONTENTS

What's in this guide.

01	Meet Apex 2.0 — the 30-second version	p. 03
02	The 5 phases of a perfect Apex call	p. 05
03	Before you flip the switch — prerequisites	p. 07
04	15-minute setup walkthrough	p. 09
05	Anatomy of your first Apex call	p. 13
06	Reading + reviewing Apex transcripts	p. 16
07	Dormancy Sweep — outbound follow-up dialing	p. 18
08	What Apex will NEVER do (safety + boundaries)	p. 20
09	Troubleshooting FAQ	p. 21
10	Your 7-day mastery plan	p. 23

Your AI setter — never sleeps, never misses.

Every wholesaler loses deals to one thing: **slow callbacks**. A motivated seller calls at 9 PM. You're at dinner, in the shower, or already asleep. By the time you dial back Wednesday morning, they've talked to two competitors and picked whoever answered first. Apex 2.0 is the fix.

The 30-second definition: Apex is an AI assistant that answers your Twilio phone number 24/7. When a seller calls, Apex picks up on the first ring, holds a natural conversation, qualifies them across the four wholesale pillars (motivation, timeline, price, condition), offers three appointment slots from your Google Calendar, books whichever they pick, texts them a confirmation, and auto-advances the lead in your pipeline. All before you finish your pasta.

WHY THIS MATTERS — THE MATH

Industry averages: only **27% of inbound seller calls** are returned within an hour. Only **4% within five minutes**. Yet the seller who signs the contract is the one who returns fastest in **78% of deals**. Apex reduces your response time from 'sometime tomorrow morning' to **zero seconds** — every call, every night, every weekend.

The 6 jobs that used to steal your evenings.

Before Apex, every one of these was on your plate. After Apex, not a single one of them touches your calendar again.

1

Picking up the phone at 9 PM

Apex answers. First ring. Twenty-four seven.

2

Calling sellers back the next morning

Apex handles it in real time — no callback needed.

3

Writing down what the seller said

Apex captures the full transcript automatically. Searchable, timestamped, tied to the lead.

4

Manually moving the lead card in the pipeline

Apex reads the transcript with Claude and drags the card from 'New Lead' → 'Hot — Buyer Interested' when it should move.

5

Scheduling the walk-through call

Apex checks your Google Calendar, offers three slots, books whichever the seller picks.

6

Remembering to follow up 30 days later

Apex dials cold leads back automatically after 7 days of silence (you set the number).

A perfect Apex call, step by step.

Think of Apex like a really good employee. Here's what they do, in the exact order it happens on every call.

1

ANSWER

Apex picks up your Twilio number 24/7. Natural greeting — no IVR, no 'press 1 for sales.' If the seller has called before, Apex greets them by property address.

2

QUALIFY

Runs the discovery script — motivation, timeline, price, condition. Every answer captured live into the lead's qualifier slots.

3

BOOK

Checks your Google Calendar. Offers three open slots. Confirms one. Fires a text + calendar invite to the seller in under two minutes.

4

AUTO-STAGE

Claude reads the transcript and moves the lead card from 'New Lead' to 'Hot — Buyer Interested' the moment qualification checks out. No drag-and-drop.

5

RE-ENGAGE

For every lead that goes dormant (default 7 days, configurable), Apex dials them back to check in. Backoff retries (1d → 3d → 7d), max 3 attempts.

A single Apex call, minute by minute.

This is what an actual Apex conversation looks like from your vantage point. Sarah calls at 9:47 PM Tuesday. You're at dinner. None of this touches your phone.

9:47:00 PM	Sarah dials your direct-mail number.
9:47:03 PM	Apex picks up. <i>'Hi, this is Apex from iSpeedToClose — I saw you called about a property?'</i>
9:47-9:51 PM	Apex qualifies. Sarah shares: inherited house · 8-week timeline · \$180K · rough condition.
9:51:15 PM	Apex checks your Google Calendar. Offers Tue 10 AM, Wed 2 PM, Thu 11 AM.
9:51:40 PM	Sarah picks Tue 10 AM.
9:51:50 PM	Text + calendar invite go out. Slot booked.
9:52:10 PM	Lead card slides on the Kanban: New Lead → Hot — Buyer Interested.
Wed 7:00 AM	You wake up. Sarah's card is at the top of the Hot column. Everything's ready.

The 4 things you need first.

Apex needs four working ingredients. Two you already have if you're on the Pro tier. Two take about 10 minutes to set up.

1

A Pro-tier iSpeedToClose subscription (\$197/mo)

Apex 2.0 inbound + auto-stage is bundled on the Pro tier and above. Outbound dormancy dialing is Team tier (\$397/mo). Basic tier does NOT include Apex.

2

A Twilio account with one purchased phone number

Cost: about \$1.15/month per number + ~\$0.013/minute for calls. Sign up at [twilio.com](https://www.twilio.com) — free trial covers your first ~\$15 of usage. Copy your Account SID + Auth Token into Settings → Integrations.

3

A Google account with Google Calendar

Any Gmail / Google Workspace account works. When you enable booking, you'll authorize iSpeedToClose to READ your free/busy times and CREATE appointment events. No email or drive access is requested.

4

A quiet moment to configure the settings

Sit down for 15 minutes with a coffee. Once configured, you'll never touch these settings again unless you want to.

Real numbers. No surprises.

Apex is bundled into the Pro tier — but you pay Twilio directly for the phone number + call minutes. Here's a realistic monthly estimate for a wholesaler doing 200 inbound calls per month.

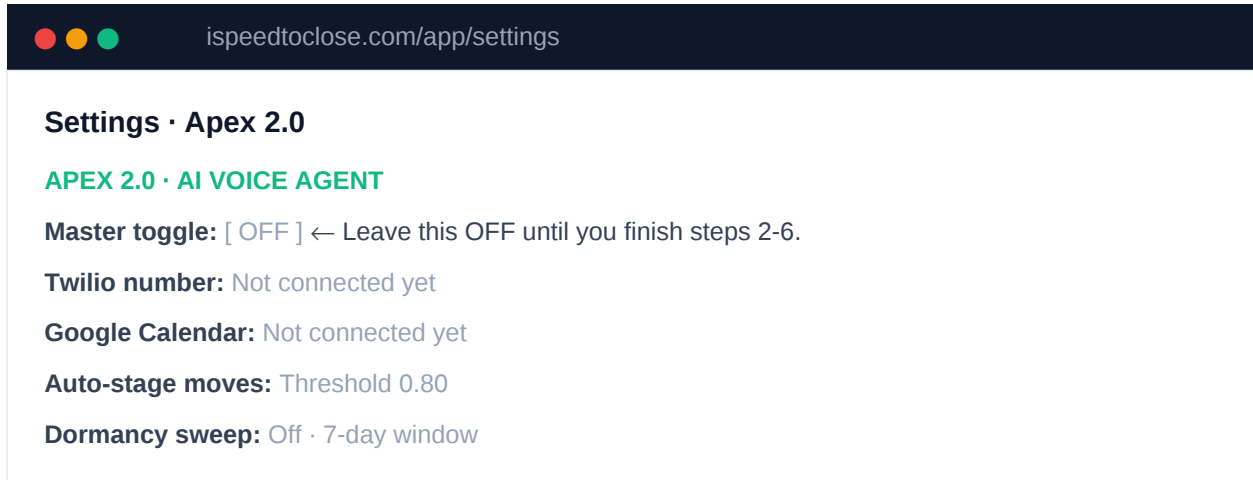
iSpeedToClose Pro tier	\$197.00 / month
Twilio phone number	\$1.15 / month
Twilio inbound minutes	$\sim \$0.013 \times \sim 4 \text{ min avg} \times 200 \text{ calls} = \mathbf{\$10.40}$
Total monthly	$\approx \mathbf{\$208.55}$
Cost per handled call	$\approx \$1.04$
Cost per Apex-booked appt	$\approx \$4\text{-}6$ (based on typical 20% qualification rate)

WHAT NOT TO DO

Do NOT buy multiple Twilio numbers unless you're running multiple direct-mail campaigns needing separate tracking. One number can handle unlimited concurrent calls thanks to Twilio's auto-scaling — Apex will pick up parallel inbound calls without breaking a sweat.

Step 1 of 6 — Open the Apex card.

Log in and click the Settings gear in the left sidebar. Scroll down until you see the emerald-outlined Apex 2.0 card.



WHY LEAVE THE MASTER TOGGLE OFF FOR NOW

You don't want Apex answering real seller calls until you've finished configuring the calendar and outbound settings. Keep it off for the next 4 steps — you'll flip it on at Step 6.

Step 2 of 6 — Connect Twilio.

Go to [twilio.com](https://www.twilio.com), sign in, and grab three things from your Twilio console. Then paste them into iSpeedToClose.

A

Copy your Account SID

Twilio Console → Account → 'Account SID' field. Starts with 'AC...' followed by 32 characters.

B

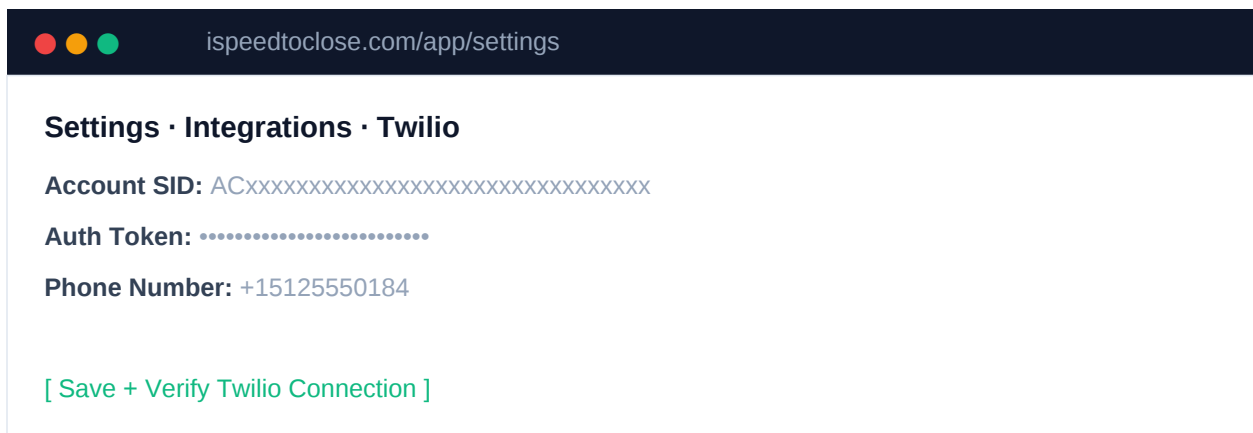
Copy your Auth Token

Same page, right below Account SID. Click the eye icon to reveal it. Copy the full string.

C

Copy your Twilio phone number

Twilio Console → Phone Numbers → Active Numbers → click the number → copy in +1XXXXXXXXXX format.



The screenshot shows a web browser window with the address bar displaying 'ispeedtoclose.com/app/settings'. The page content is titled 'Settings • Integrations • Twilio'. It contains three input fields: 'Account SID' with a placeholder 'ACxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx', 'Auth Token' with a placeholder of dots, and 'Phone Number' with the value '+15125550184'. Below these fields is a green button labeled '[Save + Verify Twilio Connection]'.

VERIFICATION IS IMPORTANT

Clicking Verify makes a live test call FROM Twilio TO iSpeedToClose. If you don't see a green ✓ within 10 seconds, your credentials are wrong or your Twilio number isn't provisioned. Fix before proceeding.

Step 3 of 6 — Connect Google Calendar.

This is the OAuth step that lets Apex offer real appointment slots from YOUR calendar. Two clicks. iSpeedToClose only requests free/busy read + event create — never inbox or drive.

A

Click the 'Connect Google Calendar' button

You'll be redirected to Google's authorization screen — this is Google's page, not ours.

B

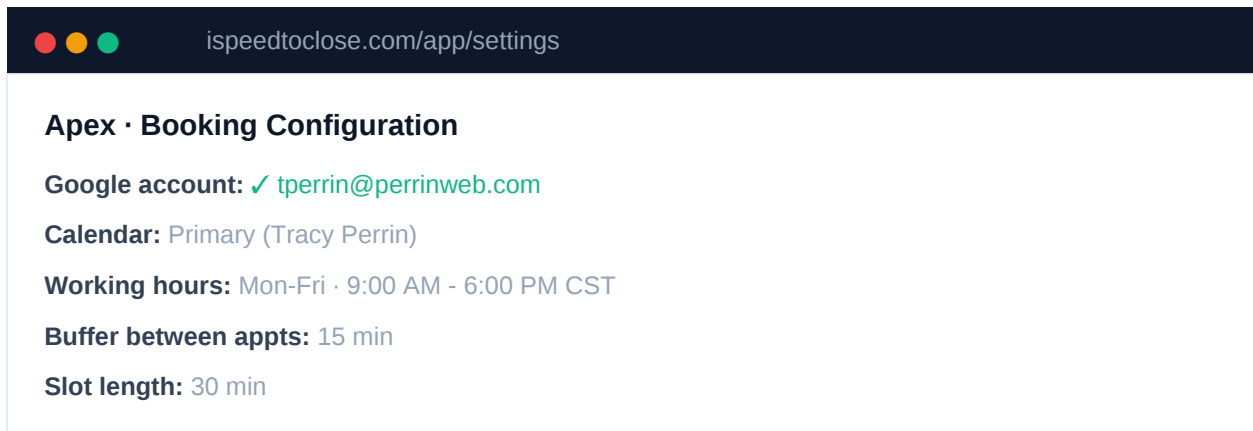
Pick which calendar Apex should look at

Most users pick their primary personal calendar. If you keep work on a separate calendar, choose that.

C

Set your working hours + timezone

Apex will ONLY offer slots during these hours. Default: Mon-Fri 9 AM to 6 PM local. Weekends and evenings respected unless you explicitly enable them.



Steps 4-6 — Final tuning.

4

Set your auto-stage confidence threshold

Default: 0.80 (recommended). Leads with a Claude confidence score below this stay in 'New Lead' for your manual review. Higher = more conservative auto-moves. Lower = more aggressive.

5

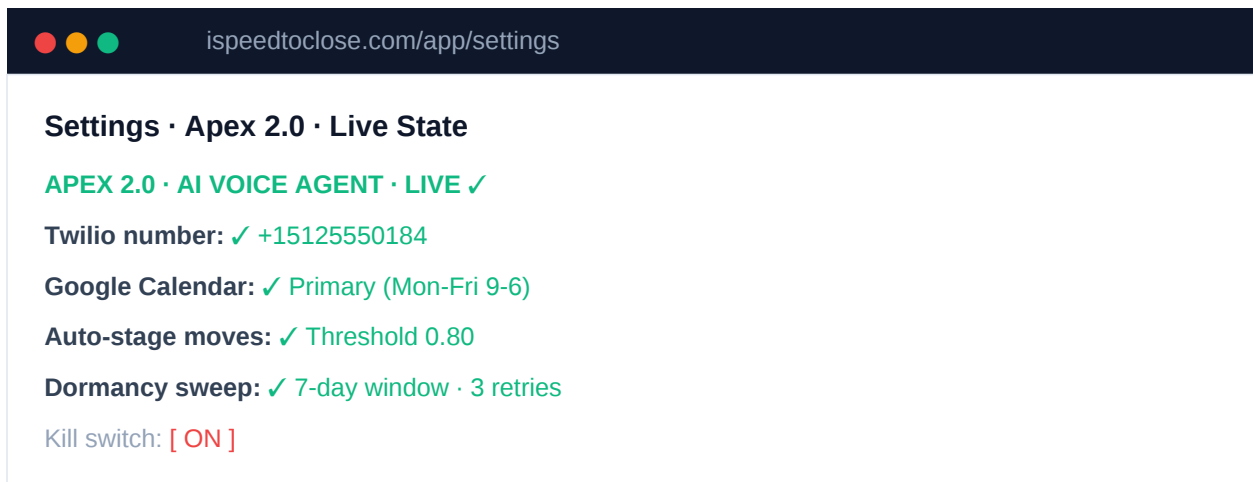
Configure the dormancy sweep (optional but recommended)

Toggle it ON. Set the window: 7 days is standard. Set max retries to 3 (1 day → 3 days → 7 days backoff).

6

Flip the master Apex toggle to ON

Congrats — Apex is now answering every inbound call on your Twilio number. From this moment forward, no seller call gets missed. Ever.



The screenshot shows a web browser window with the address bar displaying "ispeedtoclose.com/app/settings". The page content is titled "Settings • Apex 2.0 • Live State". Below the title, there are several status indicators, each with a green checkmark: "APEX 2.0 • AI VOICE AGENT • LIVE", "Twilio number: +15125550184", "Google Calendar: Primary (Mon-Fri 9-6)", "Auto-stage moves: Threshold 0.80", and "Dormancy sweep: 7-day window • 3 retries". At the bottom, there is a "Kill switch" toggle set to "ON" in red text.

ispeedtoclose.com/app/settings

Settings • Apex 2.0 • Live State

APEX 2.0 • AI VOICE AGENT • LIVE ✓

Twilio number: ✓ +15125550184

Google Calendar: ✓ Primary (Mon-Fri 9-6)

Auto-stage moves: ✓ Threshold 0.80

Dormancy sweep: ✓ 7-day window • 3 retries

Kill switch: [ON]

What happens in the 3 minutes after a seller dials.

Here's a real transcript of an inbound seller call handled entirely by Apex. Everything you're reading here was captured and stored automatically in the lead's file.

■ **APEX** Hi, this is Apex from iSpeedToClose — I saw you called about a property?

■ **SELLER** Yeah, this is Sarah. I got your card in the mail about 4521 Cedar Lane.

■ **APEX** Great, thanks for calling back. Is that the property you're looking to sell?

■ **SELLER** Yes. My mom passed in March. I inherited it. House is pretty rough.

■ **APEX** Sorry for your loss. Can I ask — what's your timeline for selling?

■ **SELLER** Honestly, I'd love to be done by end of summer. Maybe eight weeks?

■ **APEX** Understood. And do you have a rough price you're looking for?

■ **SELLER** I'd take \$180,000 if it means a fast, clean cash close. No repairs.

The booking + hand-off.

■ **APEX** That's very reasonable. Let me check the calendar — Tuesday at 10 AM works for a virtual walk-through with our acquisitions team?

■ **SELLER** Yes, Tuesday at 10 works.

■ **APEX** Perfect, Sarah. You'll get a text and calendar invite in the next two minutes. Talk to you Tuesday.

What Apex captured, automatically:

Motivation	Inherited from mother
Timeline	8 weeks
Price target	\$180,000
Condition	Rough — needs cosmetic + roof
Appointment	Tuesday 10:00 AM CST
Auto-stage move	New Lead → Hot — Buyer Interested
Confidence	0.92 (well above 0.80 threshold)

Every Apex call surfaces in 3 places.

1

Lead Detail page

Open the lead card (Sarah Henderson) — scroll down and you'll see three new panels: Apex Call transcript, Upcoming Appointments, and the auto-stage-move audit trail.

2

Pipeline Kanban

Sarah's card is now in the 'Hot — Buyer Interested' column with a small emerald ✓ badge indicating 'Apex-advanced' (hover to see the reason).

3

Dashboard • Morning Brief

Your Friday 'Wins This Week' email will count Sarah as one appointment booked + one auto-advance.

Reading Apex's work — the 5-minute daily habit.

Apex is 92% accurate on hot/cold classification — but you're the closer. Reviewing transcripts every morning takes 5-10 minutes and does three things: catches the rare miss, teaches you what objections your sellers are throwing, and lets you prep for the walk-throughs Apex booked.

1

Open `/app/admin/apex-calls` (admin) or the Lead Detail page

The Apex Calls admin view lists every call in the last 30 days with a snippet of the transcript + Apex's confidence score + the auto-stage decision.

2

Look for the 3 red flags

(a) Confidence below 0.60 (Apex was uncertain), (b) 'Missed slot' warning (Apex couldn't extract one of the 4 pillars), (c) 'Seller confused' flag (they asked Apex a question it couldn't answer).

3

Drag the card back if you disagree

If Apex advanced a lead to Hot that you think is Cold, drag it back on the Kanban. Your correction is logged and Apex's future decisions get slightly more conservative in that direction.

How Apex scores each call.

Apex uses the same 4-pillar rubric every seasoned wholesaler uses. Understanding the rubric = understanding why Apex made the calls it made.

Motivation	Why is the seller selling? Divorce, probate, foreclosure, out-of-state, tired landlord = strong. 'Just curious' = weak.
Timeline	How fast do they need to be out? 8 weeks or less = hot. 'Someday next year' = cold.
Price	Do they have a number? Is it below ARV × 70%? Anchored high = weak. Anchored low or 'whatever's fair' = strong.
Condition	Rehab needed? Cosmetic vs structural? Occupied vs vacant? Impacts your repair estimate + close speed.

THE 0.80 CONFIDENCE RULE OF THUMB

If Apex hits 3 out of 4 pillars with clarity, confidence lands around 0.85. If motivation is fuzzy but the other 3 are clear, you get 0.70-0.78. If two pillars are missing, confidence drops below 0.60 and Apex does NOT auto-advance — the lead stays in New Lead awaiting your judgment.

The killer feature — Apex calls cold leads back.

This is where Apex separates itself from any other AI phone agent. It doesn't just answer new calls — it dials back sellers who went quiet. The single biggest source of found revenue for most wholesalers is leads they thought were dead.

1

How it detects a dormant lead

Every 30 minutes, Apex scans every lead not in 'Closed' or 'Dead' status. If the last SMS reply / call / touch was more than your dormancy window (default 7 days) ago, the lead qualifies.

2

How it decides to dial

Apex checks TCPA compliance (DNC list, quiet hours, state-level rules) BEFORE dialing. A positive DNC hit hard-blocks the call. State prohibitions respected in real time.

3

The retry cadence

First attempt right away. If no answer, retry in 1 day. If still no answer, retry in 3 days. If still nothing, retry in 7 days. After the third failed attempt, Apex quietly closes the loop and marks the lead 'unreachable'.

4

Manual re-engage from the Lead card

On any lead detail page, the 'Re-engage now' button queues an immediate Apex outbound call, bypassing the dormancy timer. Use for when the seller says they'll 'think about it and call back.'

Real numbers from the field.

Leads Apex re-dials	Typically 20-30% of your total pipeline (the dormant tail)
Answer rate on retry	≈ 18% (industry-standard cold-callback rate)
Qualification rate on ans.	≈ 30% (they answered because their situation changed)
Appointment book rate	≈ 22% of qualified
Net effect	≈ 1 extra deal per 10-15 dormant leads swept — pure recovered revenue

COMPLIANCE IS BUILT IN

Apex re-checks the DNC list, quiet hours, and state-level do-not-call rules in real time BEFORE every outbound dial. A positive hit blocks the call and logs the block reason. You have a full audit trail if you're ever asked to prove compliance in a TCPA challenge.

The safety rails you can trust.

This is the most important page in this ebook. If a customer or a compliance officer asks 'what won't the AI do?' — this is your answer.

APEX WILL NEVER

- Make offers ("We'll pay you \$180,000")
- Quote prices or price ranges
- Promise closing dates
- Negotiate on your behalf
- Sign contracts or agreements
- Discuss legal terms (assignment fees, EMD, title)
- Speak on behalf of your acquisitions team
- Call outside your configured working hours

The 'so what will you pay me?' escape line:

APEX'S RESPONSE, VERBATIM

"That's exactly what my acquisitions team will cover on Tuesday. I want to make sure they see the property first so they can put together a real, fair offer for you."

The 10 questions every new user asks.

Q: Will it sound like a robot?

A: No. Apex uses Anthropic's Claude 4.6 — the current gold standard for natural voice conversation. Sellers usually don't realize it's an AI until you tell them (which you don't have to).

Q: What if the seller wants to talk to a human?

A: Apex politely says: 'Absolutely — my acquisitions team will call you at [booked slot].' It never insists on staying on the line.

Q: Can I listen to the audio recording?

A: Yes. Every Apex call is recorded via Twilio + stored for 30 days. Playback is on the Lead Detail page → Apex Call panel.

Q: What if two sellers call at the exact same time?

A: Twilio + Apex handle unlimited concurrent inbound calls. Both sellers get answered instantly.

Q: Will Apex answer my personal calls if they come to that number?

A: Yes — Apex answers ALL calls to the configured Twilio number. Do NOT use your personal cell number as the Twilio number.

CHAPTER 09 · TROUBLESHOOTING (cont'd)

Q: What if I want Apex to only answer some numbers?

A: Configure the routing at the Twilio Studio level — advanced feature. Reach out to support@ispeedtoclose.com and we'll help.

Q: Can I customize the greeting?

A: Yes — Settings → Apex → Greeting override. Keep it under 80 characters. Apex still runs the qualification script after the custom greeting.

Q: What if Apex mis-hears the seller's address?

A: Apex confirms every address back to the seller. If the seller corrects it, Apex captures the correction. If they don't notice — very rare — you can edit on the Lead Detail page.

Q: How do I turn Apex off temporarily?

A: The master toggle in Settings → Apex → OFF. Immediate. All future calls go to your normal Twilio voicemail until you flip it back on.

Q: Does Apex work internationally?

A: US and Canada only for now. State-level DNC and TCPA compliance is built in for all 50 US states + all Canadian provinces.

A week to go from 'nervous' to 'never turning it off.'

Follow this exact plan for the next 7 days and you'll know Apex cold. No jargon, no guessing. Each day is 15 minutes or less.

Day 1

Complete setup

Complete the 15-minute setup in Chapter 04. Flip the master toggle ON. Make a test call to your Twilio number from your cell — hear Apex live.

Day 2

Review + tune

Review the transcript from your test call. Check that Apex captured the four pillar slots. Play with the confidence threshold slider to see how it changes auto-stage behavior.

Day 3

Turn on Dormancy

Turn on the Dormancy Sweep. Set it to 7 days. Let it run overnight. Tomorrow morning, count how many dormant leads it dialed.

Day 4

Show 3 friends

Reach out to 3 wholesaler friends who don't have Apex. Show them your dashboard. Watch their eyes when they see the transcripts.

Day 5

Record the demo

Record the 45-second demo video with the Recording Studio card in your Admin panel. Ship it above the Apex 2.0 landing showcase.

Day 6

Master the rubric

Read Chapter 06 again. Practice reading a transcript in under 60 seconds. Speed compounds over 20 calls/day.

Day 7

Close the loop

Send Sarah a personal follow-up text: 'Hey — Tracy here. Looking forward to Tuesday's walk-through. Anything I should know?' Apex handed you the ball. Go score.

YOU'VE GOT THIS.

Apex is the setter. You are the closer.

Every seller call you would have missed is now handled. Every qualifier slot is filled before you read the lead. Every appointment is on your calendar before you wake up. Every dormant lead gets a second shot without you touching a phone.

You didn't build this because you needed a demo video. You built this because it changes wholesaling. Now go tell people about it.

iSpeedToClose · Apex 2.0

Support: support@ispeedtoclose.com

Web: ispeedtoclose.com

Your next reads

You just finished a piece of the playbook. Here are the next three books in the Library — each one hand-picked to build on what you just learned.

01 The 60-Second Seller Call

The Call Coach rubric plus two annotated transcripts.

25 pages · Read at <https://ispeedtoclose.com/ebook>

02 The 25 Seller Objections Playbook

The 25 objections you hear most — with 3 scripts each.

25 pages · Read at <https://ispeedtoclose.com/seller-objections>

03 Getting Started with iSpeedToClose

The full platform tour — every module explained.

24 pages · Read at <https://ispeedtoclose.com/start>

All 12 books are free. Grab any of them at ispeedtoclose.com/library.

READY TO PUT THIS PLAYBOOK TO WORK?

Close more deals. Save time. Grow faster.



Speed is the Deal

**CLOSE MORE DEALS.
SAVE TIME. GROW FASTER.**



THE **ALL-IN-ONE** PLATFORM FOR
REAL ESTATE WHOLESALERS AND INVESTORS!



FIND DEALS
Discover off-market
opportunities fast.



CONNECT
Build your buyers
list & network.



NEGOTIATE
Run comps, offers &
analyze in seconds.



CLOSE
Streamline your process
and close with confidence.



SAVE TIME
Automate your workflow.



CLOSE WITH CONFIDENCE
Make smarter decisions.



GROW YOUR BUSINESS
More deals. More profit.



SPEED IS THE DEAL

★ **EVERYTHING WHOLESALERS NEED · ONE LOGIN** ★

AI Deal Analyzer

Cash-Buyer CRM

Off-Market Discover

Auto SMS + Voice

Start Your Free 14-Day Trial

ispeedtoclose.com

297 PAGES OF FIELD-TESTED PLAYBOOKS + TOOLS INSIDE THE APP

Built by an active wholesaler for active wholesalers · Free 14-day trial · Cancel anytime

Speed is the Deal · The all-in-one platform for wholesalers & investors

© iSpeedToClose · Perrin Properties, LLC