



# PROSPECTING RESOURCES

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# CHAPTER 1

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# SKILL LEVEL, FREQUENCY, & NUMBER OF CONTACTS

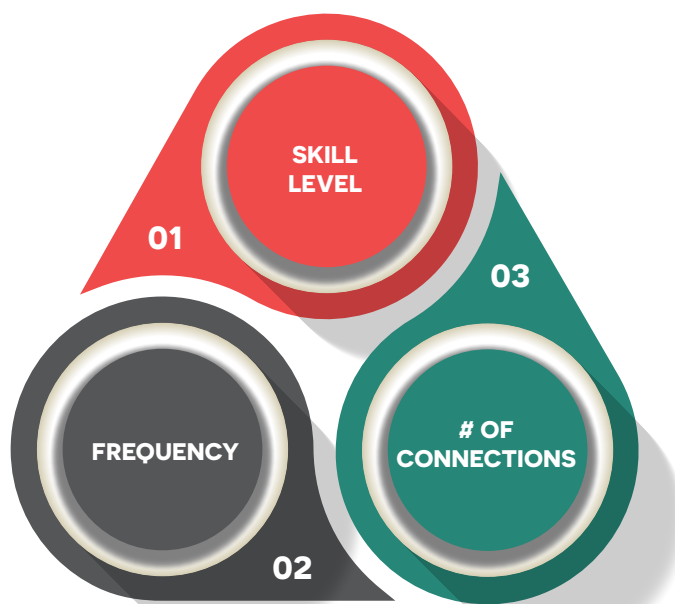
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**FREQUENCY**

**SKILL  
LEVEL**

**# OF  
CONNECTIONS**



## EXERCISE: CONTACT COUNT

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Try this quick exercise: check your Facebook and LinkedIn pages. How many connections do you have? How many followers do you have on Twitter and Instagram? Write the numbers below and add them up:

Facebook \_\_\_\_\_

LinkedIn \_\_\_\_\_

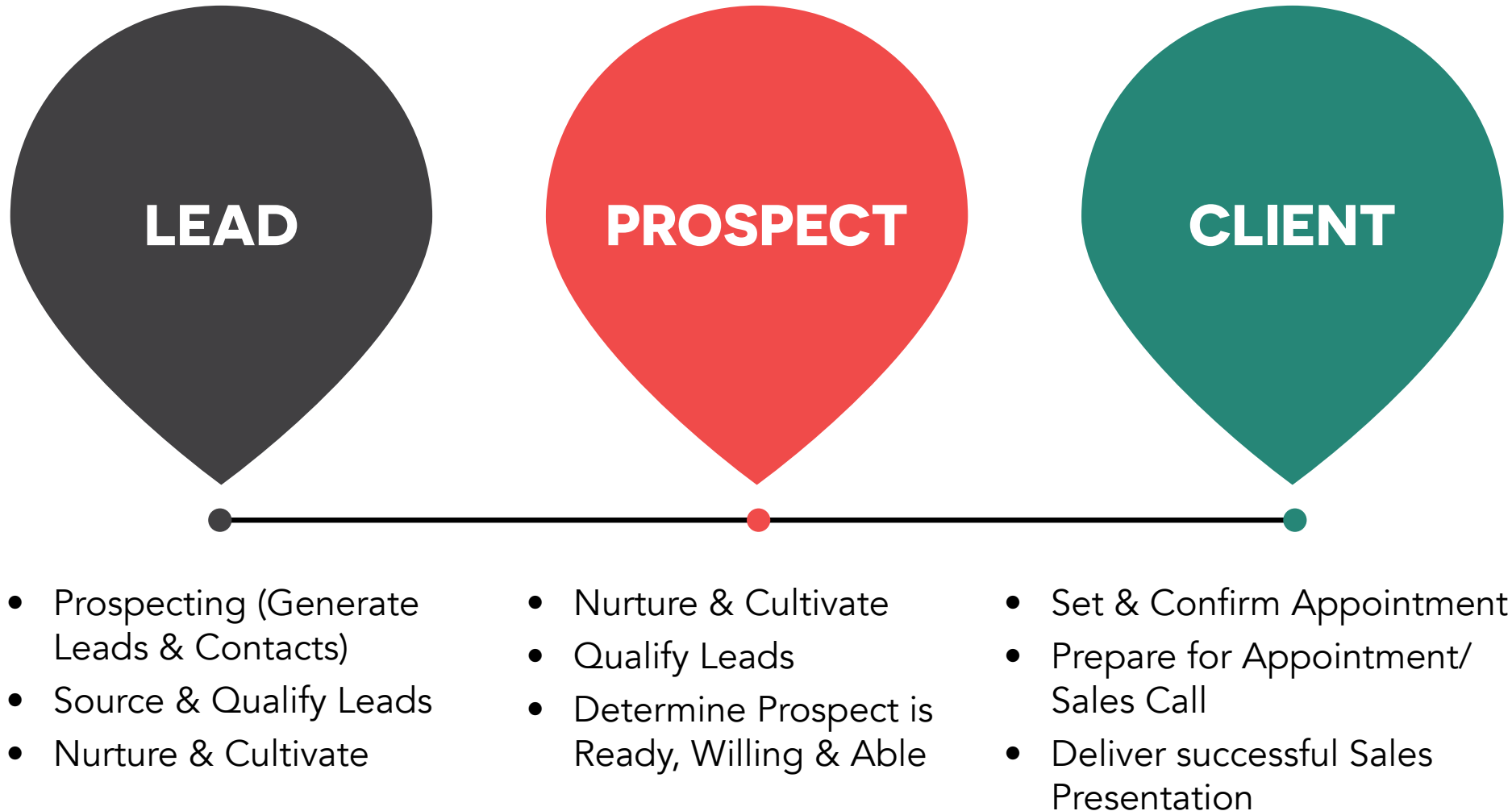
Twitter \_\_\_\_\_

Instagram \_\_\_\_\_

TOTAL \_\_\_\_\_

## LEAD / PROSPECT / CLIENT

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# READY? WILLING? ABLE?



## READY?

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- Is the prospect truly ready to buy or sell?
- Are they expressing doubts or raising objections?
- Is something preventing them from moving forward?



## WILLING?

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- Is the prospect eager, engaged, and excited?
- Is the prospect willing but under pressure or held back by an unwilling partner or spouse?
- Is there a clear expectation agreed to that they will take action?



## ABLE?

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- Does the prospect have funds to purchase?
- Are they prequalified or preapproved to obtain financing from a lender?
- Are they unable to buy or sell for any other financial or legal reason?

# 6 THINGS “NO” MEANS





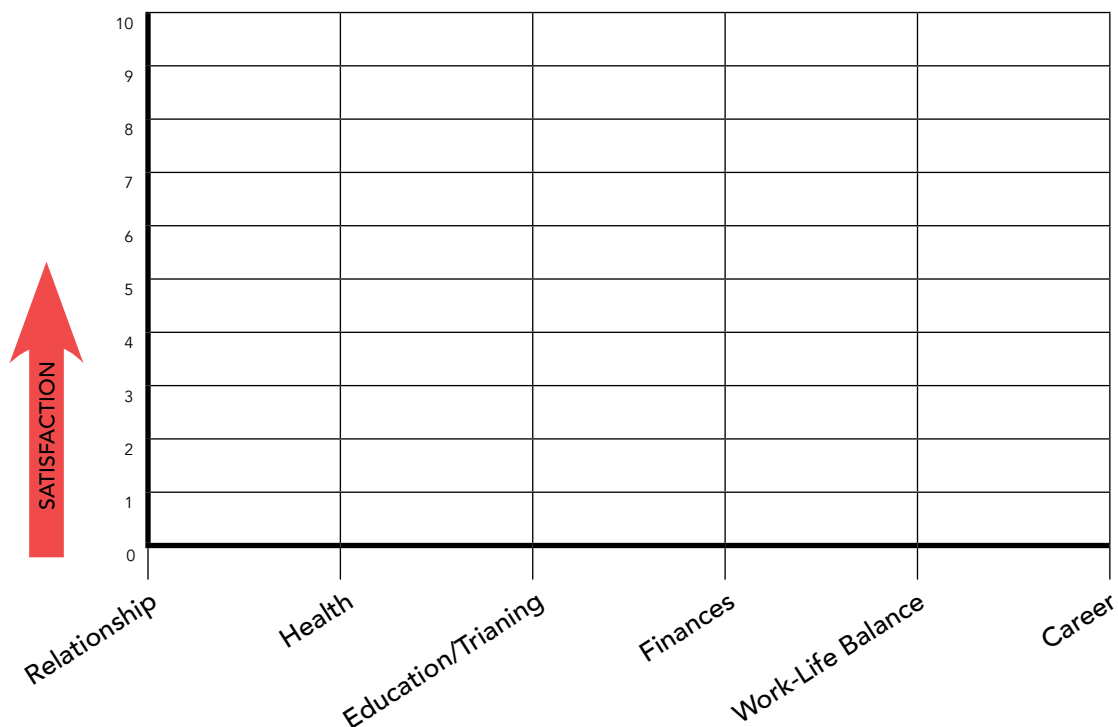
## EXERCISE: MAP IT!

Take a few minutes to complete the **Attitudinal Energy Level** Chart below. This exercise maps your work-life balance and takes a personal inventory of your life through 6 different lenses: Relationships, Health, Education/Training, Finances, Work-Life Balance, and Career.

Mark your satisfaction level in each of these areas. On this scale, '10' indicates the highest level of satisfaction and '1' indicates a low level of satisfaction.

- How would you rate your relationships? Relationships can include your friends and family as well as personal relationships with your spouse or partner.
- How is your health and wellness? Health includes your fitness and diet as well as your mental and spiritual health.
- What about your education and training? How are you doing with increasing your knowledge and developing the skills you need to succeed in your career?
- How are your personal finances? What is your level of debt? Are you saving money? How is retirement looking?
- How would you rate your work-life balance? Are you spending enough time at home with your family? Do you have time for hobbies and pursuits outside of work?
- Where do you think you are in your career? Are you satisfied with your career? How would you rate your attitudinal energy level when looking at your life through this lens?

**Attitudinal Energy Levels**



## EXERCISE: MAP IT! (CONTINUED)

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*How Did You Do?*

- Which area is your lowest?

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- Which area is your highest?

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- Which area would you most like to work on?

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- If a friend or family member were asked about your levels, would the numbers change?

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# 10 HABITS TO IMPROVE POSITIVE ENERGY

10	<b>Know When To Say "No"</b> to something without the feeling of loss.
09	<b>Accept Your Faults And Mistakes,</b> and own them candidly.
08	<b>Build People Up In A Genuine Way.</b> Reframe faults into opportunity.
07	<b>Empathize And Forgive,</b> even when no one's watching.
06	<b>Avoid Complaining.</b> It's bad marketing for your voice.
05	<b>Recognize What's In—And Out Of—Your Control.</b> Literally write it down.
04	<b>Smile. Wave. High Five.</b> <b>Nod. Make Eye Contact</b>
03	<b>Take Care Of Yourself, Physically And Mentally.</b> Get enough sleep. Work out and watch your diet. Be kind to yourself. Avoid self-deprecating, even in jest.
02	<b>Be Genuinely Excited About What You're Doing.</b> If it's repetitive, be resourceful and creative in your work.
⚡ 01	<b>Find The Best In Everyone.</b> Some people hide it well—so keep searching. Asking great questions is the key

# PROPOSED WORK SCHEDULE

Time	Monday	Tuesday	Wednesday	Thursday	Friday	Friday
8:00 AM						
9:00 AM						
10:00 AM						
11:00 AM						
12:00 PM						
1:00 PM						
2:00 PM						
3:00 PM						
4:00 PM						
5:00 PM						

# CHAPTER 2

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Hi, I'm (John Smith) with (ABC Realty), and we just listed a home for sale in your neighborhood on (123 Main Street) for (\$250,000), and we often find that the ultimate buyer of a home is a friend, family member or acquaintance of someone that lives in the same neighborhood. Since we are doing everything we can to sell your neighbor's home, I'd like to ask you if you know anyone looking to move into your community?

Answer: "No".

Great! I truly appreciate your taking the time to try and help. So tell me, when do you plan on moving?

Answer: "No plans".

How long have you lived in your home?

Answer: "5 years".

Where did you live before that?

Answer: "Denver, Colorado".

Excellent! How did you pick this community?

Answer: "To be near family".

Great! So if you were to move, where would you move next?

Answer: "To Florida".

And when would that most likely be?

**If their answer is 6 months or less, continue:**

Did you know that it can take up to 6 months to get a home prepared, marketed and sold in today's market?

Answer: "No".

Great! So do you want your home sold in 6 months, or do you want to start the process of selling then?

Answer: "Sold".

Perfect! All that we need to do to start you on your way to (Florida) is pick a time to get together. How does that sound?

Answer: "Great".

Excellent! Would Wednesday or Thursday at 4:00pm work better for you?

Hi, I'm (John Smith) with (ABC Realty), and we just sold a home for sale in your neighborhood on (123 Main Street) for (\$250,000), and when one neighbor sells a home, typically 2 or 3 more homes in the same neighborhood sell right away. So I was curious as to when you plan on moving?

Answer: "No plans".

Great! How long have you lived in your home?

Answer: "5 years".

Terrific! Where did you live before that?

Answer: "Denver, Colorado".

Excellent! How did you pick this community?

Answer: "To be near family".

Wonderful! So if you were to move, where would you move next?

Answer: "To Florida".

Exciting! And when would that most likely be?

**If their answer is 6 months or less, continue:**

Did you know that it can take up to 6 months to get a home prepared, marketed and sold in today's market?

Answer: "No".

Great! So do you want your home sold in 6 months, or do you want to start the process of selling then?

Answer: "Sold".

Perfect! All that we need to do to start you on your way to (Florida) is pick a time to get together. How does that sound?

Answer: "Great".

Excellent! Would Wednesday or Thursday at 4:00pm work better for you?

Date: \_\_\_\_\_

Name: \_\_\_\_\_ Spouse Name: \_\_\_\_\_

Property Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone #s – Mobile: \_\_\_\_\_ Spouse Mobile: \_\_\_\_\_ Home: \_\_\_\_\_ Work: \_\_\_\_\_

Email: \_\_\_\_\_ Spouse Email: \_\_\_\_\_

Family / Children (include ages): \_\_\_\_\_

1. Have you spoken with any other agents? ☐ Yes ☐ No \_\_\_\_\_
2. Have you considered selling the home yourself? ☐ Yes ☐ No \_\_\_\_\_
3. Why do you want to move? \_\_\_\_\_
4. Do you know where you want to move to? \_\_\_\_\_
5. What date do you want to be moved by? \_\_\_\_\_
6. Are there any negatives to not moving by then? (suggest lifestyle sacrifices, job, costs, schools, family, etc.)  
\_\_\_\_\_
7. Tell me all the negatives of not moving at all? (same suggestions above)  
\_\_\_\_\_
8. Tell me all the benefits of buying a new home: (dig deep & find out WHY?)  
\_\_\_\_\_
9. On a scale of 1 to 10, how would you rank your motivation to move? With 10 being highly motivated: \_\_\_\_\_
10. When did you buy your home? \_\_\_\_\_ What price did you pay? \_\_\_\_\_
11. Do you know how much you still owe on it? \_\_\_\_\_
12. Have you made any major improvements to the home since? ☐ Yes ☐ No  
\_\_\_\_\_
13. Do you happen to have an idea as to what you think it's worth, or should sell for? \_\_\_\_\_
14. Do you have a price you won't sell your home below? \_\_\_\_\_
15. Tell me about the positive & negative features of your home:  
\_\_\_\_\_
16. How many BR: \_\_\_\_\_ Baths: \_\_\_\_\_ SqFt: \_\_\_\_\_ Stories: \_\_\_\_\_ Other: \_\_\_\_\_
17. How did you hear about me/us? \_\_\_\_\_
18. Are you interviewing any other agents? ☐ Yes ☐ No Who? \_\_\_\_\_ When? \_\_\_\_\_
19. "Thank you! The next step is for me to take a quick look at your home and I can answer any other questions you may have. Then you can decide what we do next. How does that sound?" (pause)  
"Great! Does 4:30 tomorrow or 5:00 Wednesday work for you?"

Appointment Date/Time: \_\_\_\_\_

DISC Behavioral Profile: \_\_\_\_\_ Why? \_\_\_\_\_



Date: \_\_\_\_\_ Lead Source: \_\_\_\_\_

Name: \_\_\_\_\_ Spouse Name: \_\_\_\_\_

Property Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone #s – Mobile: \_\_\_\_\_ Spouse Mobile: \_\_\_\_\_ Home: \_\_\_\_\_ Work: \_\_\_\_\_

Email: \_\_\_\_\_ Spouse Email: \_\_\_\_\_

Family / Children (include ages): \_\_\_\_\_

1. Have any other agents shown you homes? ☐ Yes ☐ No  
If Yes, do you have a signed agency agreement? ☐ Yes ☐ No
2. Is anyone buying the home with you? \_\_\_\_\_
3. Are you renting, or do you own a home? ☐ Homeowner ☐ Renter  
a) HOMEOWNER:
  - Do you need to sell your home before you buy? ☐ Yes ☐ No
  - Have you signed a listing agreement to sell your home? ☐ Yes ☐ No
- b) RENTER:
  - When does your lease end? \_\_\_\_\_
4. What date do you want to be moved by? \_\_\_\_\_
5. Are there any negatives to not moving by then? (suggest lifestyle sacrifices, job, costs, schools, family, etc.)  
\_\_\_\_\_
6. Tell me all the benefits of buying a new home: (dig deep & find out WHY?)  
\_\_\_\_\_
7. On a scale of 1 to 10, how would you rank your motivation to move? With 10 meaning you must buy as quickly as possible, and 1 meaning you're not sure you'll really buy anything: \_\_\_\_\_  
• What's missing? What would it take to make you a 10? \_\_\_\_\_
8. Do you know where you want to move to? \_\_\_\_\_
9. Will you be paying cash or getting a mortgage? ☐ Cash ☐ Mortgage
10. Have you been pre-approved by a lender? ☐ Yes ☐ No
11. How much will your down payment be? \_\_\_\_\_
12. What price range are you looking in? \_\_\_\_\_
13. How many BR: \_\_\_\_\_ Baths: \_\_\_\_\_ SqFt: \_\_\_\_\_ Stories: \_\_\_\_\_ Other: \_\_\_\_\_
14. What else are you looking for in a home? \_\_\_\_\_
15. Will anyone else be involved in your home buying decision? \_\_\_\_\_
16. "Thank you! I'd love to help you find your perfect home. All that we need to do is to set an appointment so that I can help you find the home you're looking for. Does 4:30 tomorrow or 5:00 Wednesday work for you?"

If "No" use Seller Lead Sheet.

Appointment Date/Time: \_\_\_\_\_

DISC Behavioral Profile: \_\_\_\_\_ Why? \_\_\_\_\_

# OBJECTION HANDLERS

Objection: "I'm just looking..."

Handler:

- *I understand MR/MRS Prospect, A lot of people, just like you, are coming to our website just looking at homes, but also have some interest in the homes they are looking at.*
- *In fact, we took a look and found most people are between 9 and 18 months away from purchasing their home. So, I'm just curious, if we could wave a magic wand here, when would you like to be in your next home?*

Objection: "I'm just looking..."

Handler:

- *"Of course, MR/MRS Prospect. I understand. I want to assist you in any way I can. May I ask you a few quick questions so that I can help as much as possible in your search"?*

Objection: "I'm just looking..."

Handler:

- *"Got it, and thank you so much for looking here MR/MRS Prospect. I want to make this as painless for you as possible. If I can ask you just a couple of quick questions, I can make this very easy on you."*

Objection: "I'm just looking..."

Handler:

- *MR/MRS Prospect, as you can see, there are a lot of choices on the market. Is there a particular area or neighborhood I can direct you to, so you can look?*
- *There are a few different ways to search for property, you've probably seen a few already! This way you can at least look at the things you want to look at. So tell me, what are a few of the areas you're curious about looking at?*

Objection: "We're all set"

Handler:

- *"I can appreciate that MR/MRS Prospect! Most of the people I speak with are 'all set' and that's why I'm reaching out to you now – I want to give you an option for the next time you're in need of any help. Let me ask you..."*

Objection: "We're all set"

Handler:

- *"MR/MRS Prospect, no problem; in fact it's great to hear that you're on your way already! Let me ask you, the next time you're in need of help or information, what's number one on your wish list?"*

Objection: "We're all set"

Handler:

- *"I understand – I didn't expect to catch you in the market right now. MR/MRS Prospect, instead, let me get an idea of your perfect home, and then I'll send you some choices you can keep on file for the next time you're searching. In fact, if you'd like, I can tailor an automatic search to give you a head start! So, tell me..."*

Objection: "We're all set"

Handler:

- *"I can appreciate that MR/MRS Prospect, our best prepped clients are usually 9-12 months away for a firmer relationship. Let me ask you, when is your next buying season for this?"*

Objection: "We're all set"

Handler:

- *"That's fine, MR/MRS Prospect I totally understand. And let me ask you – the next time you're in the market for this, how many agents are you going to reach out to, or is this the first step you've taken?"*

Objection: "Let me think about it..."

Handler:

- *MR/MRS Prospect, whenever I tell someone I need to think about it, I usually mean one of three things: 1 - I'm not going to be a deal for whatever reason and I just want to get them off the phone, 2 - I kind of like the idea but I'm going to have to find the money or talk to my partner, or something else is holding me back, or 3 - I really like the idea and I just have to move something around before I say yes. Be honest with me; which one of those things is it for you right now?"*

Objection: "Let me think about it..."

Handler:

- *MR/MRS Prospect, I've heard the only thing costlier than making a bad decision is not making one at all. If you don't change things, then things won't get better for you. You've mentioned that you're in the beginning stages of a very important process...*
- *Then do what my other clients do, and put me and my company to work for you. Once you see the positive results that we both know are possible here, you'll be saving time, money, AND energy... and that's going to be a win/win for us both, isn't it? Then here's what we need to do..."*

Objection: "Let me think about it..."

Handler:

- *MR/MRS Prospect, since we both agree this has a great chance to work for you, let me do this:*
- *While we're on the phone right now, I'm going to email you three customer testimonials from clients just like you, who were hesitant as well.*

- *And, when you read about how successful they were with us, you'll have peace of mind to take a step further. Once you see for yourself how this works, then we can talk about further involvement, is that fair?"*

Objection: "We're not ready yet... or Not a good time"

Handler:

- *I completely understand, can we find a 30-minute window next week to talk more?*
  - *Prospect: Send me an email. I'll take a look at my calendar to see if it's possible.*
- *Not a problem. What's the best email to send that to within the next 5 minutes?*
  - *Prospect: 123abc@client.com*
- *Great, I'll send you an email and include some possible times. Just so I propose some reasonable times, is there a day that works better for you?*
  - *Prospect: Tuesdays or Wednesdays.*
- *Mornings or afternoons?*
  - *Prospect: Afternoon Tuesday.*
- *Great, 3pm Tuesday works for me. I'll send you a calendar invite as a placeholder. Look for that in the next 5 mins. Is there a hurdle you're having that I can solve to make our time together worth it for you?*

Objection: "We're not ready yet... or Not a good time"

Handler:

- *I can appreciate that, MR/MRS Prospect, let's very quickly schedule 5 mins when it's better for you, or do you have 5 mins now? GREAT! One last thing, what can I research for you in the meantime, to make it worth it for you to pick up the phone when I call back?*

Objection: "We're not ready yet... or Not a good time"

Handler:

- *Understood, MR/MRS Prospect. There is a lot to get in order before buying a new home: preparing your current home for sale, meeting with a lender, insurance, inspectors, repairs, finding a home, etc. Would you like some help with all of that?*

Objection: "You have the wrong number..."

Handler:

- *I'm sorry! Well, now I have a problem, and maybe you can help me solve it.... My name is X and I work for Y, and we've got at least Z buyers looking for their next home; the market doesn't have enough to offer them. Have you ever considered taking a look at homes like yours online to see what they're being offered for?*

Objection: "We don't want a pushy salesperson"

Handler:

- *Good MR/MRS Prospect, because I consider myself a customer service professional, not a salesperson. My job today is to address your needs and provide you with professional guidance and assistance during the research process.*

Objection: "We don't want a pushy salesperson"

Handler:

- *Perfect. I would never want to be pushy. MR/MRS Prospect, I believe in listening to a client's needs and helping them to find the perfect property for them. So, what are you looking for in a home?*

Objection: "We don't want a pushy salesperson"

Handler:

- *I wouldn't want one either MR/MRS Prospect, but can I share something quickly with you? I might want help during the early research phase, someone who's proactive in finding me a few homes I wanted to buy... as two minds on this could be better than one... does that make sense?*

Objection: "Our credit isn't good enough yet"

Handler:

- *MR/MRS Prospect, I understand. Have you spoken to a lender to find out? That's very common. I've also had many clients find that their credit is better than they thought after speaking to a mortgage lender. Plus, a lender can help you start working to fix any credit issues right away. Could I have a lender that I trust at least give you a call?*

Objection: "Our credit isn't good enough yet"

Handler:

- *OK. Did you know that there are many loan programs available that have very different credit requirements? Wouldn't it make sense to at least meet with a lender to find out exactly where you stand?*

Objection: When you hear a complaint... apologies/frustrations

Handler:

- *Feel, Felt, Found-*
  - *FEEL: "I can appreciate that you feel..."*
  - *FELT: "and we know that some of our clients who've felt... didn't take the time to bring it to our attention; so first, thank you for that."*
  - *FOUND: "What we've found helpful at this point is to..."* and then move to reconciling their need.
- *"I'm sorry that we did not meet your expectations. Please let me apologize and ask.... What's troubling you most with this?"* Taking responsibility is not taking blame; you're recognizing there

was a fault, or a gap, and you're saying that you're willing to take steps to help them get over or through their hurdle.

- *"What can we do to make it up to you?"* Be aware you're opening yourself to any request; let them share their ideas, share a few of yours, and base what happens next to what's within your scope of ability.
- *"Here's what I'm going to do to make it right."* Follow with two suggestions, and invite them to choose one; repeat it back to them, then set an action to follow back up with them, and confirm the issue has been handled.

Objection: "We are already working with someone"

Handler:

- *MR/MRS Prospect, I'm sure a motivated person like you is already working with another firm to handle your home search needs. The reason I contacted you is because you'd registered on our site and we move quickly the way you do. Based on my experience working with clients who are searching online, online searches usually create immediate questions or the need for help right at that moment. So, how can I help you?*

Objection: "We are already working with someone"

Handler:

- *MR/MRS Prospect, almost every person interested in the housing market is searching in a few different places... how many sites have you searched on already? Doesn't it make sense to have a backup to make you feel more secure?*

Objection: "We are already working with someone"

Handler:

- *That's great, MR/MRS Prospect. Since you've already begun the process of searching, would you mind if I asked what they're doing great? We're always looking for great tips. Thank you for that... now, if there was one place they could improve, where would that be? Could we put our name in as a back-up? What can we do to earn that place in the next few days/weeks?*

Objection: "We want to find another home before we put ours on the market"

Handler:

- *"I agree, MR/MRS Prospect, finding your new home is important... can I share a thought with you? It may take as long as 2 to 4 months for your home to sell.*
- *Then it will take another 30-45 days to get the closing done; and in that time, another buyer may have seen the quality you saw, someone who could act quickly without a home to sell first; that can be heartbreaking, and I am definitely not in the heart-breaking business.*
- *Let's start the process to get your home on the market right now and get to work on getting your home sold, so you don't have to wait any longer than necessary to get moved into your new home... does this plan work for you?*

# CHAPTER 3

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# WHO DO I KNOW WHO IS A \_\_\_\_\_ ?

Accountants  
Alarm/Home Security Companies  
Appraisers  
Appliance Stores  
Architects  
Asbestos Mitigation  
Attorneys (General Practice, Real Estate,  
Family/Divorce, Wills, Trusts, Estates & Probate)  
Auto Body Shops & Repair  
Auto/Car Dealerships  
Auto Mechanics  
Baby-Sitters  
Banks (Personal & Business)  
Builders (New Home & Improvements/Add-ons)  
Cabinet Supply & Installation  
Caterers & Party Planners  
Carpenters  
Carpet Cleaners  
Carpet Supply Stores  
Chimney Cleaning  
Chiropractors  
Cleaning Services  
Computer & Networking Servicers  
Concrete, Cement & Pavers  
Construction Contractors  
Countertop Supply & Installation  
Credit Unions  
Day Care  
Deck Construction/Repair  
Dentists  
Dermatologists  
Doctors  
Dry Cleaners  
Dry Wall Companies

Electricians  
Engineers (Civil & Structural)  
Estate Sale Companies  
Event & Community Centers  
Excavating Services  
Fencing Companies  
Financial Planners  
Fireplace Supply & Repair  
Flooring Companies  
Florists  
Furniture Stores  
Garage Door & Repair  
Garden & Nurseries  
Geological & Soil Testing  
Gyms & Fitness Centers  
Hair Stylists  
Handyman Services  
Home Inspectors  
Home Stagers  
Home Warranties  
HVAC Companies (Heating & Cooling)  
Insurance (Auto, Health, Homeowners, etc.)  
Interior Designers  
Jewelry Stores  
Landscapers  
Lawn Care  
Locksmiths  
Masonry  
Mold Inspection & Mitigation  
Mortgage Lenders  
Movers (local & national)  
Mud-Jacking Companies  
Music (DJ & party services)  
Nannies  
Notaries  
Office Machines (copiers & printers)

Office Supply & Furniture Stores  
Optometrists  
Orthodontists  
Painter  
Pediatricians  
Pedicure Shops  
Personal Trainers  
Pest Control Companies  
Pet Kennels  
Pet Sitters  
Photographers  
Plumbers  
Pool Contractors  
Pool Care & Supply  
Pressure Cleaning  
Printing Companies  
Property Management  
Radon Inspection & Mitigation  
Rain Gutter Installation & Repair  
Restaurants  
Roofing Companies  
Senior Living Communities (Convalescent Homes & Assisted Living)  
Septic & Sewer Companies  
Siding & Stucco Contractors  
Sign & Banner Companies  
Snow Removal  
Spa & Tub Supply/Service  
Sprinkler/Irrigation Supply/Repair  
Stock Brokers  
Storage Companies  
Surveyors  
Tax Exchange (1031 Tax Exchange Consultants/Accommodators)  
Tailors  
Tile & Grout Contractors



# SOI CONTACT SCHEDULE

Time	Monday	Tuesday	Wednesday	Thursday	Friday	Friday
8:00 AM						
9:00 AM						
10:00 AM						
11:00 AM						
12:00 PM						
1:00 PM						
2:00 PM						
3:00 PM						
4:00 PM						
5:00 PM						

Whether it's after you first list a seller's home for sale or start showing a buyer property, the highest rate of real estate referrals always comes from ongoing working relationships with clients in the process of moving. The more times during a transaction that agents remind their clients that they work by referral, the more they increase the likelihood of receiving real estate referrals.

Many top agents will ask early and often in a systematic fashion throughout each transaction. This ensures that they always bring up the topic at the listing consultation, after a successful open house, after an offer is accepted, after inspection repairs are completed, after a home appraises, at closing, and after many other steps in the typical transaction are completed. So, use any one of the 5 scripts below early and often:

1. "I want to work with more clients like you, and I find that people looking to move know others in the same position. How would you feel about referring my services to them?"
2. "It's been really great working with you thus far, and I feel really grateful to Jane for introducing you to me. If it wasn't for her, I would've never met you. So I just wanted to take the time to ask you if you know anyone else that is looking to buy or sell a home, and if you would feel comfortable introducing them to me?"
3. "Who else do you know that needs to move right now?"
4. "You are so great to work with, and I find that people typically hang around similar people. I would love to work with more people like you, so do you know anyone looking to move in the near future?"
5. "Because you are in the process of moving right now, you will overhear a lot of conversations from different people looking to move when you are out and about. When you do, would you mind giving them my phone number and ask them to call me?"

“Hi \_\_\_\_\_, this is [Agent Name] with [Real Estate Company]. I’m reaching out to you today because we’re encountering a unique problem and I could use your help. Would you mind if I quickly explained?”

(Pause and continue with the script . . .)

“I’m not sure if you have noticed, but the real estate market has gotten extremely hot, and homes are selling faster than we can put them up for sale. Houses are even selling with multiple offers above asking price!”

(Pause and continue with the script . . .)

“However, this has also created a problem for our buyer clients trying to find a house to buy. This virtual housing shortage is the reason I’m calling you today. We have an abnormally large number of buyers that we need to find homes for, so I’m calling all of the people I know . . . like you . . . to see if you happen to know of anyone thinking about selling their home within the next year?”

(Pause, then try to help them if necessary . . .)

“Maybe a friend, family member or even a co-worker?”

(Pause and allow silence to do the heavy lifting here.)

(if YES, get name/contact info, or at least get permission to follow up later)

(If NO, continue with the script . . .)

“If you can think of anyone, we may even be able to get their home sold without ever going through the expense and hassle of putting the home up on the market. So, if you do run into anyone that’s considering selling, would you be open to referring me to them and letting me know?”

(Pause and continue with the script . . .)

“Great! Thank you so much for helping us!”

**Note to Consider:**

The use of the word “we,” as used in the sentence “We have an abnormally large number of buyers . . .” in paragraph 4 above and elsewhere throughout the script, is intended to allow you to refer to any buyers that other agents in your entire real estate brokerage have looking for homes as well. This use of “we” could also be implied to represent all of the agents in your local area as well.

“Hi \_\_\_\_\_, this is [Agent Name] with [Real Estate Company], how are you today?”

(Pause and continue with the script . . .)

“I’m calling because I’m updating my customer service database and noticed that I’m missing some contact information like email addresses, phone numbers and etc. Plus, I need to do a better job of staying in touch with people I know, and I’d love to send you something over the holidays and from time to time. Would that be OK with you?”

(Pause and continue with the script . . .)

“Great! So, let’s see, it looks like we need your [EMAIL ADDRESS] . . .”

(Obtain any missing information needed) . . .

“Perfect, thank you for your help!”

“So, is there anything that we can do for you right now?”

(Pause, respond if applicable and continue with the script . . .)

“While I’ve got you on the line, we are in a hot real estate market right now where homes are selling faster than we can put them up for sale. So, we suddenly have a large number of buyers that we need to find homes for. With that said, do you happen to know of anyone thinking about selling their home within the next year?”

(if YES, get name/contact info, or at least get permission to follow up later)

(If NO, continue with the script . . .)

“If you can think of anyone, we may even be able to get their home sold without ever going through the expense and hassle of putting the home up on the market. So, if you do run into anyone that’s considering selling, would you be open to referring me to them and letting me know?”

(Pause and continue with the script . . .)

“Great! Thank you so much for helping us!”

The script below can be used 2 or 3 times annually to continuously attempt to provide customer service beyond normal expectations. Additionally, this script directly asks for referrals and at the very least, helps agents stay first of mind with their past clients.

“Hi \_\_\_\_\_, this is [Agent Name] with [Real Estate Company], how are you today?”

(Pause and continue with the script . . .)

“I’m calling because I’m updating my customer service database and noticed that I’m missing some contact information like email addresses, phone numbers and etc. Plus, I need to do a better job of staying in touch with people I know, and I’d love to send you something over the holidays and from time to time. Would that be OK with you?”

(Pause and continue with the script . . .)

“Great! So, let’s see, it looks like I need your [EMAIL ADDRESS] . . .”

(Obtain any missing information needed) . . .

“Perfect, thank you for your help!”

“So, is there anything that I can do for you right now?”

(Pause, respond if applicable and continue with the script . . .)

“While I’ve got you on the line, I wanted to ask you who you might know that may be looking to move in the near future. Maybe a friend, family member or co-worker? Can you think of anyone right now?”

(if YES, get name/contact info, or at least get permission to follow up later)

(If NO, continue with the script . . .)

“If you do bump into anyone looking to move, would you be open to referring them to me?”

(Pause and continue with the script . . .)

“Great! Thank you so much for helping me!”

“Hi \_\_\_\_\_, this is [Agent Name] at [Real Estate Company], and in case you don’t remember, I’m the agent that sold your home and forgive me for not calling for so long how have you been?”

(Pause and continue with the script . . .)

“I’m ashamed to say that I haven’t checked in sooner because I had a bad client database system and we are now upgrading that, and I just wanted to touch back and see how your new home is treating you. Is everything going OK with it?”

(Pause and continue with the script . . .)

“Well from now on please feel free to look to me as your total home resource . . . like your own personal Angie’s List. If you ever need any repairs or improvements done to the home, you can contact me to refer you to a tested and trusted professional that I can personally hold accountable. How does that sound?”

(Pause and continue with the script . . .)

“Great! Since we’re in the process of trying to update our databases and do better at staying in communication, is it okay if I send you something over the holidays and from time to time?”

(Pause and continue with the script . . .)

“Excellent! Is this still your correct home address? How about your email address?”

(Pause and continue with the script . . .)

“Thank you! And thanks for letting me apologize for not following up and staying in better touch with you, and if there is anything I can do to be of service in the future please let me know?”

The script below can be used 2 or 3 times annually to continuously attempt to provide customer service beyond normal expectations. Additionally, this script directly asks for referrals and at the very least, helps agents stay first of mind with their past clients.

“Hi \_\_\_\_\_, this is [Agent Name] at [Real Estate Company]. I’m just calling as a customer service to check in with you to see how you’re doing in your new home. How has your new home been treating you?”

(Remember that the key is to continue to ask questions to uncover a need that you can help with.)

“What have you done to it?”

(Pause and continue with the script . . .)

“Are you planning on doing any work or improvements to it in the future?”

(Pause and continue with the script . . .)

“Would it help if I gave you the contact information of some professionals that I trust that could help you get that done at a reasonable cost?”

(Pause and continue with the script . . .)

“You see, I want you to think of me as your total home resource. Like your own personal Angie’s List. So, you can save yourself some time & frustration by letting me refer you to a tested & trusted company for any homeownership needs that may come up. Would that benefit you?”

(Pause and continue with the script . . .)

“Great! Oh, and by the way, I want to work with more clients like you, and I find that people typically hang around similar people. So, with that said, do you know anyone else looking to move in the near future?”

Hi it's [AGENT NAME] with [REAL ESTATE COMPANY],

I wanted to give you a heads up that I've set you up on our new Neighborhood Update Tool and would love to hear your feedback on it. My clients really love it. When one of your neighbors puts their home up for sale, you'll immediately get an email with all the listing information and photos of the home. This way, you'll be able to:

1. Look through all the **photos of your neighbors' homes**;
2. Compare the **amenities, features & size** of the listings to your own home;
3. Know the **price of each new listing** to get a rough idea of the current value of your own home;
4. See **how quickly each home sells**, and the **prices that they sell for**;
5. Have a good idea of **how the value of your home is increasing** from month-to-month;
6. **Keep up to date** on your local neighborhood's market conditions.

I really think you'll find this customer service tool useful since most of my clients already do. But if for some reason you decide that you'd rather not receive these updates, you can unsubscribe yourself or just simply reply to an email and we'll discontinue it for you. However, I'd love to hear what you think about it first.

All that I need from you is to verify that I have the correct home address and email address for you. Sound good?



# SAMPLE SOI DATABASE CONTACT PLANS

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## THE BASIC PLAN

- 26 emails (once every 2 weeks)
- 12 mailers (sent once a month)
- 2 phone calls (made once every 6 months)
- Post regularly on social media

## VALUE-BASED CONTACT PLAN (OR GIVING TO GET)

- 18 Emails (automated in CRM to send every 3 weeks)
- 3 Phone Calls
- 1 Drop-By (for example, pumpkins delivered to doorsteps in October)
- 1 Client Appreciation Event
- 4 Invitations to Client Appreciation Event: 2 emails, 1 mailer, and 1 phone call
- 1 Post-Event Email showing photos of event highlights and announcing event contest winners
- 12 Value-Based Mailers (sent once a month)

For Value-Based Mailers, try the following or come up with your own ideas!

- **January:** Happy New Year “*Thank You for Making it a Great Year*” postcard w/ photo of team
- **February:** Flyers/Coupons for local area Home, Garden & Patio Show
- **March:** Local College & Pro Sports Schedules
- **April:** Local & National Market Update
- **May:** Flower & Garden Seed Packets
- **June:** Summer Local Events Update (Graduations, Water Park Coupons, Summer Camps, etc.)
- **July:** Local & National Mid-Year Market Update
- **August:** Back to School Shopping Coupons & Sales
- **September:** Flyers/Coupons for local area Home, Garden & Patio Show
- **October:** Local & National Market Update
- **November:** Canned Food Drive (leave bags on doorstep to pickup) & include Holiday Recipe
- **December:** Happy Holidays Cards

## THE EFFICIENT PLAN

- 4 Quarterly Newsletters (mailed out every 3 months)
- 26 Emails (automated in CRM and sent every 2 weeks)
- 1 Client Appreciation Event
- 4 Invitations to Client Appreciation Event: 2 emails, 1 mailer, and 1 phone call
- 3 Phone Calls to SOI
- 1 Facebook direct message (to update database contact information)
- 1 Drop-By Visit (with treats)

## SAMPLE CHART BASED OFF COMMISSIONS

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AVG. COM	PER 7:1	AVG. COM	PER 7:1	AVG. COM	PER 7:1
\$2000	\$286	\$5000	\$714	\$12,000	\$1714
\$2500	\$357	\$6000	\$857	\$15,000	\$2142
\$3000	\$429	\$7000	\$1000	\$20,000	\$2857

## SAMPLE SOI FOLLOW-UP CONTACT SCHEDULE

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Day	DAY 1	DAY 2	DAY 3	DAY 4	DAY 5
Time Activity	9-10AM SOI Contact	9-10AM SOI Contact	5-6PM SOI Contact	9-10AM SOI Contact	9-10AM SOI Contact
Time Activity	10-10:30AM Follow-Up	10-10:30AM Follow-Up	6-6:30PM Follow-Up	10-10:30AM Follow-Up	10-10:30AM Follow-Up

# CHAPTER 4

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ICENHOWER  
COACHING & CONSULTING

# THE REASONS LISTINGS EXPIRE

Why New Businesses Fail	Why New Products Fail	Why Listings Fail to Sell & Ultimately Expire
Failing to Communicate with customers frequently enough or deeply enough	Failure to Understand Needs and Wants of the Consumer	Priced Too High (compared to like properties, or based on neighborhood)
Lack of Unique Value Proposition: no real differentiation from competition	Fixes a Non-Existent problem	Weak or Poor Marketing
Failure to Communicate Value in a clear, concise, and compelling fashion	Targeting the Wrong Market	Showing Property was too difficult
Inability to nail a Profitable Business Model with proven revenue streams	Incorrect Pricing	Pricing wasn't adjusted often enough, if at all, to recapture interest of buyers
Leadership Breakdown at the top	Weak Internal Capability & Infrastructure	Poor or weak communication between client and listing agent
	Delayed Market Entry	Condition of home, terms of contract were too restrictive
	Poor Execution or Delivery	Previous Agent's Reputation: poor/weak/unprofessional representation deterred other agents from showing/writing offers

## WIN THE CLIENT, WIN THE DAY: YOUR LEAD FOLLOW-UP

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Voicemail Script 1	"I'm calling about your home for sale. My number is 555-123-4567."
Voicemail Script 2	"Hi, this is (AGENT NAME) with (REAL ESTATE COMPANY), and I'm calling about the house you had listed in the multiple listing service, and I'd like to talk to you about the house. Would you please call me back as soon as possible? Call me at 555-123-4567."
Voicemail Script 3	"Hello, this is (AGENT NAME) with (REAL ESTATE COMPANY), and I'm calling about your listing that is no longer on the market. If you are interested in taking this opportunity to interview a different agent, call me at 555-123-4567."

# COMMUNICATION STRATEGIES

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Prospect	1234 Main Street: Dave & Mary Allen EXP
Day 1	Call, Thank You Note, Email with 7 Questions
Day 2	Call, Visit/Preview
Day 3	Call, Testimonial Email
Day 4	Call, Email Report of Comparative Homes that Sold
Day 5	Call, Drop Off List of Buyers
Day 6	Call
Day 7	Call, Move to 40 Touch SOI Database

## Expired Listing Call Log

Name: \_\_\_\_\_ Date: \_\_\_\_\_

	Name	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	40 Touch SOI Database	Notes
1.									<input type="checkbox"/>	
2.									<input type="checkbox"/>	
3.									<input type="checkbox"/>	
4.									<input type="checkbox"/>	
5.									<input type="checkbox"/>	
6.									<input type="checkbox"/>	
7.									<input type="checkbox"/>	
8.									<input type="checkbox"/>	
9.									<input type="checkbox"/>	
10.									<input type="checkbox"/>	
11.									<input type="checkbox"/>	
12.									<input type="checkbox"/>	
13.									<input type="checkbox"/>	
14.									<input type="checkbox"/>	
15.									<input type="checkbox"/>	
16.									<input type="checkbox"/>	
17.									<input type="checkbox"/>	
18.									<input type="checkbox"/>	
19.									<input type="checkbox"/>	
20.									<input type="checkbox"/>	

**TOTAL:** \_\_\_\_\_



## OBJECTION VALIDATION HANDLE & CLOSE

Objection/ Rejection	Validation	Handle & Close
We're leaving it off the market/ taking a break.	That's an option; it's also taking a break from the plans you had when you did want to move. Where were you going?	What I'm excited to meet with you about is when you DO move to _____, the net from your home sale is enough to buy down your next interest rate, pay for moving costs, <i>if our program is a fit for you</i> . Let's book time right now.
We're going to re-list with a friend/same agent	What benefit do you expect to get by re-listing with the same agent?	What I'd like to do is walk you through how my system finds more options like the one I'm suggesting to you now; you can turn down all of them, if you like; I'm asking for 10 minutes to show them to you, and make it your choice. This evening is good for me.
We're going to sell ourselves, go FSBO	Well, welcome to the industry! You're going to be represented in the market, maybe you'd be interested in a partnership and see what we bring to the table?	There are about 7 places you can concentrate on to avoid what happened last time; would you be open to working with me, to see if we can tackle 4 or 5 together in 15 minutes? Would you like to start tonight?
We're interviewing, but not dropping price.	Price is crucial; and we'll both talk about price. Let's be up front about it.	What we'll talk about first are a few key points that I'd like to show you in person... 10 minutes, and then you decide if I stay or if I go. And I can be there at 3.

# SAMPLE WEEKLY CALENDAR

	Mon 3/13	Tues 3/14	Wed 3/15	Thu 3/16	Fri 3/17
6a					
7a					
8a	8:30 - Prepare for Business	8:30 - Prepare for Business	8:30 - Prepare for Business	8:30 - Prepare for Business	8:30 - Prepare for Business
9a	9 — 11 Marketing/Business Generation	9 — 11 Marketing/Business Generation	9 — 11 Marketing/Business Generation	9 — 11 Marketing/Business Generation	9 — 11 Marketing/Business Generation
10a					
11a	11 — 12p Business Servicing	11 — 12p Business Servicing	11 — 12p Business Servicing	11 — 12p Business Servicing	11 — 12p Business Servicing
12p	12p-1p Lunch	12p-1p Lunch	12p-1p Lunch	12p-1p Lunch w/ Wife	12p-1p Lunch
1p	1p — 2p Lead Conversion & Follow-Up	1p — 2p Lead Conversion & Follow-Up	1p — 2p Lead Conversion & Follow-Up		1p — 2p Lead Conversion & Follow-Up
2p	2p — 3p Business Servicing	2p — 3p Business Servicing	2p — 3p Business Servicing	2p — 3p Lead Conversion & Follow-Up	2p — 3p Business Servicing
3p				3p — 4p Business Servicing	
4p	4p — 5:30p Listings Presentation - 123 Cottonwood Ct	4p — 6p Show Homes to Johnsons	3:30p — 6p Watch David's T-Ball Game	4:30p — 5:30p Buyer Consultation w/ Taylors	4p — 6p Listings Presentation - 456 Spring Creek Way
5p					
6p					
7p		6:30p — 8p Family Dinner			6:30p — 8:30p Family Birthday Party
8p					
9p					

# CHAPTER 5

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# WHAT DO PRODUCT DEMOS DO

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## JUMPSTART

A potential client who takes time to watch a product demonstration is in the earliest stage of consideration. **An open house is a very robust way of raising someone's interest level.**

## IPO OFFER

People are paying for the demo; there may not be a cover charge at the door, **they're still spending time and energy to be there. It's an initial investment.**

## TRIGGER

A Product Demo serves two purposes: help the consumer make the decision to buy or sell and determine whom they want to buy or sell with. **At an open house, your goal is to motivate them to buy or sell—and to choose you as their representative.**

## HELP ME HELP YOU

People want to research in a no-pressure environment, but still have a specialist available to answer their questions; it's why auto shows are so popular. **At an open house, you're on hand to explain your services while allowing the guest to look and think with no obligation.**

## REFERRALS FOR HIRE

Product Demos are the birthplace of social proof. People may not be personally interested in a purchase or sale—they might just like the product or are fascinated by the process—but **they will, in turn, go back and tell family and friends what they saw, and initiate a referral, based off their recommendation.**

*“Hi, I’m John Smith with ABC Realty. We have your neighbor’s home at 123 Main Street up for sale and we are holding a special open house on Saturday from 11:00am to 3:00pm.*

*Since we know that the ultimate purchaser of a home is often a friend, family member or acquaintance of someone that already lives in the same neighborhood, we are inviting the entire neighborhood to come by to take a look.*

*So if you happen to know or meet someone looking to move into your community, this is a great way for you to hand-pick pick your own neighbors!*

*Do you think you can swing by?”*

Wait for response and proceed with...

***If Yes: “Great! And since we are doing everything we can to get your neighbor’s home sold, I promised my seller that I’d ask: Do you know anyone looking to buy or sell a home in the area?”***

If No:

*“No problem, I totally understand. And since we are doing everything we can to get your neighbor’s home sold, I promised my seller that I’d ask: Do you know anyone looking to buy or sell a home in the near future?”*

[Possible Follow Up Question]:

*"And by the way, it's my intent to specialize & focus my practice in this neighborhood. So I'm providing all of the homeowners a complimentary value of \$500 with the hope that they might consider interviewing me when and if they ever decide to sell their home in the future. You see, an appraiser would typically charge you around \$500 to appraise your home, and I'm attempting to help you alleviate that cost to determine what your home would be worth in this market. Would knowing your home's current value be of any benefit to you?"*

If they are hesitant or otherwise object, proceed with...

[Objection Handler]

*"I see, and I want to assure you that there would be absolutely no obligation on your part. Again, this is a courtesy service that I am providing to all your neighbors with the hope that if you decided to sell 5, 10 or 20 years down the road, you would consider interviewing me for the job.*

*I would also never want you to straighten up your home just for me. I'm a REALTOR® and we're very used to viewing homes long before they're ready to show. I assure you it won't affect the value at all, and I'll be in and out in minutes. How does that sound?"*

If they are interested proceed with...

[If Yes]: ***"Great! Would 3:00 or 5:00 tomorrow work better for you?"***

Also be sure to obtain all of their contact information so that you can add them to your client database management system to stay in touch with them over time.

If No:

*"No problem, consider this a standing offer, so feel free to contact me if you are ever curious about your home's current value. In the meantime, can I count on you to let me know if you bump into anyone looking to move into the area so that we can get your neighbor's home sold?"*

Wait for a response then

*"Great! I truly appreciate your time and help.*

**Agent:** Hi (Home Owner), this is (Agent Name) with (Real Estate Company) and I just listed Emily and Joe house around the corner from you. The sellers wanted me to invite you to our grand opening this weekend from eleven to one.

Home Owner: Oh okay.

**Agent:** Yeah hopefully you can make it by. Tell me how long have you been in the neighborhood?

Home Owner: We've lived here for about five years now.

**Agent:** Five years, good for you! Well you know when list a great property like this and we put it up for sale on the market, we generally expect to get two to four motivated buyers that will miss out on the property. Do you know of any other neighbors in the neighborhood that maybe thinking about selling in this hot market?

Home Owner: Well..... You know I can't think of anybody right now. Every one that lives here loves it here.

**Agent:** It is a great neighborhood. As for you (Home Owner) if you were to move, where would you go next?

Home Owner: I don't know, we really like it here. I guess someday once the kids are gone we might move. I was thinking maybe in the country once the kids are out and out of the school district. I would go out to the country and become a country guy.

**Agent:** A country guy! Good for you, so are your kids about to graduate? When do you plan on moving out there?

Home Owner: They will probably graduate in four years. Well they just started high school.

**Agent:** Excellent, well hey I love to follow up with you from time to time and see if anything changes. Just in case you want to talk before I call you back, would it be ok if I send you my contact information?

Home Owner: Sure, that's fine.

**Agent:** Great what's the best E-mail for you?

Home Owner: You could reach me at [homeowner@emailaddress.com](mailto:homeowner@emailaddress.com)

**Agent:** Perfect. Well come on out (Home Owner) we look forward to seeing you. Hopefully you can make it on Saturday I'd love to meet you. We'll be over at 123 Main St. and would love to meet you there.

## OPEN HOUSE INVITATION AUDIENCE

Method	Projected Target Audience Size (Examples)
Newspaper Ads	<i>10,000 readers</i>
Personal Invitations, through calls	<i>90 Calls</i>
Personal Invitations, through door knocking	<i>100 Doors knocked</i>
Flyers & Mailouts	<i>300 Flyers/mailouts</i>
Emails to Your SOI Database	<i>600 member SOI emailed</i>
Circle Prospecting, with Autodialer	<i>300 Local Homes</i>
Social Media Posts to Personal Page	<i>1,000 Friends</i>
Social Media Posts to Business Page	<i>500 Fans</i>
MLS Open House Registration; Reverse Prospecting	<i>To 50 Agents with Buyer Searches that match subject property</i>
Syndication through Open House Sites	<i>1,000 searching for open houses</i>



“Mr/Mrs. SELLER, we find that the vast majority of homes that sell at a price close to our listing price sell within the first few weeks of putting the home up for sale in the market.

Accordingly, we have great success when we generate multiple offers from different buyers at the same time. More often than not, this occurs within the first couple weeks of putting a home up for sale. This is why we market so hard through mail, flyers, telephone calls, and open houses. Right at the time of listing.

We have also seen success at generating prices above or at the asking price when we can create multiple offer situations. Further, if your home does go under contract or at least generate an offer prior to holding the open house - nothing is more effective at keeping the buyer honest than holding an open house as scheduled previously.

For example, if we are negotiating back and forth with different offers - it often takes many days if not a week. If, during this process, we hold a pre-scheduled open house at the home, we can create extreme urgency with the potential buyer that's in negotiations with us.

When a home is under contract or at least being negotiated, buyers drive by the home to show it to friends and family members - as their future home. And there is nothing worse than seeing people walk through it who may steal it away. This strikes fear in the buyer and puts it in favor of you the seller.

Further, in situations where an offer has already been negotiated and accepted, holding pre-set open houses helps show buyers that other people are interested in the home. This way when it comes time to inspect and negotiate improvements in the home, later in the transaction process, the buyer will be less picky.

Which once again, strengthens the buying and negotiating power of you, the seller.”

## ACTIVITY PUNCH LIST

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Visitor/ Category	Follow Up	Detail
Sam Johnson/ Lead	<input type="checkbox"/> Call for Appt	Looking to buy in 3 mos.; liked home
Tammy Werner/ SOI	<input type="checkbox"/> Thank you note/ 7X7	Neighbor, lived here 3 years, no plans to move
Luke Onus/ Nurture	<input type="checkbox"/> Thank you note/drip	Just started looking. Move in 2 years
Cybil Parker/ SOI	<input type="checkbox"/> Thank you note/ 7X7	Neighbor, lived here 5 years, retiring from work in 5 years
Tony Bonnie/ Lead	<input type="checkbox"/> Call for Appt	FSBO in the area, curious about traffic, sales

“If you don’t mind, it would greatly help me if I could get some marketing feedback from you. Did you happen to see the flyer I created for this home with the Comparative Market Analysis (CMA) on the back?”

“Great! I’m curious if this was of any benefit to you. You see, I was attempting to show you the sizes and prices of other homes in the area so that you could use the neighborhood’s average price per square foot to get a rough idea of what your house is worth in this market. Do you happen to know the square footage of your home?”

“Terrific! Thank you. Now oftentimes your home will have different amenities and features than the houses listed on the CMA, which can significantly alter the value of your home.

Since it is my intent to specialize & focus my practice in this neighborhood, I’d be more than happy to take a brief look through your home to give you a quick value with absolutely no obligation on your part. It’s just something I do with the hopes that if you did sell sometime in the future you might consider my services.”

You see, an appraiser would typically charge you around \$500 to appraise your home, and I’m attempting to help you alleviate that cost.

I also wouldn’t want you to straighten up your home just for me. I’m a Realtor and we’re very used to viewing homes before they’re ready to show. I assure you it won’t affect the value at all.”

Would this be of any benefit to you?

(PAUSE – Let silence do the heavy lifting)

Great! How about I swing by right after I lock-up here?”

# CHAPTER 6

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COACHING & CONSULTING

"Hi! I'm John Smith with ABC Realty, and we're trying to find a buyer for your neighbor's home, which has 4 bedrooms, 2 baths and is priced at \$220,000. Who do you know that would like to move into the area?"

[Obtain the contact information of any lead they may give you, proceed with the script below]

"I ask because, as a neighbor, you're the best marketing; you like the area so much, you live here, right?"

(Pause)

"What caused you to choose here?"

["Great, let me write that down..."]

"How long have you lived in this home?"

[Repeat back to client]

"Where did you move from?"

["Thank you for helping me!"]

"Where would you move to, if you were going to move?"

"While we're here, when do you plan on moving?"

[If they plan to move in less than a year, proceed with the script.]

"Would it be of benefit to know what your home is currently worth and be able to start previewing homes online on your own?"

[Set an appointment to review comparison sales, set them up on MLS Listing E-Alert, and list the property for sale]

[OR if they say "We're not moving"]

"Great! I appreciate you taking time with me today, would you do me a favor? Be on the lookout for some of our invitations? Thanks again!"

“Mr/Mrs. Buyer, I know that Templeton is the top on your list of favorites; what the market has shown me is in the last year, only 12 homes have sold, out of the 340, about 3.5%. With supply and demand driving your purchase price, I want to prepare you that the prices could be higher compared to Allentown, where there’s higher turnover.”

# CHAPTER 7

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## WEEK 1 SAMPLE SCHEDULE

Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Motivational Recitation AM	Motivational Recitation AM	Motivational Recitation AM	Motivational Recitation AM	Motivational Recitation AM		
1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM		
1 HR Prospecting AM Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Prospecting AM Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Prospecting AM Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Prospecting AM Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Prospecting AM Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.		
1.5 HR Scripted Presentation Practice PM	1.5 HR Scripted Presentation Practice PM	1.5 HR Scripted Presentation Practice PM	1.5 HR Scripted Presentation Practice PM	1.5 HR Scripted Presentation Practice PM		



Name: \_\_\_\_\_ Date: \_\_\_\_\_

	Name	Ask for Appt?	Appt?	Ask for Referral	Referral?	Follow Up/Notes
1.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
2.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
3.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
4.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
5.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
6.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
7.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
8.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
9.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
10.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
11.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
12.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
13.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
14.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
15.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
16.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
17.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
18.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
19.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
20.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	

**TOTALS:** \_\_\_\_\_

**Total Contacts Made:** \_\_\_\_\_ **Total Referrals Received:** \_\_\_\_\_ **Total Appointments Made:** \_\_\_\_\_

## WEEK 1 PROPERTY PREVIEW SCHEDULE

Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Motivational Recitation AM	Motivational Recitation AM	Motivational Recitation AM	Motivational Recitation AM	Motivational Recitation AM		
1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM		
1 HR Prospecting AM Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Prospecting AM Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Prospecting AM Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Prospecting AM Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Prospecting AM Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.		
1 HR Propsecting AM - 20 Contacts from other sources	1 HR Propsecting AM - 20 Contacts from other sources	1 HR Propsecting AM - 20 Contacts from other sources	1 HR Propsecting AM - 20 Contacts from other sources	1 HR Propsecting AM - 20 Contacts from other sources		OPEN HOUSE Sit another agent's Open House
1.5 HR Scripted Presentation Practice PM	1.5 HR Scripted Presentation Practice PM	1.5 HR Scripted Presentation Practice PM	1.5 HR Scripted Presentation Practice PM	1.5 HR Scripted Presentation Practice PM		
Preview 2-3 Properties PM	Lead Generation Follow-up (5-7)	Preview 2-3 Properties PM	Lead Generation Follow-up (5-7)	Preview 2-3 Properties PM		
1 HR Prospecting PM	1 HR Prospecting PM	1 HR Prospecting PM	1 HR Prospecting PM	1 HR Prospecting PM		
Lead Generation Follow-up (5-7)		Lead Generation Follow-up (5-7)		Lead Generation Follow-up (5-7)		



## Week 1 Schedule

Name: \_\_\_\_\_ Date: \_\_\_\_\_

[illegible]

What percentage of the time were you able to follow the proposed schedule?

What did you do that helped you to keep the schedule?

What got in your way of keeping the schedule?

What will you do to overcome scheduling obstacles in the future?

## WEEK 2 SAMPLE SCHEDULE

Day 8	Day 9	Day 10	Day 11	Day 12	Day 13	Day 14
Motivational Recitation AM	Motivational Recitation AM	Motivational Recitation AM	Motivational Recitation AM	Motivational Recitation AM		
1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM		
1 HR Prospecting AM Checkl MLS & contact Expired Listings & document on <i>One Day 20 Contacts Form</i> .	1 HR Prospecting AM Checkl MLS & contact Expired Listings & document on <i>One Day 20 Contacts Form</i> .	1 HR Prospecting AM Checkl MLS & contact Expired Listings & document on <i>One Day 20 Contacts Form</i> .	1 HR Prospecting AM Checkl MLS & contact Expired Listings & document on <i>One Day 20 Contacts Form</i> .	1 HR Prospecting AM Checkl MLS & contact Expired Listings & document on <i>One Day 20 Contacts Form</i> .		
1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.		
1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.		
Preview 2-3 Properties PM	Lead Generation Follow-up (5-7)	Preview 2-3 Properties PM	Lead Generation Follow-up (5-7)	Preview 2-3 Properties PM		
1 HR Prospecting PM or Transaction Completion	1 HR Prospecting PM or Transaction Completion	1 HR Prospecting PM or Transaction Completion	1 HR Prospecting PM or Transaction Completion	1 HR Prospecting PM or Transaction Completion		
Lead Generation Follow-up (5-7)		Lead Generation Follow-up (5-7)		Lead Generation Follow-up (5-7)		

Name: \_\_\_\_\_ Date: \_\_\_\_\_

	Type*	Name & Phone	Ask for Appt?	Appt?	Ask for Referral	Referral?	Follow Up/Notes
1.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
2.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
3.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
4.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
5.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
6.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
7.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
8.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
9.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
10.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
11.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
12.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
13.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
14.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
15.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
16.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
17.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
18.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
19.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
20.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	

**TOTALS:** \_\_\_\_\_

\*Type: SOI, FSBO, Expired/Cancelled, Circle Prospecting, Online Lead, etc.

**Total Contacts Made:** \_\_\_\_\_

**Total Appointments Made:** \_\_\_\_\_

**Total Leads Referred:** \_\_\_\_\_

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Time	Day 8	Day 9	Day 10	Day 11	Day 12	Day 13	Day 14
	Motivational Recitation	Motivational Recitation	Motivational Recitation	Motivational Recitation	Motivational Recitation	Motivational Recitation	Motivational Recitation

## WEEK 3: SUGGESTED SCHEDULE

Day 15	Day 16	Day 17	Day 18	Day 19	Day 20	Day 21
Motivational Recitation AM	Motivational Recitation AM	Motivational Recitation AM	Motivational Recitation AM	Motivational Recitation AM		
1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM		
1 HR Prospecting AM Checkl MLS & contact Expired Listings & document on <i>One Day 20 Contacts Form</i> .	1 HR Prospecting AM Checkl MLS & contact Expired Listings & document on <i>One Day 20 Contacts Form</i> .	1 HR Prospecting AM Checkl MLS & contact Expired Listings & document on <i>One Day 20 Contacts Form</i> .	1 HR Prospecting AM Checkl MLS & contact Expired Listings & document on <i>One Day 20 Contacts Form</i> .	1 HR Prospecting AM Checkl MLS & contact Expired Listings & document on <i>One Day 20 Contacts Form</i> .		
1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> .	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> .	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> .	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> .	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> .		
1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> .	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> .	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> .	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> .	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> .	OPEN HOUSE Schedule & hold your own listed home or sit another agent's Open House	
Preview 2-3 Properties PM	Lead Generation Follow-up (5-7)	Preview 2-3 Properties PM	Lead Generation Follow-up (5-7)	Preview 2-3 Properties PM		
1 HR Prospecting PM or Transaction Completion	1 HR Prospecting PM or Transaction Completion	1 HR Prospecting PM or Transaction Completion	1 HR Prospecting PM or Transaction Completion	1 HR Prospecting PM or Transaction Completion		
Lead Generation Follow-up (5-7)	Call backs	Lead Generation Follow-up (5-7)	Lead Generation Follow-up (5-7)	Accountability Meeting		





## Week 3 Schedule

Name: \_\_\_\_\_ Date: \_\_\_\_\_

[illegible]

## WEEK 4: SUGGESTED SCHEDULE

Day 22	Day 23	Day 24	Day 25	Day 26	Day 27	Day 28
Motivational Recitation AM	Motivational Recitation AM	Motivational Recitation AM	Motivational Recitation AM	Motivational Recitation AM		
1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM	1.5 HR Scripted Presentation Practice AM		
1 HR Prospecting AM Contact Expired Listings & document on <i>One Day 20 Contacts Form</i> .	1 HR Prospecting AM Contact Expired Listings & document on <i>One Day 20 Contacts Form</i> .	1 HR Prospecting AM Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> ..	1 HR Prospecting AM Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> .	1 HR Prospecting AM Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> .		
1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.		
1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.	1 HR Propsecting AM - Call 10 SOI contacts & document on <i>Daily SOI Contact Form</i> to find out how soon they or someone they know will be selling a home.		OPEN HOUSE Schedule & hold your own listed home or sit another agent's Open House. You will schedule one Open House every weekend going forward.
Preview 2-3 Properties PM	Lead Generation Follow-up (5-7)	Preview 2-3 Properties PM	Lead Generation Follow-up (5-7)	Preview 2-3 Properties PM		
1 HR Prospecting PM or Transaction Completion	1 HR Prospecting PM or Transaction Completion	1 HR Prospecting PM or Transaction Completion	1 HR Prospecting PM or Transaction Completion	1 HR Prospecting PM or Transaction Completion		
Lead Generation Follow-up (5-7)	Call backs	Lead Generation Follow-up (5-7)	Lead Generation Follow-up (5-7)	Accountability Meeting		



## Week 4 Schedule

Name: \_\_\_\_\_ Date: \_\_\_\_\_

[illegible]

## MONTH 2: ONE DAY-20 CONTACTS FORM

Name: \_\_\_\_\_ Date: \_\_\_\_\_

	Type*	Name & Phone	Ask for Appt?	Appt?	Ask for Referral	Referral?	Follow Up/Notes
1.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
2.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
3.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
4.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
5.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
6.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
7.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
8.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
9.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
10.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
11.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
12.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
13.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
14.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
15.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
16.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
17.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
18.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
19.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
20.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	

**TOTALS:** \_\_\_\_\_

\*Type: SOI, FSBO, Expired/Cancelled, Circle Prospecting, Online Lead, etc.

**Total Contacts Made:** \_\_\_\_\_

**Total Appointments Made:** \_\_\_\_\_

**Total Leads Referred:** \_\_\_\_\_

Name: \_\_\_\_\_ Date: \_\_\_\_\_

[illegible]

**Calls Made:** FSBO: \_\_\_\_\_ EXPIRED: \_\_\_\_\_ CANCELLED: \_\_\_\_\_ CIRCLE: \_\_\_\_\_ SPHERE: \_\_\_\_\_  
**Contact Made:** FSBO: \_\_\_\_\_ EXPIRED: \_\_\_\_\_ CANCELLED: \_\_\_\_\_ CIRCLE: \_\_\_\_\_ SPHERE: \_\_\_\_\_

**Total Contacts Made:** \_\_\_\_\_ **Total Appointments Made:** \_\_\_\_\_

## MONTH 2: PERSONALIZED SCHEDULE

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Time	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
	Motivational Recitation	Motivational Recitation	Motivational Recitation	Motivational Recitation	Motivational Recitation	Motivational Recitation	Motivational Recitation

## MONTH 3: PERSONALIZED SCHEDULE

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Time	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
	Motivational Recitation	Motivational Recitation	Motivational Recitation	Motivational Recitation	Motivational Recitation	Motivational Recitation	Motivational Recitation

## Prospecting Accountability Chart

	Hours Previewing	Number Homes Previewed	Hours Prospecting	Number SOI Contacts	Number Leads Generated	Number Appointments	Number Transactions
Month 1							
Month 2							
Month 3							
Month 4							
Month 5							
Month 6							
Month 7							
Month 8							
Month 9							
Month 10							
Month 11							
Month 12							



Client Name: Insert Client Name here

### YEAR TO DATE NUMBERS

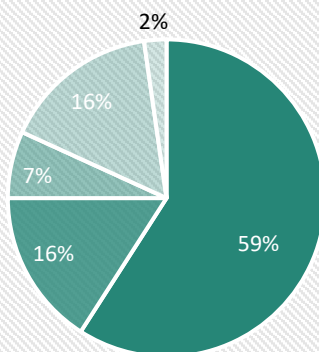
Closed Units	42
Closed Volume	\$10,072,334
Closed GCI	\$312,536
Pending GCI	\$63,820
Pending Volume	\$2,099,000
Active Listings	5

### BUYER / SELLER RATIO

Percent of Buyers	40
Percent of Sellers	60

### CLOSED LEAD SOURCES

Sphere of Influence (SOI)	24
Expired Listings	7
Agent Referrals	3
Online	7
Open House/Sign/ Office	1



### CLOSED LEAD SOURCES

- Sphere of Influence (SOI)
- Expired Listings
- Agent Referrals
- Online
- Open House/Sign/ Office

# SAMPLE WEEKLY CALENDAR

	Mon 3/13	Tues 3/14	Wed 3/15	Thu 3/16	Fri 3/17
6a					
7a					
8a	8:30 - Prepare for Business	8:30 - Prepare for Business	8:30 - Prepare for Business	8:30 - Prepare for Business	8:30 - Prepare for Business
9a	9 — 11 Marketing/Business Generation	9 — 11 Marketing/Business Generation	9 — 11 Marketing/Business Generation	9 — 11 Marketing/Business Generation	9 — 11 Marketing/Business Generation
10a					
11a	11 — 12p Business Servicing	11 — 12p Business Servicing	11 — 12p Business Servicing	11 — 12p Business Servicing	11 — 12p Business Servicing
12p	12p-1p Lunch	12p-1p Lunch	12p-1p Lunch	12p-1p Lunch w/ Wife	12p-1p Lunch
1p	1p — 2p Lead Conversion & Follow-Up	1p — 2p Lead Conversion & Follow-Up	1p — 2p Lead Conversion & Follow-Up		1p — 2p Lead Conversion & Follow-Up
2p	2p — 3p Business Servicing	2p — 3p Business Servicing	2p — 3p Business Servicing	2p — 3p Lead Conversion & Follow-Up	2p — 3p Business Servicing
3p				3p — 4p Business Servicing	
4p	4p — 5:30p Listings Presentation - 123 Cottonwood Ct	4p — 6p Show Homes to Johnsons	3:30p — 6p Watch David's T-Ball Game	4:30p — 5:30p Buyer Consultation w/ Taylors	4p — 6p Listings Presentation - 456 Spring Creek Way
5p					
6p					
7p		6:30p — 8p Family Dinner			6:30p — 8:30p Family Birthday Party
8p					
9p					

# CHAPTER 8

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## FSBO ACTIVITY GOAL SHEET

Activity	<i>Previewing</i>	<i>Circle Prospecting</i>	<i>Showing</i>	<i>Off Hours</i>
Goal				

# FSBO CONTACT SHEET

FSBO Contact Sheet					
Location	Owner	Description	Asking Price	# Days on Market	Contact Information

**1. “If I brought you a qualified buyer, would you be willing to pay me a 3% commission?”**

If YES, continue on to the next question...

**2. “How long are you going to try to sell your home on your own before you explore other options?”**

Cut their answer in half for practical purposes. So, if they say 2 months, they will likely list in a month. If their answer is 6 months or less, continue on to the next question . . .

**3. “If you don’t sell your home by that time, what other options will you consider?”**

This question is to ensure that an agent is not their relative or best friend and you don’t waste too much time and effort. If they are open to the possibility of interviewing agents in the future, place them in your lead follow-up campaign and move on to contacting the next FSBO seller!

**Points to Consider:**

FSBO sellers are very receptive to calls concerning the sale of their home. They are also often eager to get calls from agents that might have a buyer for their home and they might be willing to pay half the commission to an agent that brings them a buyer.

Prospecting for FSBO listings is a numbers game, and even the most effective agents will list no more than 20% of the FSBO sellers they contact. Therefore, it is essential to filter through FSBO sellers quickly over the phone by asking the qualifying questions above. Don’t always attempt to aggressively close an appointment on the first call or you might find yourself wasting a lot of evenings on fruitless appointments. They may never intend to use an agent or they might be obligated to use an agent that is a family member or friend if they ever do list their home.

1. Hi, I'm looking for the owner of the home for sale.
2. This is (AGENT NAME) with (REAL ESTATE COMPANY). As an area specialist it's my goal is to know about all the homes for sale in the marketplace for the buyers I'm working with. Do you mind if I ask you a few questions about your property? Great thank you!
3. I know that when I saw your listing online it said your home had \_\_\_\_bedrooms and \_\_\_\_baths. Are the rooms a good size? How's the kitchen? Have the bathrooms been updated? Would you tell me about the yard? Is there anything else that is unique about your home that potential buyers would like to know?
4. Sounds like you have a great home, why are you selling?
5. Where are you moving?
6. How did you decide on that area?
7. So, do you have to your current home before buying your next one?
8. When did you want to be moved?
9. How did you determine your listing price?
10. You know, with so many other homes on the market right now, what are you doing differently to market yours...? What else...?
11. If there were an advantage to using me to market your home, would you consider it?
12. Normally at this point... I would say... let's get together for 20 minutes or so... so we can discuss how we can help you achieve your goal... I have some time (\_\_\_\_\_) or would (\_\_\_\_\_) be better for you?

1. “Hi, this is [AGENT NAME] with [REAL ESTATE COMPANY], and I’m calling because we just sold another home in the Johnson Meadows area, and I happened to notice that you are interested in selling your property, is that correct?”
2. “Is the property still available or do you currently have it under contract?”
3. “The home that sold recently had about 2,000 square feet with 4 bedrooms & 2 baths. How big is your home?”
4. “When your home does sell, where do you plan on moving?”  
(Ask more questions about why they are selling. Motivation is the key, so uncover all of their reasons.)
5. “Just curious, how long are you going to try and sell it on your own?”
6. “If I were to bring a buyer while you are trying to sell it, would you cooperate on commission?”
7. “Obviously, I cannot sell something without seeing it first. When would be a good time to preview the home? Would this afternoon around 3:00 p.m. be good, or would tomorrow at 4:00 p.m. be better?”

#### **Note to Consider:**

In paragraph No. 1, the use of the word “we” as used in the sentence “. . . *because we just sold another home* . . .” is intended to allow you to refer to any home you recently sold in the area, or any home sold by other agents in your entire real estate brokerage as well.



1. Hello, I'm calling about the home for sale. Is this \_\_\_\_\_? Hi, this is (AGENT NAME) with (REAL ESTATE COMPANY) and I noticed that you have your home for sale and you're selling it yourself, is that correct?
2. I'm calling because I've helped a lot of For Sale By Owners sell their homes, and I decided to give you a call to see how things are going for you?
3. When you do sell this home, where will you be moving to?
4. In a perfect world, by when do you want to get there?
5. I'm curious, is having to pay a commission the main reason why you decided to sell the home yourself instead of using a real estate agent?
6. If I show you how I can sell your home and actually net you more money than trying to sell it yourself, even after paying my commission, would it be something you're interested in hearing about? *(If YES . . .)* I have an opening at 4:00 today or would 3:00 tomorrow, which would be better for you? *(If NO continue with the script . . .)*
7. I understand, if you believed an agent could do that you would've hired one already, right? But if you could net more money by listing your home for sale with me, rather than try to sell it on your own, you'd probably list your home with me wouldn't you?
8. That's exactly why we need to meet. I have an opening at 4:00 today or would 3:00 tomorrow, which would be better for you?
9. *(If you can't overcome their objections to meeting in person, ask for their mobile number and email address to follow up weekly and continue with . . .)*
10. I tell you what, I will contact you with any new home sale activity that may impact the appraised value of your home. In the meantime, if you have any questions or if there is anything that I can help you with, please give me a call at (555) 799-2345. I'll be happy to assist you in any way that I can!

1. Mr. and Mrs. FSBO Seller, if I took a Rolex directly from the store, kept the packaging on it, and even left the original price tag on it, and I put that watch it a garage sale, do you think I could get the same amount of money for it than if it were in a store?
2. You already know the answer. It's no, of course not, because there's a salesperson and a company involved in selling the watch. Just by having the expertise of a salesperson, the value of the watch goes up.
3. Now, if I took that same watch and put it in an auction, could I get more money for it than if I put it in a garage sale? You're right, we definitely could.
4. Now I can't promise you that you'll get more than one offer on your home, but I can tell you that putting it on the open market with an expert in your corner is more like selling it at an auction than listing it by yourselves -- which is more like the garage sale.
5. And you do want a higher selling price, don't you...?

# CHAPTER 9

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## DAILY CONTACT SHEET EXAMPLE

Preview/ Neighbor Property	First Name	Last Name	Moved Here From? When?	Net Move? When?	Invite Info?	Notes about Neighborhood?
1212 Market St (PREVIEW)	Dave & Wendy	Foster	1982, New York	Sold, San Fran	n/a	3 Bd, 2 Ba, 1,900 sqft split level, unfinished basement, master bath opens to deck, gallery style kitchen, classic ford truck in garage
1211 Market St	Tim	Donner	1995, Baltimore	Not Sure	(555) 555-1212	Likes Mtb Trails, peaceful, block party in summer
1221 Market St	Linda & Bill	Witner	1976, Downtown	6 years, Florida	n/a	Updated house 5 years ago, lots of kids at Halloween, Local pub: sports
1225 Market St	Heather & Ray	Thomas	2004, San Fran	??, Work	(555) 867-5309	Work transfer, don't know neighbors, want sales prices
1226 Market St	David	Castle	1994, New Hampshire	??, ???	(555) 121-1212	Daughter will be looking in may, call to follow up, Jamie 555-1212

Hi, I'm (John Smith) with (ABC Realty), and we just listed a home for sale in your neighborhood on (123 Main Street) for (\$250,000), and we often find that the ultimate buyer of a home is a friend, family member or acquaintance of someone that lives in the same neighborhood. Since we are doing everything we can to sell your neighbor's home, I'd like to ask you if you know anyone looking to move into your community?

Answer: "No".

Great! I truly appreciate your taking the time to try and help. So tell me, when do you plan on moving?

Answer: "No plans".

How long have you lived in your home?

Answer: "5 years".

Where did you live before that?

Answer: "Denver, Colorado".

Excellent! How did you pick this community?

Answer: "To be near family".

Great! So if you were to move, where would you move next?

Answer: "To Florida".

And when would that most likely be?

**If their answer is 6 months or less, continue:**

Did you know that it can take up to 6 months to get a home prepared, marketed and sold in today's market?

Answer: "No".

Great! So do you want your home sold in 6 months, or do you want to start the process of selling then?

Answer: "Sold".

Perfect! All that we need to do to start you on your way to (Florida) is pick a time to get together. How does that sound?

Answer: "Great".

Excellent! Would Wednesday or Thursday at 4:00pm work better for you?

Hi, I'm (John Smith) with (ABC Realty), and we just sold a home for sale in your neighborhood on (123 Main Street) for (\$250,000), and when one neighbor sells a home, typically 2 or 3 more homes in the same neighborhood sell right away. So I was curious as to when you plan on moving?

Answer: "No plans".

Great! How long have you lived in your home?

Answer: "5 years".

Terrific! Where did you live before that?

Answer: "Denver, Colorado".

Excellent! How did you pick this community?

Answer: "To be near family".

Wonderful! So if you were to move, where would you move next?

Answer: "To Florida".

Exciting! And when would that most likely be?

**If their answer is 6 months or less, continue:**

Did you know that it can take up to 6 months to get a home prepared, marketed and sold in today's market?

Answer: "No".

Great! So do you want your home sold in 6 months, or do you want to start the process of selling then?

Answer: "Sold".

Perfect! All that we need to do to start you on your way to (Florida) is pick a time to get together. How does that sound?

Answer: "Great".

Excellent! Would Wednesday or Thursday at 4:00pm work better for you?

Hi, I'm (John Smith) with (ABC Realty), I was calling to let you know that (85) homes have sold in your area in the last (30) days, and (63) of those sold at or above the marketed price! Did you know this?

Answer: "No".

We know that when homes sell that fast, typically 2 or 3 more homes in the same neighborhood sell right away. So I was curious as to when you plan on moving?

Answer: "No plans".

Great! How long have you lived in your home?

Answer: "5 years".

Terrific! Where did you live before that?

Answer: "Denver, Colorado".

Excellent! How did you pick this community?

Answer: "To be near family".

Wonderful! So if you were to move, where would you move next?

Answer: "To Florida".

Exciting! And when would that most likely be?

**If their answer is 6 months or less, continue:**

Did you know that it can take up to 6 months to get a home prepared, marketed and sold in today's market?

Answer: "No".

Great! So do you want your home sold in 6 months, or do you want to start the process of selling then?

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Perfect! All that we need to do to start you on your way to (Florida) is pick a time to get together. How does that sound?

Answer: "Great".

Excellent! Would Wednesday or Thursday at 4:00pm work better for you?

**Agent:** Hi (Home Owner), this is (Agent Name) with (Real Estate Company) and I just listed Emily and Joe house around the corner from you. The sellers wanted me to invite you to our grand opening this weekend from eleven to one.

Home Owner: Oh okay.

**Agent:** Yeah hopefully you can make it by. Tell me how long have you been in the neighborhood?

Home Owner: We've lived here for about five years now.

**Agent:** Five years, good for you! Well you know when list a great property like this and we put it up for sale on the market, we generally expect to get two to four motivated buyers that will miss out on the property. Do you know of any other neighbors in the neighborhood that maybe thinking about selling in this hot market?

Home Owner: Well..... You know I can't think of anybody right now. Every one that lives here loves it here.

**Agent:** It is a great neighborhood. As for you (Home Owner) if you were to move, where would you go next?

Home Owner: I don't know, we really like it here. I guess someday once the kids are gone we might move. I was thinking maybe in the country once the kids are out and out of the school district. I would go out to the country and become a country guy.

**Agent:** A country guy! Good for you, so are your kids about to graduate? When do you plan on moving out there?

Home Owner: They will probably graduate in four years. Well they just started high school.

**Agent:** Excellent, well hey I love to follow up with you from time to time and see if anything changes. Just in case you want to talk before I call you back, would it be ok if I send you my contact information?

Home Owner: Sure, that's fine.

**Agent:** Great what's the best E-mail for you?

Home Owner: You could reach me at [homeowner@emailaddress.com](mailto:homeowner@emailaddress.com)

**Agent:** Perfect. Well come on out (Home Owner) we look forward to seeing you. Hopefully you can make it on Saturday I'd love to meet you. We'll be over at 123 Main St. and would love to meet you there.

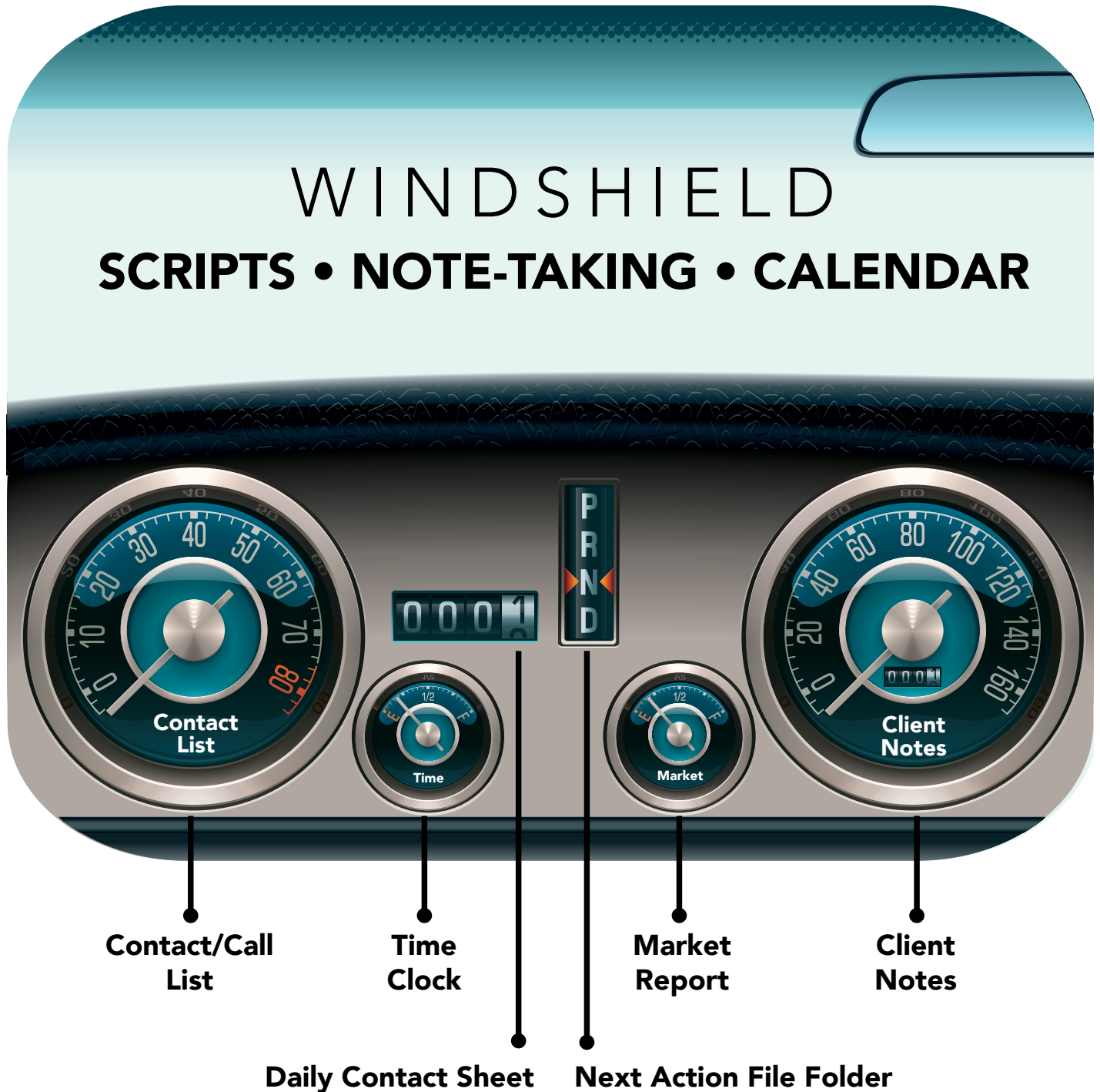


# CHAPTER 10

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# YOUR WORKING WINDSHIELD

## WINDSHIELD SCRIPTS • NOTE-TAKING • CALENDAR



# EXERCISE: WHERE ARE YOU NOW?

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Take a moment to think about and answer the following questions.

Compared to what you’re currently using, what are two benefits you can immediately see from this type of workstation?

- 1. ....
- 2. ....

What could be the biggest hurdle for you?

.....

.....

.....

.....

.....

Where does your system save you time? Preparation? What about during the process? After the process? During leverage? Be specific where you can.

.....

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## EXERCISE: WHERE ARE YOU NOW? (CONTINUED)

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Would a repeated process help your efforts? How so?

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Where would it hinder your efforts?

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# EXERCISE: WHERE ARE YOU NOW?

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The idea of using kits is taking your process, procedures, or systems, and creating a physical “baton” to move the client to a next action.

What are some of the systems that you currently use to keep your materials organized?

.....

.....

.....

.....

What are the activities that seem to take the most time, done “as needed” that you could build a kit for?

.....

.....

.....

.....

Do you currently have kits set up for the following prospect types?

Open House Guests	<input type="checkbox"/> Yes / <input type="checkbox"/> No
Pre-Listing Prospects	<input type="checkbox"/> Yes / <input type="checkbox"/> No
FSBO Listings	<input type="checkbox"/> Yes / <input type="checkbox"/> No
Expired Listings	<input type="checkbox"/> Yes / <input type="checkbox"/> No
Listing Appointments	<input type="checkbox"/> Yes / <input type="checkbox"/> No
Buyer Presentations	<input type="checkbox"/> Yes / <input type="checkbox"/> No
Other	<input type="checkbox"/> Yes / <input type="checkbox"/> No

What are some reoccurring documents that might show up in each kit, no matter the specialty? Put a Check or an X on those you use. Circle those you need.

## EXERCISE: WHERE ARE YOU NOW? (CONTINUED)

---

Pre-Appointment Checklist	Business Biography	Testimonials
<p>"How did you hear about us?" questionnaire</p> <p><input type="checkbox"/> Yes / <input type="checkbox"/> No</p>	<p>Workflow of a Transaction</p> <p><input type="checkbox"/> Yes / <input type="checkbox"/> No</p>	<p>Introduction to the People you Work With</p> <p><input type="checkbox"/> Yes / <input type="checkbox"/> No</p>
<p>Market Snapshot</p> <p><input type="checkbox"/> Yes / <input type="checkbox"/> No</p>	<p>What We Do For You</p> <p><input type="checkbox"/> Yes / <input type="checkbox"/> No</p>	<p>Your Resume</p> <p><input type="checkbox"/> Yes / <input type="checkbox"/> No</p>
<p>Other:</p>	<p>Other:</p>	<p>Other:</p>

# CHAPTER 11

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## TOTAL MARKET OVERVIEW

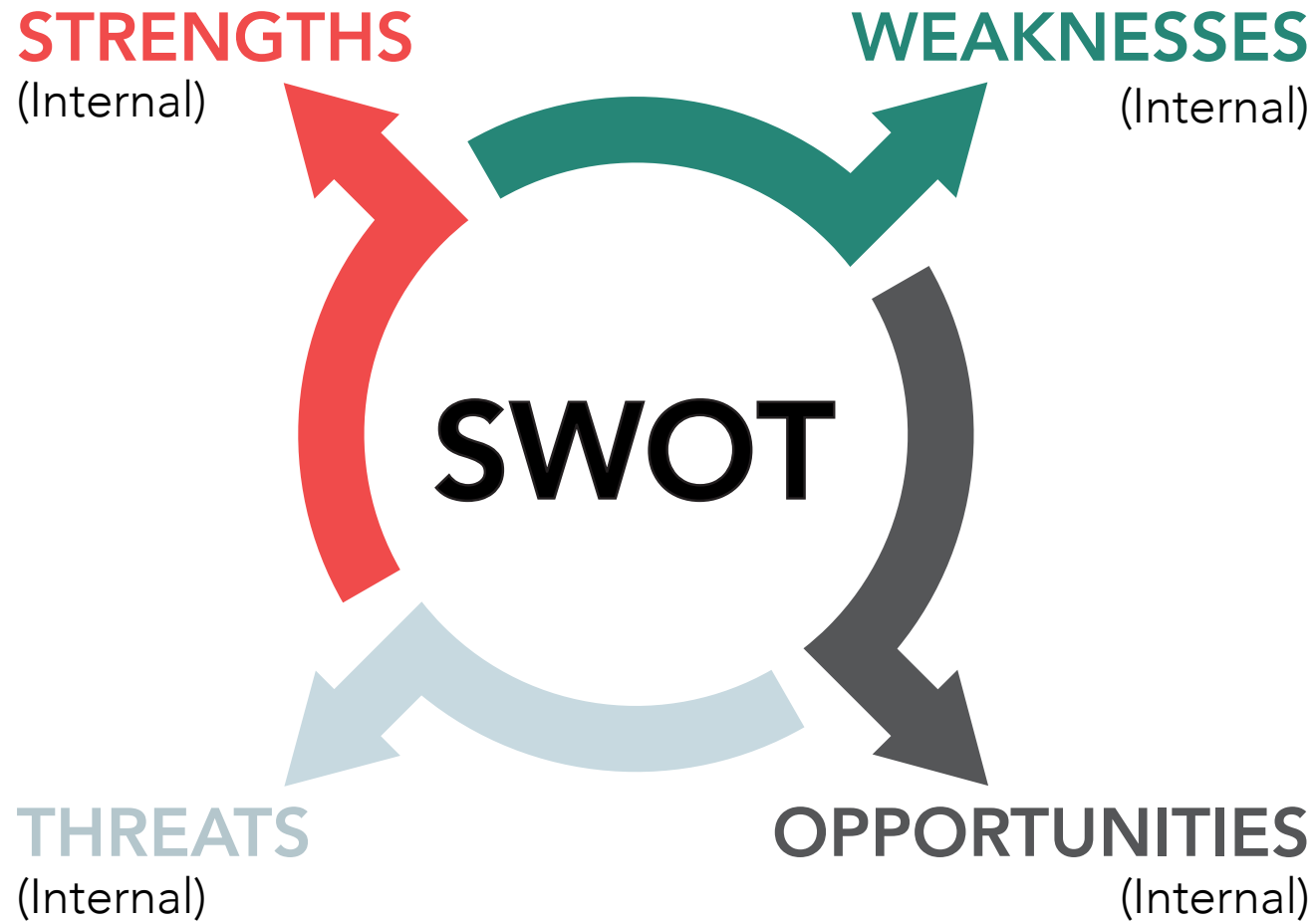
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Price Range	Active	Pending	Exp/Can	Sold/last 6 mos.	Avg Sold Price	Avg % of Listing Price	Avg Days on Market
Under \$300K	100	25	15	80	\$245K	95%	35
\$300K-\$600K	80	10	11	24	\$450K	94%	75
Above %600K	45	6	9	18	\$780K	98%	140



# SWOT ANALYSIS

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# SWOT COMPANION WORKSHEET

STRENGTHS	
WEAKNESSES	
THREATS	
OPPORTUNITIES	

# SWOT CATEGORIES AND QUESTIONS

## STRENGTHS

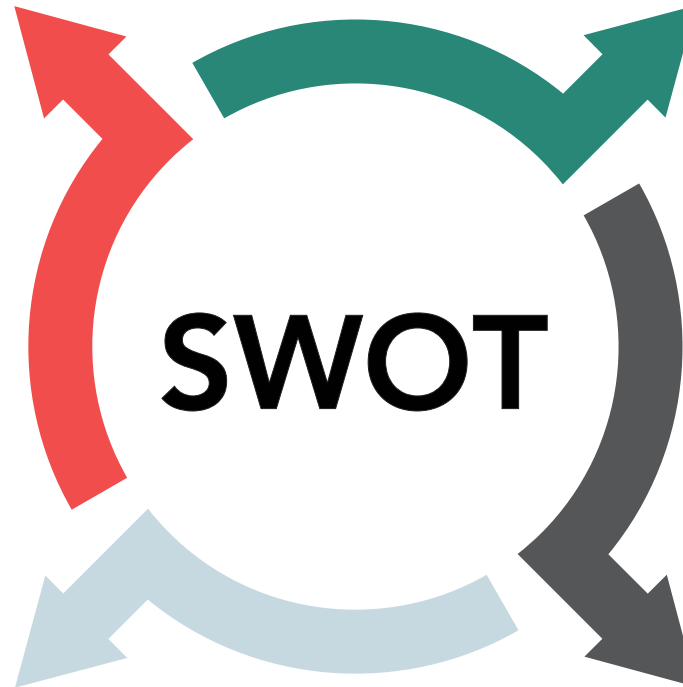
(Internal)

- What skills and talents do you have?
- What advantages do you have that others don't?
- What achievements are you most proud of?
- What makes you unique?
- What do other people like about you?

## WEAKNESSES

(Internal)

- What areas need improvement?
- What's your greatest weakness?
- What do you try to avoid doing?
- What are your negative work habits?
- What would others suggest you improve?



## THREATS

(External)

- What obstacles do you face at your company or as a solo agent in real estate?
- Who are your strongest competitors?
- How are your finances? How long can you go without earning your commission?
- What extranal factors prevent you from prospecting?
- What is the biggest external danger that would prevent you from reaching your goals?

## OPPORTUNITIES

(External)

- What new technology can help you?
- Do you have an overlooked network of contacts that you can tap into?
- What trends do you see at your real estate company, and how can you benefit from that?
- Is there a need in your company or community that nobody is filling? How can you contribute or help?

# SMART ACTION PLAN

## SPECIFIC

What?

Who?

Where?

Why?

Which?

How?

## MEASURABLE

## ACHIEVABLE

## RELEVANT

## TIME-BOUND

My goal in a single sentence is:

# CHAPTER 12

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**SCRIPT 1** – “It is our policy to have you consent to me representing you as your agent before we start looking at homes. By signing this you are just agreeing to that.”

**SCRIPT 2** – “I’m required to have an agreement between us to be able to act as your agent and show you homes. I just need your signature to get started.”

**SCRIPT 3** – “By signing this agreement you are authorizing me to represent you and look out for your best interests throughout the home buying process.”

**SCRIPT 4** – “In order for me to help you without possible conflicts of interest, protect your confidentiality, and operate in your best interests, I am required to have you sign this agreement to represent you as an agent.”

**SCRIPT 5** – “My broker requires that I have my buyers sign this agreement so I can get to work for you and be on your side.”

### Handling Objections to Signing the Buyer Agency Agreement

**SCRIPT 1** – “Often times I find that if a buyer is uncertain about signing this agreement, it usually means I haven’t answered all of your questions or there is something you haven’t told me. Was there something you wanted to cover today that I forgot to ask you?”

**SCRIPT 2** – “What is it that concerns you? Would it help if I stepped out of the room for a bit so that you two can chat privately?”

**SCRIPT 3** – “Signing this agreement is actually our policy since I can’t be 100% committed to you unless your 100% committed to me representing your best interests.”

**SCRIPT 4** – “I sense a little apprehension. I tell you what, if we get to a point in the process where you don’t like working with me, then I won’t have a problem ending our agreement. I just ask that you let me know as soon as possible. How does that sound?”

**SCRIPT 5** – “I tell you what, how about we look at a few homes to make sure you’re comfortable working with me, then we can worry about signing it?”

# WHICH CLOSER ARE YOU?

## I'M A GREAT CLOSER

## I'M A NOT SO GREAT CLOSER

I get incredibly clear and honest answers because I ask great, clear questions.

I offer a great service based off real client's real concerns.

I get great time-value from clients because I get to the point and cut out unneeded or unwanted parts.

My client's time value goes up because I move through the process they truly need at the pace they understand and respect.

My clients are educated and trained on what's what, what's happened, and what's coming next.

Not only do my people feel heard, they feel empowered because I communicate in a way that they know they are making a decision based on the best information available for their specific needs.

People trust and respect me sooner, because I'm confident to ask the tough questions and elicit the real answer.

People trust and respect me sooner, because I'm confident to ask the tough questions and elicit the real answer.

People are willing to take more risks with me because I've presented great options with clear results and I avoid overdramatic repercussions.

My schedule is full of appointments because I've set an expectation that I'll be asking for business if it's a great fit for everyone involved.

People tell me "No" sooner, because my offer is clear, doesn't fit, and they don't want to waste my time.

I get vague remarks and incomplete answers, because I ask vague and ambiguous questions.

I mysteriously infer or hint at what I failed or forgot to research.

I overspend my time, thinking that the more words I use, the more value I bring.

I wander through my presentations, rushing because I'm lost, or stalling because I've given everything I've got and they seem bored and disinterested.

My clients call me a miracle worker—not because they're impressed, but because it's a miracle they made it out alive.

My clients probably feel that they just watched a presentation that they didn't necessarily need to be present for.

My clients are wondering if they're in big trouble financially and organizationally, and are thinking of just doing it themselves.

My clients are wondering if they're in big trouble financially and organizationally, and are thinking of just doing it themselves.

I scare my clients with terrible scenarios. They're suspicious of me and are exploring other options without me at the helm.

I'm booked to the gills with meetings with people who are happy to catch up during business hours without giving me any business, now or ever.

People are unsure about what exactly I'm offering and say, "We'll see..." just to get me off the phone or their doorstep.

# PERMISSION

"If it's okay with you, I'd like to walk through a few steps that follow a client listing their home for sale... "

"Could I share with you what clients have told me after they closed on their home, and have really helped me understand where you're at a little better?"

"There are a few benefits to planning our next week's showings that might clear up questions, if you're open to it..."



"The most desirable homes listed at the lowest prices sell the fastest, so you don't ever get to see them on Zillow and other secondary websites. Homes on those types of sites are actually the homes that most people did not want.

You see all home listings are initially listed in the REALTORS® Multiple Listing Service (MLS) online database of homes for sale. Then the listing information is sent through digital feeds to other secondary sources, and then on to these other websites. This is why the information on these sites is often incorrect and a week or two old. That's why websites like Zillow do not have the same number of listings as our MLS does.

**(Closing/Guiding Moment)** If you are looking for home on Zillow you're just seeing the leftovers that no one else wanted. Are you following me?"

"Plus, many offices, companies, and associations of REALTORS® do not allow digital feeds to go to secondary websites like Zillow. So not only do you miss out on the homes that have already sold quickly, but there are many active listings that you can't see at all. Does all that make sense?"

"If you want to see all the listings the minute they go up for sale and get FULL REALTOR® ACCESS, I can easily set you up on our online platform. Then you can see what the real estate agents see, as soon as they see it. You can look at the homes online in the privacy of your own home, on your own time, with absolutely no pressure or obligation. I can even set the system up to send you email notifications the minute new homes hit the market that fits the specific criteria you are looking for in a home.

**(Closing/Guiding Moment)** If you happened to want to see the inside of one of them, you can just reply to the email or call me and we'll get you inside quickly. Would that be a benefit to you?"

"This way you'll also be able to learn about the prices of homes in different neighborhoods to become a more informed buyer. You'll start to see what's a good deal, what's not, how quickly certain homes sell in different areas and price ranges. Once you see what you can get for your dollar, you'll be able to drive around on the weekends and check out some of the neighborhoods on your own time. Look at the school districts, nearby shopping, and other amenities.

**(Closing/Guiding Moment):** You can take your time with this if you want. How does that sound?"

**Closing/Guiding Moment:** "Great, all that I need to do is briefly meet with you in person to set you up on our system and then you can leisurely browse for homes on your own time. Would 4:00 pm today or 2:00 pm tomorrow work for you?"

**(Closing Moment)** "Thank you! I just need to ask you a few more quick questions before we meet. This will help me get you set up on our online platform ahead of time so you can be in, out, and on your way faster when we meet in person. Is that OK?" (At this point, you complete the Buyer Lead Sheet to further determine their wants and needs)

When you search for homes online, would it be a benefit to know what your down payment and monthly payments would be based upon each home's asking price?"

"To most people, it's more important to know what their monthly payments would be when initially selecting home search criteria, not to mention later on while they are comparing homes that they are actively searching for online. Does that make sense to you?"

"Depending on the type of loan program you select the down payment and monthly payment amounts can vary significantly. I can have my lender give you a call before we meet to help you get a rough idea of what each of these amounts will be based upon the loan programs you might select. There will be absolutely no cost or obligation on your part, it will just help you get more clarity about the homes you actually want to see in your online search. How does that sound?"

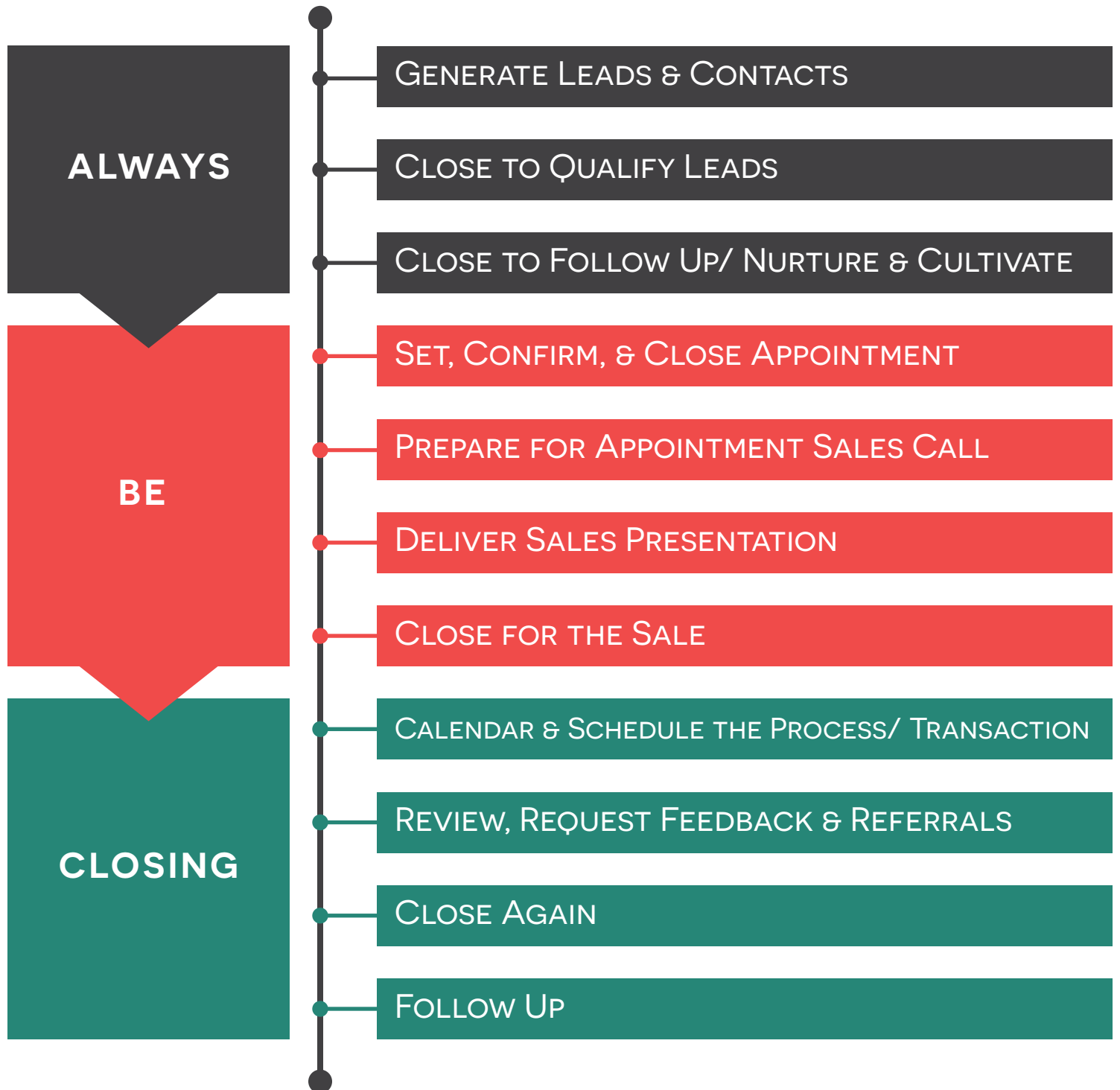
"Not to mention, if you do see a home that's priced well, it will likely sell quickly. So, having your financial ducks in a row with a lender pre-qualification letter to provide to the sellers to increase the likelihood of your offer being accepted. Make sense?"

"Great! Here's my lender's name and number. I will provide your contact information to her as well. This way you can both start trying to get in touch with one another prior to our meeting. Then we will be able to further refine your online home search based upon what you learn from her. Sound good?"

"Wonderful. I'm looking forward to meeting you in person!"

# ALWAYS BE CLOSING

## PHASES FLOWCHART



# PRESENTATION CLOSING

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Presentation Section	Close?	Their Commitment
What's happened up until now	YES	YES, then...
What their goals are	YES	YES, then...
What your goals are for the presentation, and the relationship	YES	YES, then...
What the risks are, and plans to avoid them	YES	YES, then...
Your process, systems, and team	YES	YES, then...
The prices and terms	YES	YES, then...
The entire plan, and "closing remarks"	YES	YES, then...

## EXERCISE: WHO ARE YOU TALKING TO?

Let's experiment with what you've learned so far with a few prospecting audiences you may come in contact with. Choose a closing style that you would use in each scenario and make a note of points you would highlight when using that style or model on the prospect.

Scenario	Model or Style	What Points You'll Highlight
Close for a Referral with a SOI member		
Close with an SOI member for an Appointment		
Close with a Prospect for a Buyer Consultation		
Close with a Prospect for a Buyer Representation Agreement		
Close for a Listing Presentation		
Close for a FSBO Property Preview		
Close for an Expired Listing Appointment		
Close for a Follow Up call with details about an Unlisted Home		

# CLOSING STYLE GALLERY

<b>Adjournment Close</b> - give them time to think.	<b>Handover Close</b> - someone else does the final close.
<b>Affordable Close</b> - ensuring people can afford what you are selling.	<b>Handshake Close</b> - offer handshake to trigger automatic reciprocation.
<b>Alternative Choice Close</b> - offering a limited set of choices.	<b>Humor Close</b> - relax them with humor.
<b>Artisan Close</b> - show the skill of the designer.	<b>IQ Close</b> - say how this is for intelligent people.
<b>Ask-the-Manager Close</b> - use manager as authority.	<b>Minor points Close</b> - close first on the small things.
<b>Assumptive Close</b> - acting as if they are ready to decide.	<b>Never-the-best-time Close</b> - for customers who are delaying.
<b>Balance-sheet Close</b> - adding up the pros and the cons.	<b>No-hassle Close</b> - make it as easy as possible.
<b>Best-time Close</b> - emphasize how now is the best time to buy.	<b>Now-or-never Close</b> - to hurry things up.
<b>Bonus Close</b> - offer something extra not discussed to clinch the deal.	<b>Opportunity Cost Close</b> - show cost of not buying.
<b>Bracket Close</b> - make three offers - with the target in the middle.	<b>Ownership Close</b> - act as if they own what you are selling.
<b>Calculator Close</b> - use calculator to do a time or money discount.	<b>Price-promise Close</b> - promise to meet any other price.
<b>Calendar Close</b> - schedule the next steps in a calendar to set the pace.	<b>Quality Close</b> - sell on quality, not on price.
<b>Companion Close</b> - sell to the person with them.	<b>Rational Close</b> - use logic and reason.
<b>Compliment Close</b> - flatter them into submission.	<b>Repetition Close</b> - repeat a closing action several times.
<b>Concession Close</b> - give them a concession in exchange for the close.	<b>Requirements Close</b> - write down what they want as a formal requirement.
<b>Conditional Close</b> - link closure to resolving objections.	<b>Retrial Close</b> - go back to square one.

# CLOSING STYLE GALLERY

<b>Cost of Ownership Close</b> - compare cost over time with competitors, or cost of not doing anything.	<b>Selective-deafness Close</b> - respond only to what you want to hear.
<b>Customer-care Close</b> - the Customer Care Manager calls later and re-opens the conversation.	<b>Shopping List Close</b> - tick off list of their needs.
<b>Daily Cost Close</b> - reduce cost to daily amount.	<b>Similarity Close</b> - bond them to a person in a story.
<b>Demonstration Close</b> - show them the goods.	<b>Standing-room-only Close</b> - show how others are queuing up to buy.
<b>Diagram Close</b> - Draw a picture that draws them in.	<b>Summary Close</b> - tell them all the things they are going to receive.
<b>Doubt Close</b> - show you doubt the product and let them disagree.	<b>Testimonial Close</b> - use a happy customer to convince the new customer.
<b>Economic Close</b> - help them pay less for what they get.	<b>Thermometer Close</b> - they score out of ten, you close gap.
<b>Emotion Close</b> - trigger identified emotions.	<b>Treat Close</b> - persuade them to 'give themselves a treat.'
<b>Empathy Close</b> - empathize with them, share a similar personal experience then close.	<b>Trial Close</b> - see if they are ready for a close.
<b>Exclusivity Close</b> - not everyone can buy this.	<b>Ultimatum Close</b> - show negative consequences of not buying.
<b>Extra Information Close</b> - give them more info to tip them into closure.	<b>Valuable Customer Close</b> - offer them a special 'valued customer' deal.
<b>Extra Information Close</b> - give them more info to tip them into closure.	<b>Yes-set Close</b> - get them saying 'yes' and they'll keep saying 'yes'.
<b>Future Close</b> - close on a future date.	<b>Trial Close</b> - see if they are ready for a close.
<b>Give-Take Close</b> - give something, then take it away.	<b>Ultimatum Close</b> - show negative consequences of not buying.
<b>Golden Bridge Close</b> - make the only option attractive.	<b>Valuable Customer Close</b> - offer them a special 'valued customer deal.

# CLARIFY QUALIFY CLOSE

01

**CLARIFY**

02

**QUALIFY**

03

**CLOSE**

- ① Clarify the objection, concern, or question by parroting or repeating their words back to them.  
*Eg. "So it sounds to me like you don't want to list your home for sale until you find a property you want to buy? Is this the only thing you're unsure about, or are there other issues we can address here, too?"*
- ② Qualify the objection, concern, or question by confirming that if you can solve the issue then they will definitely move forward.  
*Eg. "So, if we are able to find you a home you want to buy, you will then be ready to list your property for sale? Once we get clear on this, will you be ready to move forward?"*
- ③ Close by stating the action you need them to take to move to the next step.  
*Eg. "How about we meet so we can sit down and help you get full realtor access to better help you find a property to buy, so we can ultimately list your property for sale?"*



# CHAPTER 13

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Name: \_\_\_\_\_ Date: \_\_\_\_\_

	Name	Ask for Appt?	Appt?	Ask for Referral	Referral?	Follow Up/Notes
1.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
2.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
3.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
4.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
5.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
6.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
7.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
8.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
9.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
10.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
11.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
12.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
13.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
14.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
15.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
16.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
17.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
18.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
19.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
20.		<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	

**TOTALS:** \_\_\_\_\_

**Total Contacts Made:** \_\_\_\_\_ **Total Referrals Received:** \_\_\_\_\_ **Total Appointments Made:** \_\_\_\_\_

Name: \_\_\_\_\_ Date: \_\_\_\_\_

	Type*	Name & Phone	Ask for Appt?	Appt?	Ask for Referral	Referral?	Follow Up/Notes
1.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
2.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
3.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
4.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
5.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
6.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
7.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
8.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
9.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
10.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
11.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
12.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
13.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
14.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
15.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
16.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
17.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
18.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
19.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	
20.			<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	<input type="checkbox"/> Y / <input type="checkbox"/> N	<input type="checkbox"/>	

**TOTALS:** \_\_\_\_\_

\*Type: SOI, FSBO, Expired/Cancelled, Circle Prospecting, Online Lead, etc.

**Total Contacts Made:** \_\_\_\_\_

**Total Appointments Made:** \_\_\_\_\_

**Total Leads Referred:** \_\_\_\_\_

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Type*	Name	Phone Number	Email	Address	Price Point	Bed/Bath	Subdivision	Notes

**Calls Made:** FSBO: \_\_\_\_\_ EXPIRED: \_\_\_\_\_ CANCELLED: \_\_\_\_\_ CIRCLE: \_\_\_\_\_ SPHERE: \_\_\_\_\_  
**Contact Made:** FSBO: \_\_\_\_\_ EXPIRED: \_\_\_\_\_ CANCELLED: \_\_\_\_\_ CIRCLE: \_\_\_\_\_ SPHERE: \_\_\_\_\_  
**Total Contacts Made:** \_\_\_\_\_ **Total Appointments Made:** \_\_\_\_\_

Date: \_\_\_\_\_ Lead Source: \_\_\_\_\_

Name: \_\_\_\_\_ Spouse Name: \_\_\_\_\_

Property Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone #s – Mobile: \_\_\_\_\_ Spouse Mobile: \_\_\_\_\_ Home: \_\_\_\_\_ Work: \_\_\_\_\_

Email: \_\_\_\_\_ Spouse Email: \_\_\_\_\_

Family / Children (include ages): \_\_\_\_\_

1. Have any other agents shown you homes? ☐ Yes ☐ No  
If Yes, do you have a signed agency agreement? ☐ Yes ☐ No
2. Is anyone buying the home with you? \_\_\_\_\_
3. Are you renting, or do you own a home? ☐ Homeowner ☐ Renter
  - a) HOMEOWNER:
    - Do you need to sell your home before you buy? ☐ Yes ☐ No
    - Have you signed a listing agreement to sell your home? ☐ Yes ☐ No
  - b) RENTER:
    - When does your lease end? \_\_\_\_\_
4. What date do you want to be moved by? \_\_\_\_\_
5. Are there any negatives to not moving by then? (suggest lifestyle sacrifices, job, costs, schools, family, etc.)  
\_\_\_\_\_
6. Tell me all the benefits of buying a new home: (dig deep & find out WHY?)  
\_\_\_\_\_
7. On a scale of 1 to 10, how would you rank your motivation to move? With 10 meaning you must buy as quickly as possible, and 1 meaning you're not sure you'll really buy anything: \_\_\_\_\_
  - What's missing? What would it take to make you a 10? \_\_\_\_\_
8. Do you know where you want to move to? \_\_\_\_\_
9. Will you be paying cash or getting a mortgage? ☐ Cash ☐ Mortgage
10. Have you been pre-approved by a lender? ☐ Yes ☐ No
11. How much will your down payment be? \_\_\_\_\_
12. What price range are you looking in? \_\_\_\_\_
13. How many BR: \_\_\_\_\_ Baths: \_\_\_\_\_ SqFt: \_\_\_\_\_ Stories: \_\_\_\_\_ Other: \_\_\_\_\_
14. What else are you looking for in a home? \_\_\_\_\_
15. Will anyone else be involved in your home buying decision? \_\_\_\_\_
16. "Thank you! I'd love to help you find your perfect home. All that we need to do is to set an appointment so that I can help you find the home you're looking for. Does 4:30 tomorrow or 5:00 Wednesday work for you?"

Appointment Date/Time: \_\_\_\_\_

DISC Behavioral Profile: \_\_\_\_\_ Why? \_\_\_\_\_

Date: \_\_\_\_\_

Name: \_\_\_\_\_ Spouse Name: \_\_\_\_\_

Property Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone #s – Mobile: \_\_\_\_\_ Spouse Mobile: \_\_\_\_\_ Home: \_\_\_\_\_ Work: \_\_\_\_\_

Email: \_\_\_\_\_ Spouse Email: \_\_\_\_\_

Family / Children (include ages): \_\_\_\_\_

1. Have you spoken with any other agents? ☐ Yes ☐ No \_\_\_\_\_
2. Have you considered selling the home yourself? ☐ Yes ☐ No \_\_\_\_\_
3. Why do you want to move? \_\_\_\_\_
4. Do you know where you want to move to? \_\_\_\_\_
5. What date do you want to be moved by? \_\_\_\_\_
6. Are there any negatives to not moving by then? (suggest lifestyle sacrifices, job, costs, schools, family, etc.)  
\_\_\_\_\_
7. Tell me all the negatives of not moving at all? (same suggestions above)  
\_\_\_\_\_
8. Tell me all the benefits of buying a new home: (dig deep & find out WHY?)  
\_\_\_\_\_
9. On a scale of 1 to 10, how would you rank your motivation to move? With 10 being highly motivated: \_\_\_\_\_
10. When did you buy your home? \_\_\_\_\_ What price did you pay? \_\_\_\_\_
11. Do you know how much you still owe on it? \_\_\_\_\_
12. Have you made any major improvements to the home since? ☐ Yes ☐ No  
\_\_\_\_\_
13. Do you happen to have an idea as to what you think it's worth, or should sell for? \_\_\_\_\_
14. Do you have a price you won't sell your home below? \_\_\_\_\_
15. Tell me about the positive & negative features of your home:  
\_\_\_\_\_
16. How many BR: \_\_\_\_\_ Baths: \_\_\_\_\_ SqFt: \_\_\_\_\_ Stories: \_\_\_\_\_ Other: \_\_\_\_\_
17. How did you hear about me/us? \_\_\_\_\_
18. Are you interviewing any other agents? ☐ Yes ☐ No Who? \_\_\_\_\_ When? \_\_\_\_\_
19. "Thank you! The next step is for me to take a quick look at your home and I can answer any other questions you may have. Then you can decide what we do next. How does that sound?" (pause)  
"Great! Does 4:30 tomorrow or 5:00 Wednesday work for you?"

Appointment Date/Time: \_\_\_\_\_

DISC Behavioral Profile: \_\_\_\_\_ Why? \_\_\_\_\_

# BUYER INVENTORY

## Buyer Agency Agreements (BAA) Signed

Client	Agent	Pre-Qualified/Lender	City/Area	Source	Price Target	BAA Signed	BAA Expires	Status
1 Mark Fisher	Melissa	Yes- HomePlus Mortgage	NW/SW Visalia	Robyn SOI	\$400,000	11/14/17	11/14/18	Actively looking
2 Steve Ensslin	Melissa	No- HomePlus trying to contact	Visalia	Melissa SOI	\$550,000	11/17/17	6/4/18	Shown 15 homes. Actively looking
3 Dan & Karen Holloway	Kari	Yes- CC Mortgage	Springville	Open House	\$495,000	2/26/18	6/26/18	Actively looking
4 Maria Focha	Melissa	Yes- CC Mortgage	NE Tulare	Agent Referral	\$225,000	3/13/2018	6/8/18	Looking for 2 acre lot
5 Matt Kelly	Jessica	Yes- HomePlus Mortgage	Exeter	Robyn SOI	\$514,900	3/16/2018	5/9/18	Still can not make contact to reschedule
6 Ricardo Mora & Sylvia Lopez	Kari	No- Trying to connect w/ CC Mortgage	NW Visalia	Website	\$210,000	3/22/18	9/18/18	Still deciding between us & agent Uncle
7 Brian and Kara Martinez	Melissa	Cash	Visalia	Melissa SOI	\$208,000	3/28/2018	9/21/18	Still remodeling bathroom. List when done
8 Ron & Linda Watts	Melissa	Yes- CC Mortgage	Tulare	Website	\$350,000	2/26/18	2/25/19	Waiting for summer school break.
9 Don Evans	Kari	Yes- CC Mortgage	W Visalia	Kari SOI	\$425,000	3/13/2018	3/12/19	May/June
10 James & Maggie Wilson	Melissa	Yes- CC Mortgage	Visalia	Website	\$310,000	3/16/2018	3/15/19	Canceled/Reschedule
11 Debra Mattoon	Melissa	Yes- CC Mortgage	Tulare	Robyn SOI	\$475,000	3/22/18	10/21/18	Waiting on tenants to vacate
12 Dan & Abbie Johnson	Kari	Cash	Visalia	Robyn SOI	\$850,000	3/28/2018	3/27/19	Waiting on tenants to vacate
13 Jerry Washington	Melissa	Yes- Valley Credit Union	Visalia	Website	\$500,000	2/26/18	2/25/19	Sellers unsure if moving forward at this point
14 Jim & Cindy Stephens	Jessica	Yes- HomePlus Mortgage	Porterville	Open House	\$285,000	3/13/2018	3/12/19	early to mid May
15 Sarah Watson	Logan	No - Trying to connect w/ HomesPlus	Visalia	Website	\$350,000	11/14/17	11/13/19	Dead for now. Wating till next year or so
16 Maggie Henderson	Tasha	Yes- HomePlus Mortgage	SW Visalia	Website	\$500,000	11/17/17	11/16/18	Canceled & rescheduled for 4/15
17 Jessica Tulane	Melissa	Yes- HomePlus Mortgage	W Visalia	Open House	\$285,000	2/26/18	2/25/19	May 3rd appointment
18 Mike & Angela Fountain	Melissa	Yes- CC Mortgage	Three Rivers	Melissa SOI	\$350,000	3/13/2018	3/12/19	Actively looking
19 Terry Wilkenson	Jessica	No - appointment w/ CC mortgage set	Visalia	Website	\$425,000	3/16/2018	3/15/19	Meeting Lender this week
20 Brandon Ames	Kari	Yes- CC Mortgage	NW Visalia	Robyn SOI	\$400,000	3/22/18	3/21/19	Actively looking

### Totals - BAA Signed & Active

Melissa	10
Kari	5
Jessica	3
Logan	1
Tasha	1
TOTAL	20

## Active Buyer Leads - No BAA Signed, But Actively Looking

Client	Agent	Pre-Qualified/Lender	City/Area	Source	Price Target	Status
1 Andrew Sema	Melissa	No	Exeter	Rob SOI Ref	\$375,000	Still can not make contact to reschedule
2 Thomas and Sherry Ferreira	Kari	No	Porterville	Website Lead	\$425,000	Still deciding between us and Uncle who is an agent
3 David & Lindsay Johnson	Melissa	Yes- HomePlus Mortgage	NW/SW Visalia	Open House	\$400,000	Still remodeling bathroom. Ready to list when done
4 Susan and Terry Malhman	Melissa	No- HomePlus trying to contact	Visalia	Robyn SOI	\$550,000	Waiting for summer school break.
5 Bill and Marina Meek	Kari	Yes- CC Mortgage	Springville	Farm	\$495,000	May/June
6 Terra Walker	Melissa	Yes- CC Mortgage	NE Tulare	Zillow Lead	\$225,000	Canceled/Reschedule
7 Jerry Davis	Jessica	No	Exeter	Open House	\$514,900	Waiting on tenants to vacate
8 Jerry Davis	Kari	Yes- Cousin is a lender	NW Visalia	Open House	\$210,000	Waiting on tenants to vacate
9 Miguel and Crystal Sanchez	Melissa	No	Visalia	Robyn SOI	\$208,000	Sellers unsure if moving forward at this point
10 Rafael and Sylvia Arzate	Jessica	Yes- CC Mortgage	Visalia	Robyn SOI	\$425,000	early to mid May
11 Albert Limon	Tasha	No	Tulare	Website Lead	\$310,000	Dead for now. Wating till next year or so
12 Brad Vickers	Logan	Yes- HomePlus Mortgage	Visalia	Robyn SOI	\$475,000	Canceled & rescheduled for 4/15
13 Daniel Snead	Melissa	No	Visalia	Kari SOI	\$850,000	May 3rd appointment
14 Christine Akers	Kari	Cash	Porterville	Website	\$500,000	Sellers unsure if moving forward at this point
15 Neil & Paula Brockmeier	Jessica	No	Visalia	Website	\$285,000	early to mid May
16 Jake & Winsome Ullman	Logan	No	SW Visalia	Website	\$350,000	Dead for now. Wating till next year or so
17 Dan & Debbie Cote	Jessica	Yes- CC Mortgage	W Visalia	Website	\$425,000	Canceled & rescheduled for 4/15
18 Julian Werts	Kari	Yes- CC Mortgage	Three Rivers	Kari SOI	\$400,000	May 3rd appointment
19 Tom & Christy Blue	Melissa	No	Exeter	Open House	\$650,000	Actively looking
20 Ryan Atkinson	Jessica	Cash	Visalia	Jessica SOI	\$550,000	Meeting Lender this week

# LISTING INVENTORY

## Active Listings

	Client	Buyer too?	Address	City, Zip	Agent	Source	List Price	List Date	DOM	LA Expires	Today
1	Mark Fisher	Yes	1701 S. Crumal St.	Visalia 93292	Robyn	Robyn SOI	\$159,900.00	11/14/17	235	11/14/18	7/7/2018
2	Steve Ensslin	Yes	143 Carmelita St.	Pville 93257	Kari	Kari SOI	\$329,000.00	11/17/17	232	6/4/18	7/7/2018
3	Dan & Karen Holloway	Maybe	2067 Linda Vista Ave.	Pville 93257	Kari	Open House	\$495,000.00	2/26/18	131	6/26/18	7/7/2018
4	Maria Focha	No	1104 S Whitney	Visalia 93277	Robyn	Agent Referral	\$225,000.00	3/13/2018	116	6/8/18	7/7/2018
5	Matt Kelly	Yes	763 Park Place Ct	Exeter 93221	Robyn	Robyn SOI	\$514,900.00	3/16/2018	113	5/9/18	7/7/2018
6	Ricardo Mora & Sylvia Lopez	No	996 E San Joaquin	Tulare 93274	Kari	Website	\$210,000.00	3/22/18	107	9/18/18	7/7/2018
7	Brian and Kara Martinez	Yes	1955 W Wall Ave	Pville 93257	Kari	Kari SOI	\$208,000.00	3/28/2018	101	9/21/2018	7/7/2018

## Listing Agreement Signed & Waiting to Go Active

	Client	Buyer too?	Address	City, Zip	Agent	Source	LA Signed	LA Expires	Notes
1	Hayley Tashjian	Yes	216 N. Orange Ave.	Exeter 93221	Robyn	Melissa SOI	3/25/18	3/24/19	Active on 4/15
2	April Black	No	2720 W. Caldwell Ave.	Visalia 93277	Kari	Kari SOI	1/31/18	12/31/18	Active on 4/26
3	Barbara (Heaher Saddler)	Yes	3529 W. Howard	Visalia 93277	Robyn	Robyn SOI	3/5/2018	9/4/18	Waiting for yard rennovation
4	Miguel Sanchez	Yes	39 Brook Street	Visalia 93291	Robyn	Rob PC Ref	3/15/2018	12/31/18	Active on 5/1

## Listing Leads - No Listing Agreement Signed Yet

	Client	Buyer too?	Address	City, Zip	Agent	Source	Status
1	Andrew Serna	Yes	794 Sheffield Ave.	Exeter 93221	Robyn	Rob SOI Ref	Still can not make contact to reschedule
2	Thomas and Sherry Ferreira	Yes	1704 Cotton Ct.	Visalia 93291	Robyn	Website Lead	Still deciding between us and Uncle who is an agent
3	David & Lindsay Johnson	Yes	2822 W. Border Links	Ivanhoe 93292	Kari	Open House	Still remodeling bathroom. Ready to list when done
4	Susan and Terry Mahman	Yes	15016 Avenue 312	Visalia 93291	Robyn	Robyn SOI	Waiting for summer school break.
5	Bill and Marina Meek	No	5837 W. Stewart Ave.	Visalia 93291	Robyn	Farm	May/June
6	Terra Walker	Maybe	1802 Marroneto Circle	Tulare 93274	Robyn	Zillow Lead	Canceled/Reschedule
7	Jerry Davis	No	24006 Road 224	Lindsay 93247	Kari	Open House	Waiting on tenants to vacate
8	Jerry Davis	No	1825 E Fir St	Lindsay 93247	Kari	Open House	Waiting on tenants to vacate
9	Miguel and Crystal Sanchez	Maybe	2823 W Brooke Ave	Visalia 93291	Robyn	Robyn SOI	Sellers unsure if moving forward at this point
10	Rafael and Sylvia Arzate	Yes	3613 E. Harvard Ct.	Visalia 93292	Robyn	Robyn SOI	early to mid May
11	Albert Limon	Yes	1032 E. Academy Ave.	Tulare 93274	Robyn	Website Lead	Dead for now. Wating till next year or so
12	Brad Vickers	No	4106 S. Bridge St.	Visalia 93277	Robyn	Robyn SOI	Canceled & rescheduled for 4/15
13	Daniel Snead	No	3145 W. Ashland Ave.	Visalia 93277	Kari	Kari SOI	May 3rd appointment



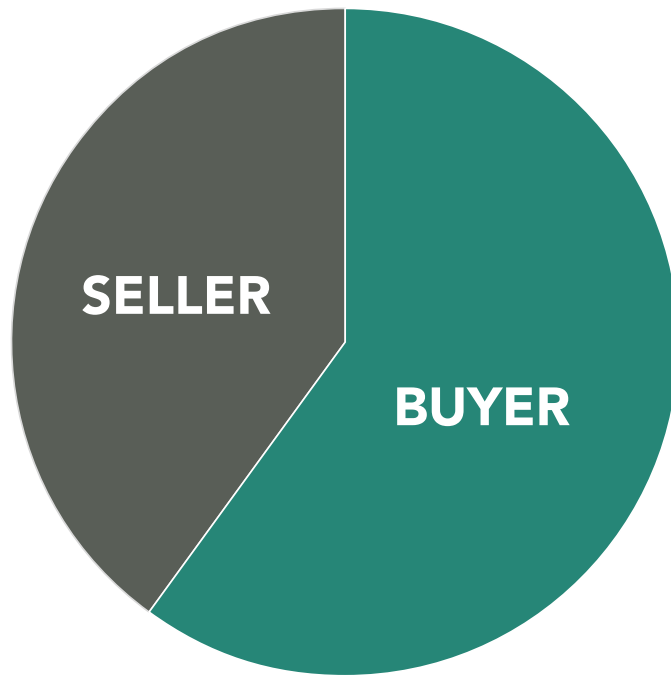
# PENDING INVENTORY PIPELINE

	Client	B or S	Address	City, Zip	Agent	Source	Price	Open	Close Date	Total GCI	Notes
1	William and Erica Pine	Buyer	1600 Palm Dr.	Exeter 93221	Melissa	Melissa SOI	\$500,000	12/21/18	4/19/18	\$13,500	
2	Luis Guerrero	Buyer	2148 W. Union Ave.	Porterville 93257	Melissa	Website	\$255,000	1/9/18	4/11/18	\$5,558	
3	Chris and Crystal Smith	Buyer	14663 Avenue 344	Visalia 93292	Melissa	Robyn SOI	\$685,000	2/12/18	4/12/18	\$12,813	
4	Carly Heinzen-Woods	Seller	813 W. Reese Ct.	Visalia 93277	Robyn	Robyn PC	\$224,900	2/15/18	4/13/18	\$6,900	Ray Jones (Uncle) 949-555-1243
5	Jennifer De Mascio	Buyer	813 W. Reese Ct.	Visalia 93277	Melissa	Robyn PC	\$350,000	2/15/18	4/13/18	\$6,900	
6	Henry Hash	Seller	644 W. Loyola Ave.	Visalia 93277	Kari/Robyn	Kari Expired	\$249,700	2/22/18	3/23/18	\$6,250	
7	Henrique Guerreiro	Seller	1000 Belmont	Porterville 93257	Robyn	Robyn SOI	\$205,000	2/23/18	4/9/18	\$6,150	
8	Jessica De Mascio	Seller	1025 Princeton Ave.	Visalia 93277	Robyn	Robyn SOI	\$219,900	3/1/18	4/13/18	\$6,810	
9	Gary Garret	Seller	1331 Laura Ct	Visalia 93292	Kari	Kari FARM	\$389,000	3/15/18	5/21/18	\$6,900	Also buying
10	Gary Garret	Buyer	381 S Beverly	Porterville 93257	Kari	Kari FARM	\$310,000	3/21/18	5/1/18	\$5,125	Also listing/selling
11	Florence Ann Webster	Seller	2400 W Midvalley	Visalia 93277	Kari	Kari PC	\$885,500	9/21/18	12/31/19	\$14,000	
12	Daniel Snead	Seller	3145 W Ashland	Visalia 93277	Kari	Open House	\$249,000	9/22/18	12/31/19	\$7,100	
13	Donnie Brandon	Seller	401 N. Powell	Visalia 93291	Robyn	Robyn SOI	\$814,900	3/13/18	12/31/19	\$16,200	
14	Scott and Kirsten Hyder	Buyer	131 W Putnam	Porterville 93257	Kari	Kari PC	\$750,000	3/27/18	5/21/18	\$18,400	
15	Samuel Velasquez	Buyer	893 San Ramon	Visalia 93292	Melissa	Website	\$350,000	3/28/18	4/26/18	\$8,900	Melissa's cousin
16	David & Mel Johnson	Seller	2822 Border Links	Visalia 93291	Robyn	Robyn SOI	\$750,000	2/25/18	4/16/18	\$14,750	
17	Kimmy Berkley	Seller	236 Feemster Ct	Visalia 93277	Robyn	Open House	\$550,000	2/29/18	4/13/18	\$9,550	
18	John & Dani Kale	Buyer	145 Beverly Glen	Visalia 93277	Kari	Website	\$350,000	3/1/18	4/1/18	\$7,525	
19	Mark & Donna Griffel	Seller	856 N. Fairway	Visalia 93291	Robyn	Robyn SOI	\$655,500	3/5/18	4/25/18	\$11,500	
20	Omar & Katie Vaz	Seller	435 Keogh Dr.	Visalia 93291	Robyn	Website	\$450,000	2/15/18	4/6/18	\$7,000	
21	Katherine Florentine	Buyer	231 Park Place	Porterville 93257	Kari	Kari SOI	\$350,000	3/13/18	5/12/18	\$6,250	
21	Larry Burke	Buyer	259 Hyde Way	Tulare 93234	Melissa	Melissa SOI	\$250,000	3/18/18	5/2/18	\$6,800	Tenant's occupying property
22	Larry Burke	Buyer	1342 Ames Ct.	Exeter 93221	Melissa	Melissa SOI	\$259,000	3/26/18	5/14/18	\$7,450	

## CLIENTELE PIE CHART

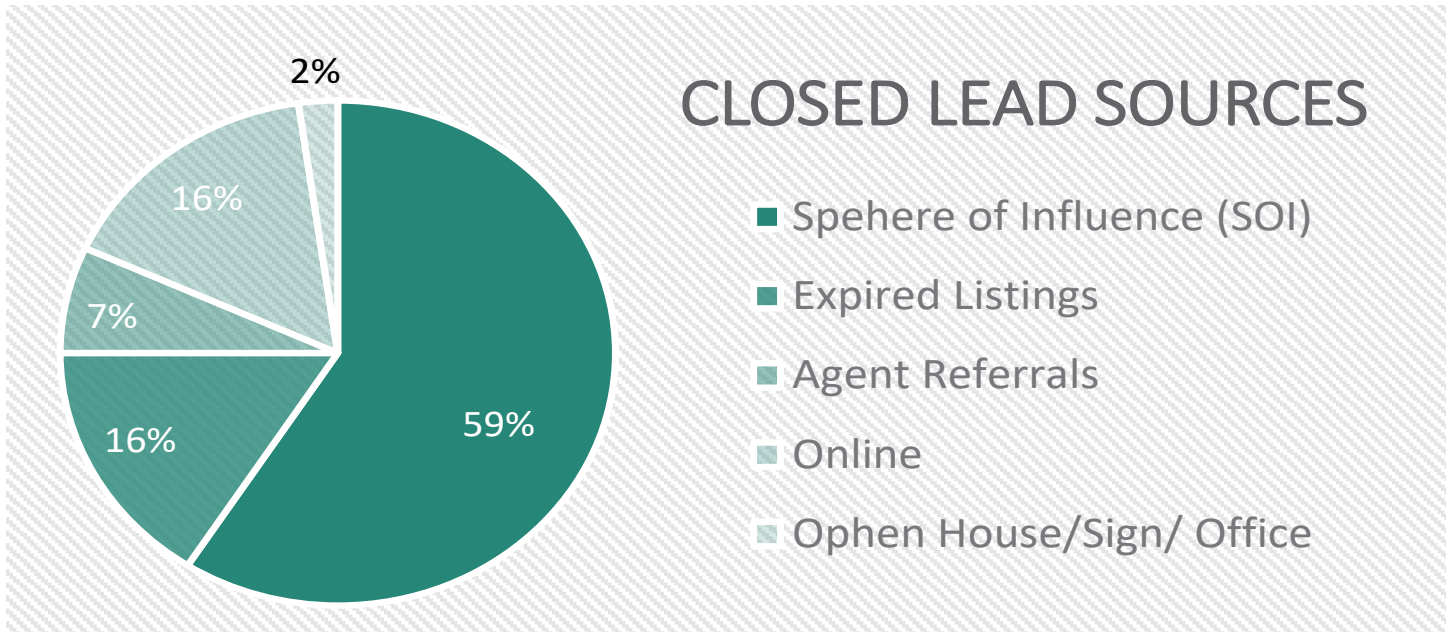
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### CLIENTELE



## CLOSED LEAD SOURCES PIE CHART

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Example WIG: \$325,000

	Annual	Monthly	Weekly
Number of contracts (@ \$7500 GCI each)	43	3.6	.9
Number of prequalified leads			
Number of property previews			
Number of SOI Database contacts:			

**Calculate the effort you need to put in to make YOUR number become a reality.**

WIG: _____	Annual	Monthly	Weekly
Number of contracts (@ \$7500 GCI each)	_____	_____	_____
Number of prequalified leads	_____	_____	_____
Number of property previews	_____	_____	_____
Number of SOI Database contacts:	_____	_____	_____

## MY CONVERSION RATIOS

1. My gross commission income goal for this year is: \_\_\_\_\_
2. My average gross commission last year was: \_\_\_\_\_  
(divide your last year's gross commission by the number of sides that you closed)
3. To reach my goal of \_\_\_\_\_ (#1), I will need to do (#1/#2) transactions this year: \_\_\_\_\_ transactions
4. Last year, I went on ( ) listing appointments: \_\_\_\_\_ listing appointments
5. Last year, I listed ( ) properties: \_\_\_\_\_ properties
6. Last year I sold ( ) listings: \_\_\_\_\_ listings
7. (Divide #6 by #4)  
My closing percentage on listings sold compared to listing appointments taken is: \_\_\_\_\_ closing %  
(This helps you calculate how many appointments are needed to reach your goal.)
8. This year, I want to close on ( ) listings: \_\_\_\_\_ listings
9. (Divide #8 by #7)  
**Figuring that my closing % will continue to be \_\_\_\_\_ % (#7), I will need to go on ( ) listing appointments to close on \_\_\_\_\_ (#8) listings:** \_\_\_\_\_ listing appointments
10. Last year, I met with ( ) potential buyers: \_\_\_\_\_ potential buyers
11. Last year I worked with ( ) buyers: \_\_\_\_\_ buyers
12. Last year, I sold homes to ( ) buyers: \_\_\_\_\_ Buyers
13. (Divide #12 by #10)  
My closing percentage on buyers closed compared to buyers I initially met with is: \_\_\_\_\_ closing %  
(This helps you calculate how many buyer appointments are needed to reach your goal.)
14. This year, I want to sell homes to ( ) buyers: \_\_\_\_\_ buyers
15. (Divide #14 by #13)  
**Figuring that my closing % will continue to be \_\_\_\_\_ % (#13), I will need to go on ( ) buyer appointments to sell homes to \_\_\_\_\_ (#14) buyers:** \_\_\_\_\_ buyer appointments

Note: "Last year" refers to the past 12 months

## MY PRODUCTION PLANNING

Now divide #9 (number of listing appointments needed) by the number of months you will work this year & number of weeks you will work this year for listing appointments needed below.

*(Note: there are 12 months & 52 weeks in a year)*

Now divide #15 (number of buyer appointments needed) by number of months you will work this year & number of weeks you will work this year for buyer appointments needed below.

Listing Appointments:	Per Month	Per Week
New Buyers:	Per Month	Per Week
<b>Total:</b>	0 <b>Per Month</b>	0 <b>Per Week</b>

**My Gross Income Goal (GIG) for this year (from #1) is:**

\_\_\_\_\_

**I NEED TO CREATE \_\_\_\_\_ 0 \_\_\_\_\_ APPOINTMENTS PER WEEK**

**I NEED TO CREATE \_\_\_\_\_ 0 \_\_\_\_\_ APPOINTMENTS PER MONTH**

# CHAPTER 14

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## SAMPLE ACCOUNTABILITY SCHEDULE

Time	Monday	Tuesday	Wednesday	Thursday	Friday
9AM-12PM	Business Generation Activities (SOI/Expired)	Business Generation Activities (SOI/Expired)	Business Generation Activities (SOI/Expired)	Business Generation Activities (SOI/Expired)	Business Generation Activities (SOI/Expired)
12PM-1PM	Lead Follow-Up	Lead Follow-Up	Lead Follow-Up	Lead Follow-Up	Lead Follow-Up
1PM-2PM	Accountability Advocate Appointment	Lunch	Lunch	Lunch	Lunch
3PM-5PM	Business Generation Activities (Property Previews/FSBOs)	Business Generation Activities (Property Previews/FSBOs)	Business Generation Activities (Property Previews/FSBOs)	Business Generation Activities (Property Previews/FSBOs)	Business Generation Activities (Property Previews/FSBOs)
6PM	All Paperwork/Tracking Forms Completed?	All Paperwork/Tracking Forms Completed?	All Paperwork/Tracking Forms Completed?	All Paperwork/Tracking Forms Completed?	All Paperwork/Tracking Forms Completed?
7PM					Email Accountability Agenda to coach@aol.com



# CHAPTER 15

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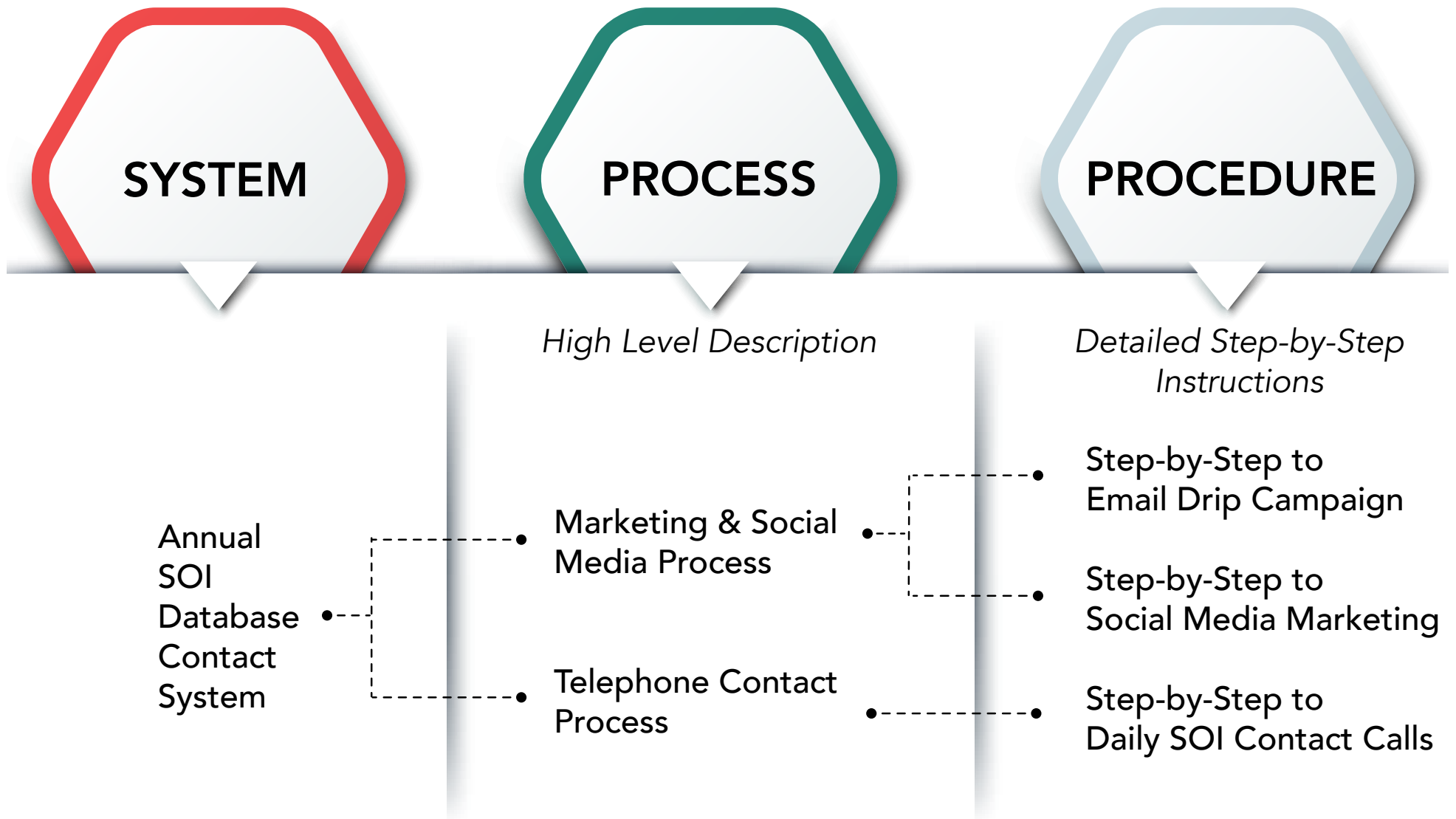
## EXERCISE: WHAT SKILLS?

Take a moment to review the table below. The top bar categorizes five different areas that are crucial for prospecting success: Pipeline Development, Building Relationships, Sales Development, Winning the Business, and Sales Management. Within each of those categories are some related skillsets.

On a scale of 1-5, rank your confidence and expertise when it comes to the listed skills. For any skillset that you rate as a one or zero, pay close attention and hone in on that in your 18-month plan and start improving and moving those scores to five as fast as humanly possible.

Pipeline Development	Building Relationships	Sales Development	Winning the Business	Sales Management
Market Intelligence RANK: ____	Breaking the Ice RANK: ____	Understanding the Decision-Making Process RANK: ____	High Impact Presentations RANK: ____	Interlocking prospect for long term commitment RANK: ____
Target Qualification RANK: ____	Creating Credibility RANK: ____	Creating Reasons for Prospect to Switch Agents RANK: ____	Negotiating RANK: ____	Asking for Referrals & Recommendations RANK: ____
Reverse Planning RANK: ____	High Value Questioning, Probing, Listening RANK: ____	Linking your Solutions to Prospect's Needs RANK: ____	Overcoming Objections RANK: ____	Sustainable Relationships RANK: ____
Appointment Making RANK: ____	Identifying Prospect's Unique Wants & Needs RANK: ____	Leveraging Relationships RANK: ____	Closing RANK: ____	Next Step Clarification RANK: ____
Sales Meeting & Plan Objectives RANK: ____	Qualifying Opportunities & Consequences RANK: ____	Excellent grasp of core values of your business and services RANK: ____	Use of Trial Closes RANK: ____	Efficient communication systems RANK: ____
Your Value Proposition RANK: ____	Excellent Listening Skills RANK: ____	Product/Service Demonstration Skills RANK: ____	Confidence to Assume the Sale RANK: ____	Patience and Attentiveness RANK: ____

## SYSTEM, PROCESS, PROCEDURE



## EXERCISE: ARE YOU SUFFICIENTLY SYSTEMATIZED?

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Are your daily prospecting activities part of a seamless system of processes and procedures? Are you at a level where you know how to do something but it is not efficiently and effectively automated and you have to manually remind and motivate yourself to do it? Identify the areas and prospecting activities that need the most urgent attention and think about the systems, processes, and procedures you need to create and implement to take your business to the next level.

Activity	Process	Procedure	System
Calling SOI			
Follow Up Calls			
Previewing Property			
Creating Plan for the Week			
Outlining Next Steps			
Showing Homes			

## EXERCISE: 12-MONTH GOALS

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To create your 12-month goals, you need to look ahead but plan backward. Called *Pull Planning*, this new approach asks you to identify a future goal or project and work the goal or project in reverse order. Pull planning allows you to identify your action steps in detail. When you can visualize the details of what will make your plan successful, you are more likely to experience success in achieving it.

You can create as many goals as you want. You definitely want to create a specific and measurable Production Growth Goal, but you may also want to make a next level commitment by getting your broker's license which would include completing various education courses and sitting for the test. Whatever your goal is, make sure to break it out into manageable monthly, weekly, and daily steps.

- Write down the final goal.
- 

This is the exact thing that you want to see happen 12 months from now.

- Plan the monthly milestones, or mini-goals, that will make your final goal a reality.


- Create your plan for the week.
- 
-

## EXERCISE: 12-MONTH GOALS

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- Review weekly progress. If you are meeting your goals, keep doing what you are doing. If you are unable to meet the milestones, use the Four Key Accountability Questions to reflect on your progress. You may also want to discuss what's going on with your accountability advocate or your coach. The reflection part of this piece is critical to your success. Reflection will help you come up with solutions for getting back on track.
- Adjust as necessary\*. Afterwards, you may find that you are exceeding your expectations and meeting goals more quickly. If you are not meeting your milestones, and you've spoken with your accountability advocate or your coach, you must develop a plan of action to get yourself back on track.

\* Others on your team also need ownership in the process; their insight can be invaluable.

# REAL ESTATE TEAM

## PRODUCTION GROWTH BUDGET SCHEDULE

Total Sales Volume	\$8 Million	\$13 Million	\$18 Million	\$25 Million	\$40 Million	\$60 Million	\$80 Million	\$100 Million
GCI	\$240,000	\$390,000	\$540,000	\$750,000	\$1.2 Million	\$1.8 Million	\$2.4 Million	\$3 Million
Units (Divide Sales Vol by Your Avg Home Price)								
OPERATING EXPENSES								
Administrative Salaries (12%)	\$28,800	\$46,800	\$64,800	\$90,000	\$144,000	\$216,000	\$288,000	\$360,000
Marketing & Lead Generation (10%)	\$24,000	\$39,000	\$54,000	\$75,000	\$120,000	\$180,000	\$240,000	\$300,000
Training & Education (5%)	\$12,000	\$19,500	\$27,000	\$37,500	\$60,000	\$90,000	\$120,000	\$150,000
Equipment & Supplies (2%)	\$4,800	\$7,800	\$10,800	\$15,000	\$24,000	\$36,000	\$48,000	\$60,000
Rent (0.5%)	\$1,200	\$1,950	\$2,700	\$3,750	\$6,000	\$9,000	\$12,000	\$15,000
Misc. (0.5%) Technology	\$1,200	\$1,950	\$2,700	\$3,750	\$6,000	\$9,000	\$12,000	\$15,000
Total Operating Expenses (30%)	\$72,000	\$117,000	\$162,000	\$225,000	\$360,000	\$540,000	\$720,000	\$900,000
Cost of Sales (Deductions from Commissions Checks to pay brokerage + sales agents)	\$24,000 (10%)	\$58,500 (15%)	\$108,000 (20%)	\$187,500 (25%)	\$360,000 (30%)	\$540,000 (30%)	\$840,000 (35%)	\$1.2 Million (40%)
NET INCOME	\$144,000 (60%)	\$214,500 (55%)	\$270,000 (50%)	\$337,500 (45%)	\$480,000 (40%)	\$720,000 (40%)	\$840,000 (35%)	\$900,000 (30%)

\*All percentages calculated as a percentage of Gross Commission Income (GCI)