



TomFerry

ROADMAP

Tag Tom on your social posts



@TomFerry



@TomFerry



@TomFerry



@TomFerry



@TomFerry



@TomFerry



@TomFerry

@TomFerry

@Ferryintl

#FerryIntl

#TomFerry



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partners!**

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Huge "Thank You"
to Our Friends at
PalmAgent
For Sponsoring
Today!

PalmAgent

Real Estate's #1 Closing Cost App

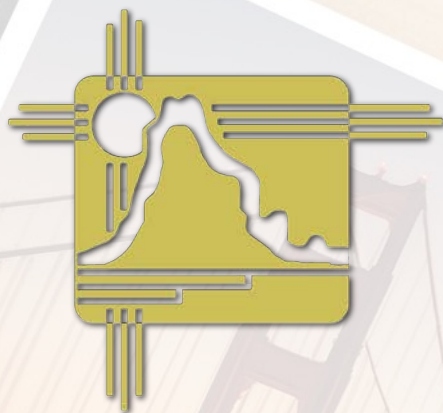


Albuquerque Roadmap

Thank your
title partner!



Fidelity
National Title
of New Mexico Inc



San Juan Title

“Where Good Deeds Get Done”

Why Are You Here?

I want YOU to win,
MORE!

Here's the Problem...

4.05% of agents
Listed **51%** of all homes YTD.

What sets them apart?

- 1. It's a must... not a "want to"**
- 2. They're more consistent with marketing & follow up.**
- 3. They have the skills to win the listing.**

OUTCOMES:

- ☐ Attract & Win More Listings!
- ☐ Get out of my head & into action!
- ☐ Improve my skills!
- ☐ Win your fee's with buyers!
- ☐ Get Organized & Prioritized!
- ☐ Have Fun!



Emily TERRELL

📍 **SAN ANTONIO, TX**

📁 **Exp REALTY**

GCI 3 Years Total: **951,000**

Volume 3 Years Total: **43M**

Units 3 Years Total: **135**





Jimmy **MACKIN**



Q: Do I believe I'm capable
of doing more business?

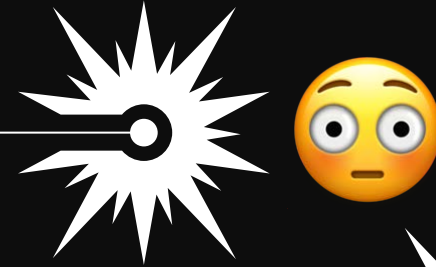
Q: What obstacles will I face?

Obstacles

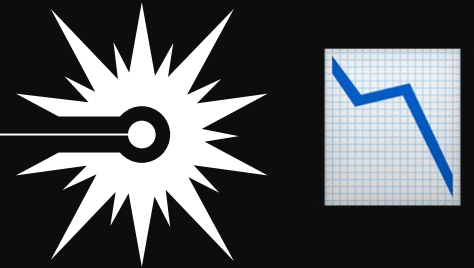
to overcome!

Four converging forces impacting 2024

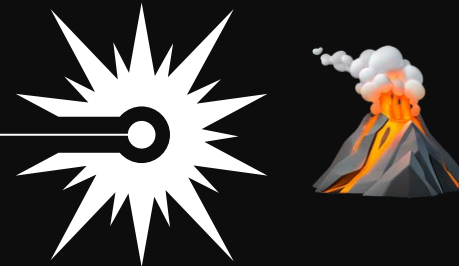
AN ELECTION YEAR



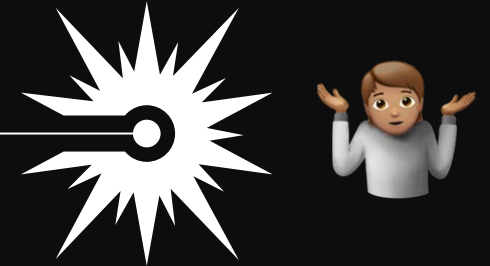
THE RATES



PENT UP DEMAND



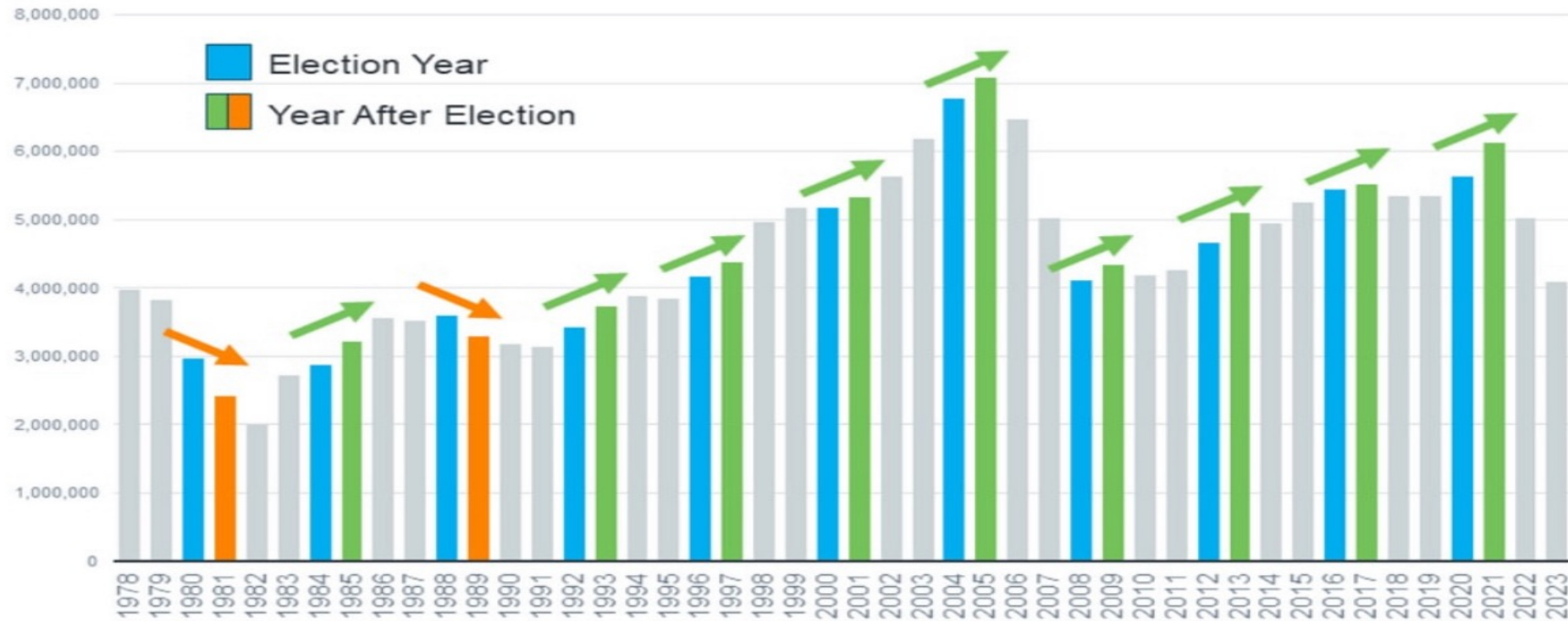
LACK OF INVENTORY



What do we
know...

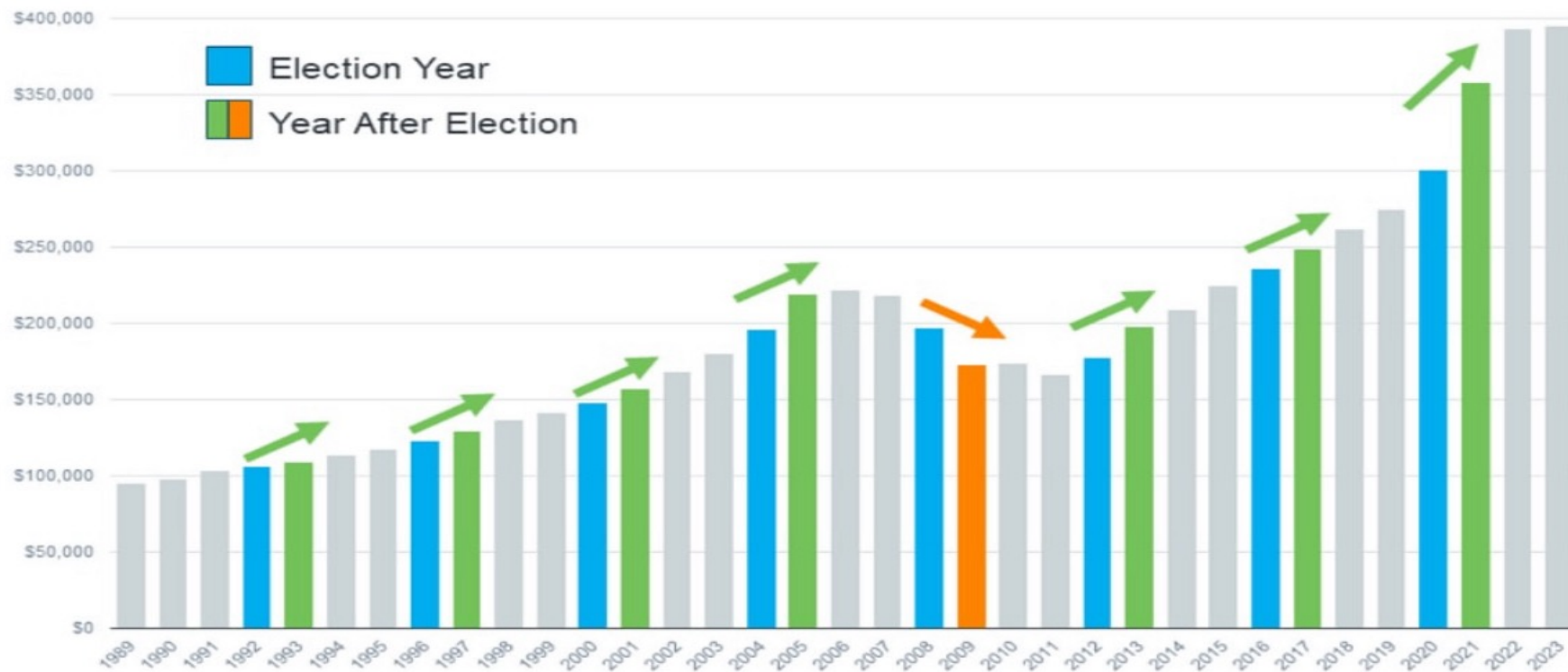
HOME SALES WENT UP AFTER 9 OF THE LAST 11 PRESIDENTIAL ELECTIONS

U.S. Annual Existing Home Sales



HOME PRICES WENT UP AFTER 7 OF THE LAST 8 PRESIDENTIAL ELECTIONS

U.S. Annual Median Sales Price of Existing Single-Family Houses Sold



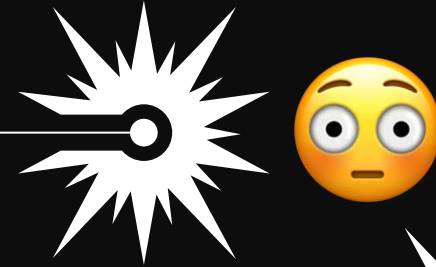
MORTGAGE RATES DECREASED LEADING UP TO 8 OF THE LAST 11 PRESIDENTIAL ELECTIONS

Change from July to November of Recent Election Years

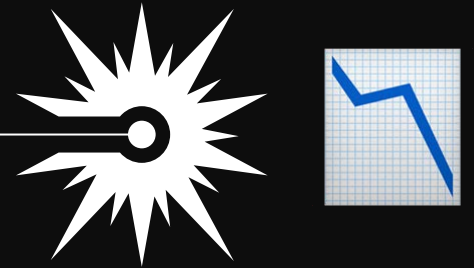
Election Year	Change	Difference
1980	12.19% to 14.21%	+2.02%
1984	14.67% to 13.64%	-1.03%
1988	10.43% to 10.27%	-0.16%
1992	8.13% to 8.31%	+0.18%
1996	8.25% to 7.62%	-0.63%
2000	8.15% to 7.75%	-0.40%
2004	6.06% to 5.73%	-0.33%
2008	6.43% to 6.09%	-0.34%
2012	3.55% to 3.35%	-0.20%
2016	3.44% to 3.77%	+0.33%
2020	3.02% to 2.77%	-0.25%

Four converging forces impacting 2024

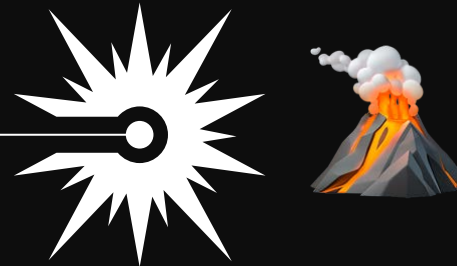
AN ELECTION YEAR



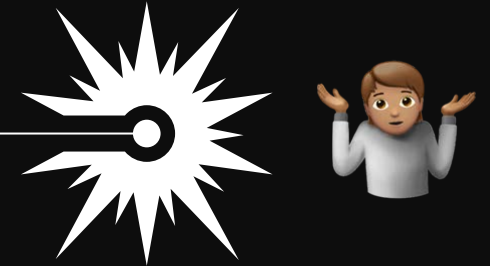
THE RATES



PENT UP DEMAND



LACK OF INVENTORY



Most Believe...

**This is THE MARKET
For the Next 2 to 3 Years**

Who Took all the Listings in 2023?

1,550,000+ agents in 2023

ONLY **5,239** agents sold 45+ listings in 2023

197,591 agents sold 5 to 44 listings in 2023

1,300,000 agents sold 4 or LESS listings in 2023

4,100,000 homes sold in 2023

AGENT

49% of agents sold either 1 home or none at all in the past year: CFA

Agent 'glut' means part-timers are now the majority, leading to 'widespread incompetence and pressure to maintain high commission rates,' according to the Consumer Federation of America



**Who's taking all the
Listings from Jan to
April 2024?**

Who's Taking all the Listings from Jan to April 2024?

1,111,200	= 0 listings	
327,900	= 1 to 4	= 542,283
45,000	= 5 to 10	= 276,675
15,000	= 11 to 20	= 143,871
2,500	= 21 to 30	= 55,335
900	= 31 to 44	= 33,201
750	= 45+	= 66,402

IT'S THE REAL ESTATE HUNGER GAMES...

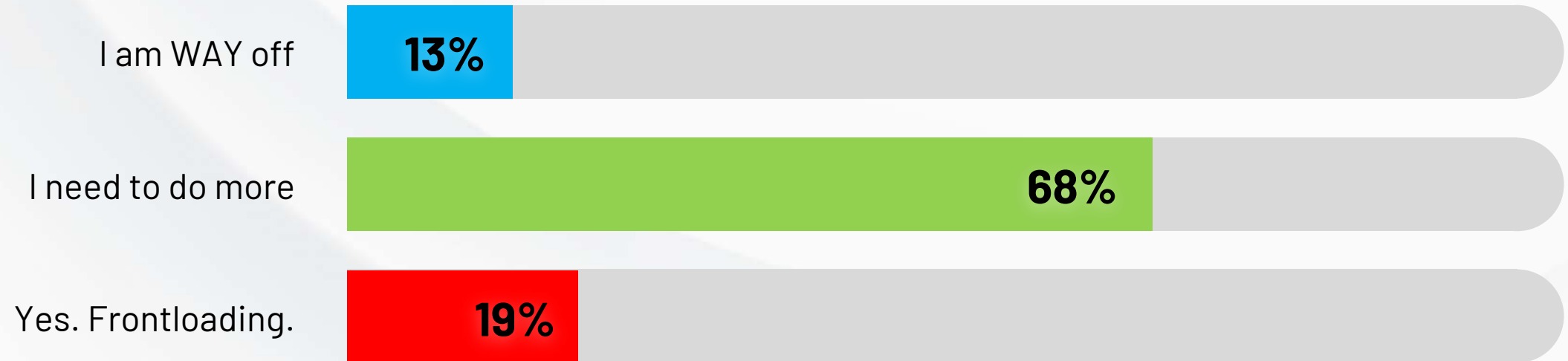




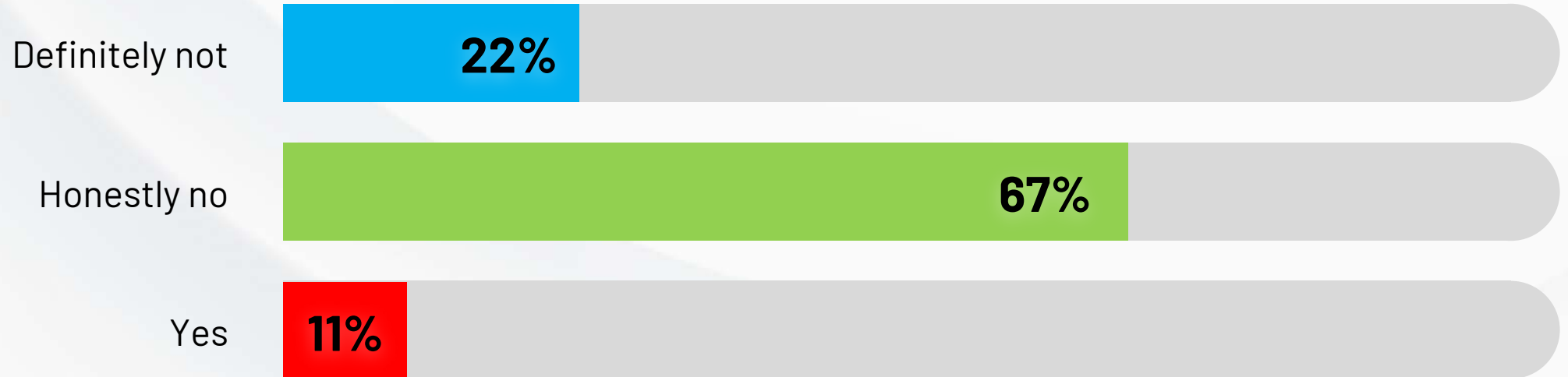
**“What have I learned
after 3 decades & 70,000
hours of coaching?”**

**We just surveyed
11,000 agents**

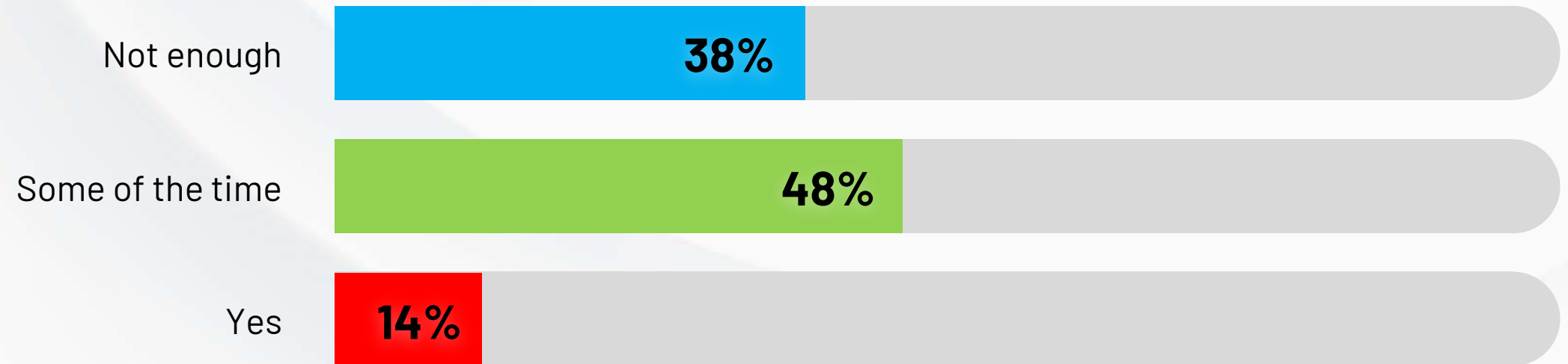
AM I MARKETING ENOUGH?



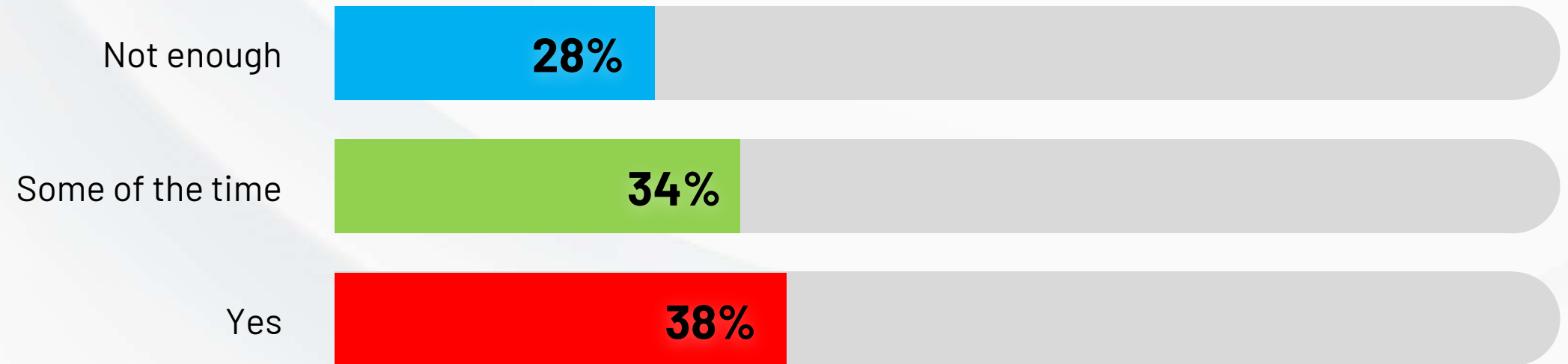
AM I PROSPECTING ENOUGH?



AM I ON SCHEDULE?



DO I FOLLOW UP ENOUGH?





SO WHERE ARE
YOU **STUCK?**

Business, at its purest is,

**Attention &
Monetization**

Q

What's the **MOST** under marketed asset by agents?

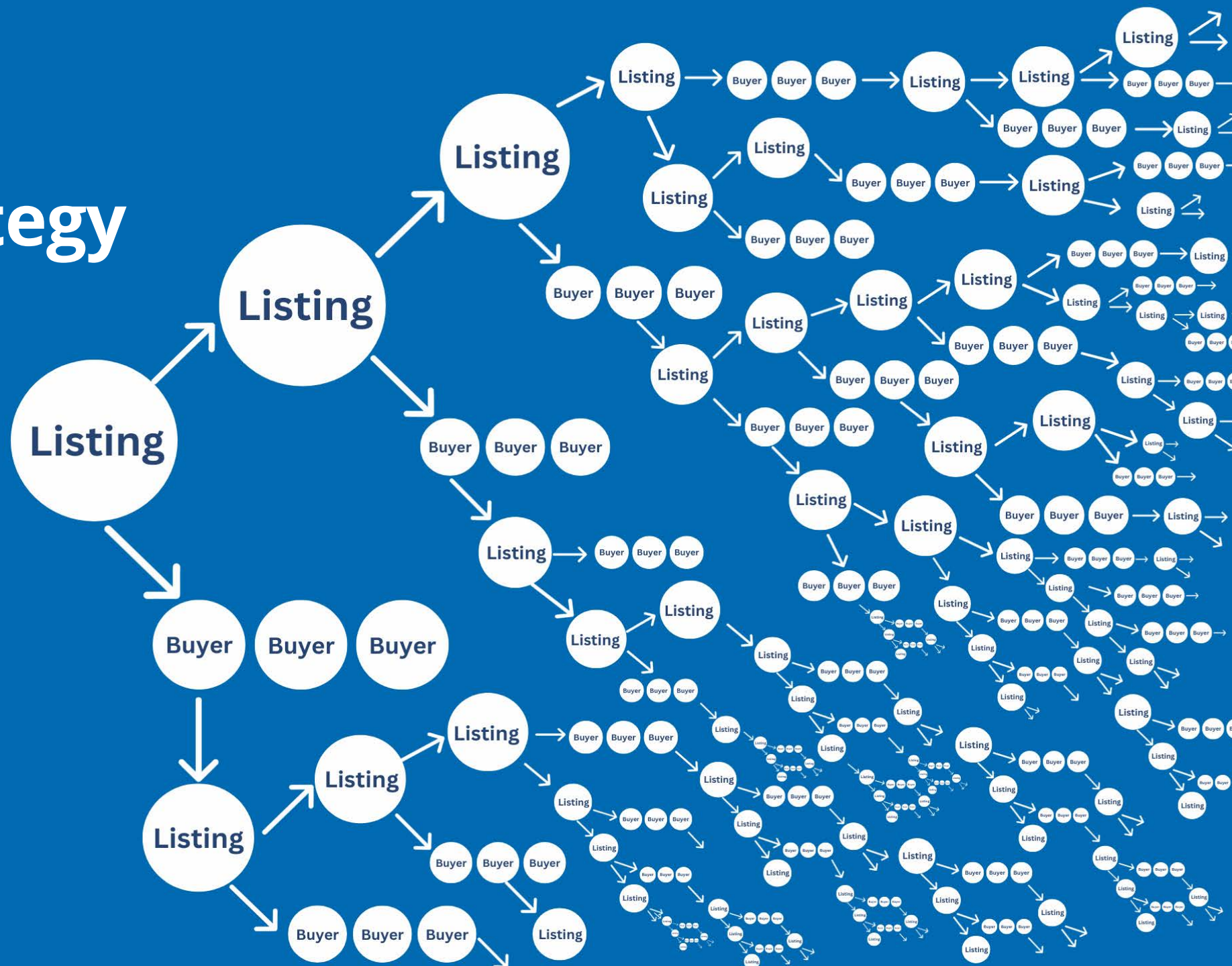
Listing Attraction, Marketing & Prospecting?



MORE Listings, from
my Listings, by creating
MORE Attention!

“When was the last time you
took the time to Reimagine
how you market your listings
to generate **MORE!?**”

The Viral Listing Strategy



BUILD YOUR LISTING FLYWHEEL



How do I turn one into 2 listings?

Email your whole data base before your next listing



"I'm about to go meet with another potential seller..."



Subject Line: : I'm about to go meet a potential seller..

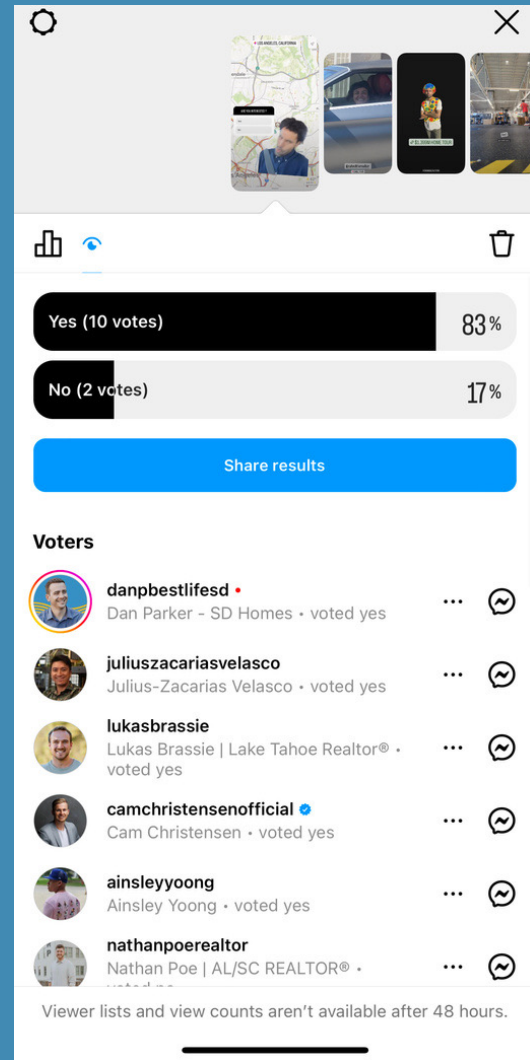
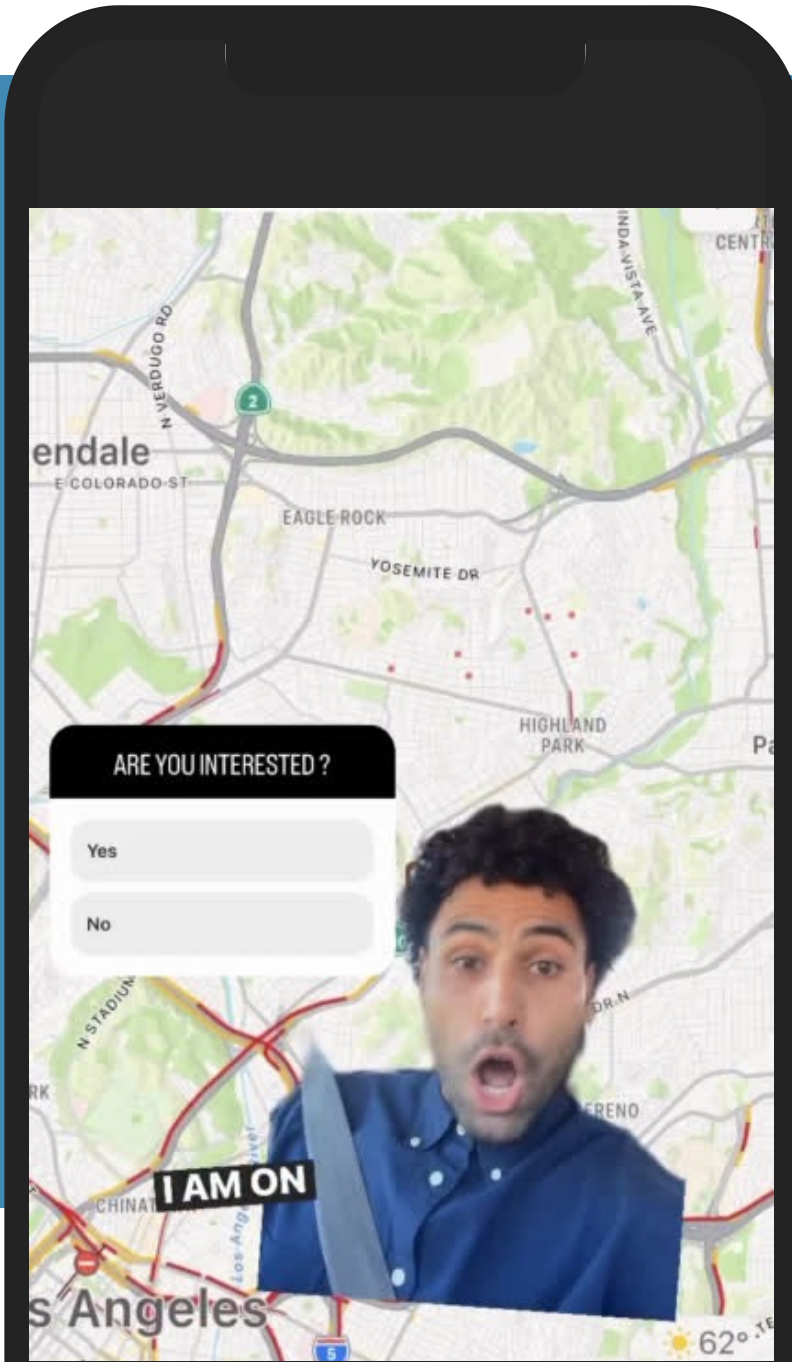
I can't share too much yet, but I'm about to meet up with a potential seller who's thinking about listing their home.

What I can tell you is that homes like this typically sell above ask in just a few days
If you already know that you'll want the details, reply with "VIP."

I'll add you to my VIP list, and send you more information as soon as I can.



Tell them what
happens next



Convert the email to a "story" for even more engagement

Attention: Turn one into 2 listings?

1. Email your whole data base before your next listing appointment "I'm not sure if this is for you..."
2. Throw a Mega Open House for the neighbors!
3. Mail a "first time on the market in (x) years" mailer
4. If the properties "HOT" host a 8 hour open house!
5. Build an LP with all the details of the listing sale For pre and post marketing.
6. Do an Instagram posts "How many buyers will write an offer on this home?" and "Guess what this sold for?" with prizes.
7. How we did it Mailer (*aka a just sold mailer*) with a QR code.



WHO YOU WORK WITH MATTERS!
A home is worth what a buyer is willing to pay for it. The wrong agent and the wrong strategy will cost you thousands of dollars. Call Robert Mack if you're interested in selling while the market is still in your favor!

How We Did It!

WEEK 1

CONTRACTOR PROPOSALS

- » Bulk Item Removal
- » Design/Staging
- » Pre-listing termite inspection
- » Grout cleaning and paint touch up

WEEK 2

SELLER PREPARATION

- » Minor Repairs Made
- » Grout cleaning and painting
- » Removal of all personal belongings
- » Light cosmetic upgrades

WEEK 3

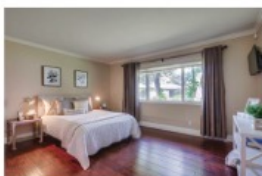
DESIGN PROJECT+ PRE-MARKETING

- » Fully stage to show like a model home
- » Initiate coming soon marketing campaign

WEEK 4

ON MARKET

- » 22 Point RMG Modern Marketing Plan
- » Aggressive pricing strategy to maximize home exposure
- » Maximize accessibility
- » On Demand private showings
- » Open Houses



THE RESULT OF SUPERIOR MARKETING FOR 17402 JACARANDA AVE

**Dozens of people at the open
houses opening weekend**

**Over 1,000 views on Zillow,
Realtor.com and Redfin**

Sold for \$46,000 above asking

Listed \$995,000

Sold \$1,036,000

**SOLD FOR
RECORD
PRICE!**

The Robert Mack Group | 949.209.7309

Let the Robert Mack Group help you
with your next BIG lifestyle change...

RMG
ROBERT MACK GROUP

fiv REALTY
NEWPORT BEACH, CA

PRE-SORTED
STANDARD
U.S. POSTAGE
PAID
CORONA, CA
PERMIT NO. 789



Robert Mack

Broker Associate

(949) 209-7309

robertm@robertmackgroup.com

www.robertmackgroup.com

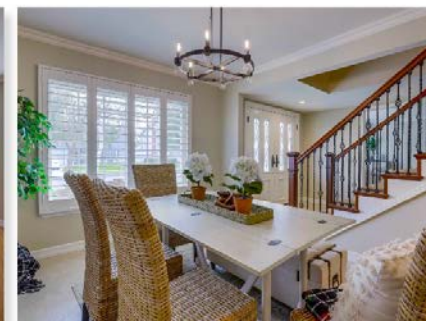
CalBRE: 01734565

This is not intended to solicit listed property. If your property is currently listed for sale with a broker, please disregard. Equal Housing Opportunity.

**SOLD
FOR
RECORD
PRICE!**

Who you work with matters!

A home is worth what a buyer is willing to pay for it. The wrong agent and the wrong strategy will cost you thousands of dollars. Call Robert Mack if you're interested in selling while the market is still in your favor!



Request your free home evaluation
with NO STRINGS ATTACHED →



RMG
ROBERT MACK GROUP

fiv REALTY
NEWPORT BEACH, CA

Attentio: Turn one into 2 listings?

8. Invite all neighbors to your next “Home Selling Seminar”.
9. A letter (hand addressed and hand stamped) magic buyer letter. We have more buyers and no inventory.
10. “Did You Hear About Your Neighbor” mailer with a QR code

Did you
hear about
your neighbor?

Scan here to find out!



PRESCRIPTED
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REAL MARKETING

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**Creates
Curiosity!**



Did you
hear about
your neighbor?

Scan here to find out!



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REAL MARKETING

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5,700
mailed.
1952 scans.
37 full
form fills.
1.89%



The **MONEY** is in the
Landing Page!

YOUR NEIGHBOR
JUST SOLD \$119,000
OVER LIST PRICE!



HERE'S THE STORY...



YOUR NEIGHBOR CALLED
US...



...looking to make a move out of state, and
wanting to **maximize the value of their
home**

AA stephanieyounger.com



HERE'S THE STORY...

YOUR NEIGHBOR CALLED
US...

...looking to make a move out of state, and
wanting to **maximize the value of their
home**.

WE GOT TO WORK

Our project manager created and executed a
plan focused on **strategic home
improvements**.



0% FINANCING

Our clients didn't have to come out-of-pocket
for their home makeover by using our
interest-free financing.

A BUZZWORTHY LAUNCH

Our marketing team created a special ev...
that **attracted 120+ active buyers**.



MULTIPLE OFFERS

3 days after the launch event we **received 8**

stephanieyounger.com — Private

MASTERFUL NEGOTIATION

Our listing team used an **offer deadline** to
create urgency and countered the strongest
offers on **price and terms**.

FAST & EFFICIENT ESCROW

Our escrow team handled every step of the
process and was able to close in 12 business
days - **50% faster than usual**.

SUCCESSFUL CLOSE

Through our comprehensive process and
team of specialists, we helped our clients
achieve **25% more per foot than the most
recent comparable sale**.



8429 REGIS WA'

*Our team's marketing strategy and
implementation resulted in these sweet
results;*



stephanieyounger.com — Private

8429 REGIS WAY

*Our team's marketing strategy and
implementation resulted in these sweet
results;*

\$119,000

Over The Asking Price

11

Offers



8

Days on Market

\$1,418,429

Sold Price



\$1,189

Price Sold Per Sq Ft



🔒 stephanieyounger.com — Private

48,673

Total Media Views

DO YOU HAVE A
SIMILAR GOAL?

Let's chat.



Name

Email

Phone

Address



By providing The Stephanie Younger Group your contact information, you acknowledge and agree to our [Privacy Policy](#) and consent to receiving marketing communications,

🔒 stephanieyounger.com — Private



STEPHANIE Younger

@Compass
Los Angeles

YouTube Commercials

The screenshot displays the Google Ads 'New campaign' setup page. The central focus is a preview of a YouTube video ad. The ad features a man with a beard and a 'Skip Ad' button. The interface includes a top navigation bar with icons for Search, Reports, Tools & Settings, Billing, and Help. On the left, there are sections for 'Create your ad', 'Your YouTube channel', and 'Video ad format' with options for Skippable, Video, and Bumper ads. The right side shows performance metrics like 'Performance', 'Settings, daily', 'Impressions', and 'Budget spend'.

Google Ads | New campaign

SEARCH REPORTS TOOLS & SETTINGS BILLING ?

1 Create your ad

YouTube

Your YouTube channel

Video ad format

☒ Skippable
☐ Video
☐ Bumper

The following video ad is shown in-stream ad

https://

Display URL
TomFerry.co

☐ Call-to-action

Ad URL

Companion link

☒ Autogenerated
☐ Upload

Ad name
Ad #1

Performance
Settings, daily
Impressions
Budget spend

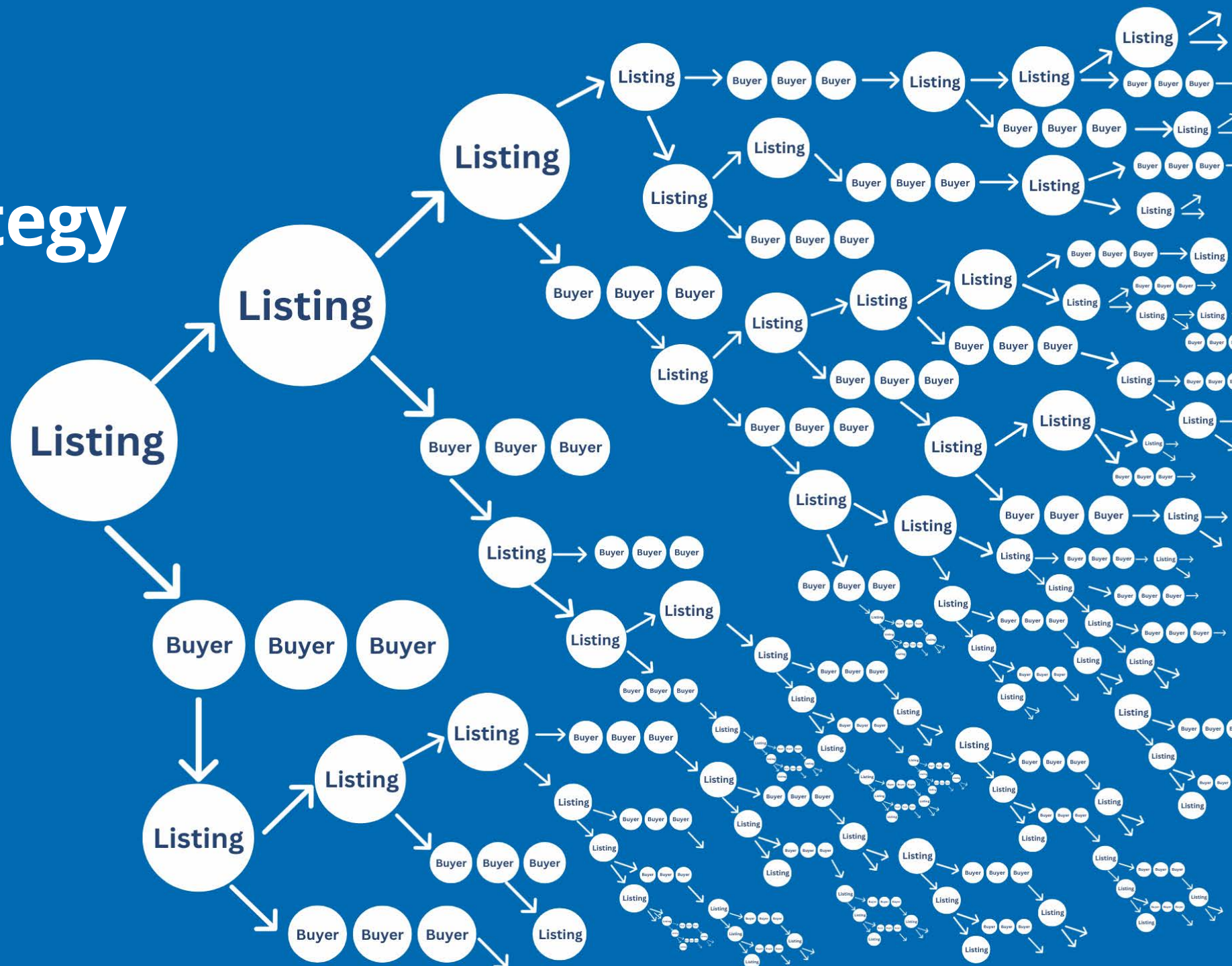
SHANE BURGMAN



Attention: Turn one into 2 listings?

8. Invite all neighbors to your next "Home Selling seminar".
9. A letter (hand addressed and hand stamped) magic buyer letter. We have more buyers and no inventory.
10. "Did You Hear About Your Neighbor" mailer with a QR code
11. Circle dial around recent listings sold. "Did you hear about your neighbor?"
12. Social/display ads. YouTube ads about the story of selling the home
13. Call every FSBO/Expired near by "Did you see what happened to 1272 Banana street?"

The Viral Listing Strategy





**How will I create
MORE Attention?**



Q: How many clients & sphere vs prospects in my database?

5% From Life Events



Diapers



Death



Diamonds



Divorce



Diplomas



Defaults

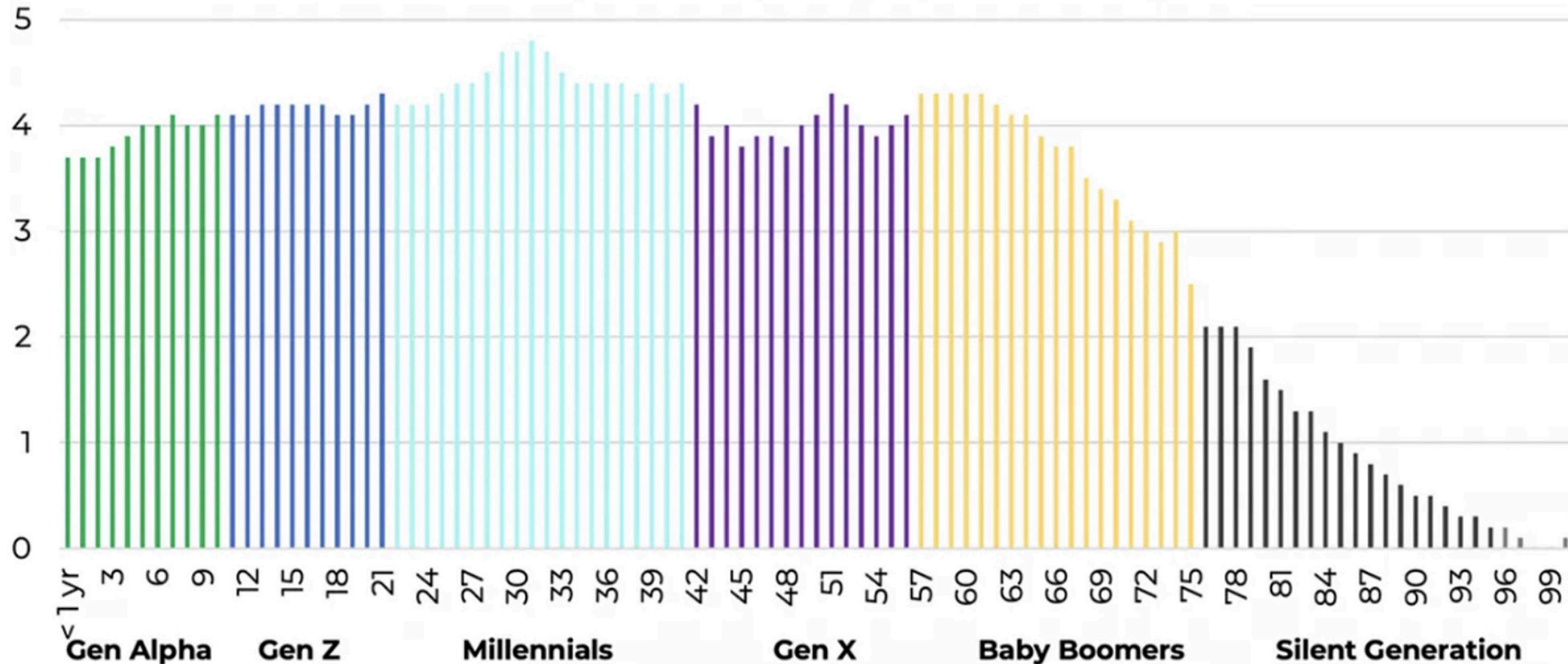


D'Relocation



Generational Cohorts - at a glance

U.S. Population by Age (in millions)



Source: U.S. Census

“Every **listing**,
every **sale** and
every **appointment**
starts with a
conversation.”

(Time **TO START MORE** of them)



Meaningful, valuable, personal conversations



Lead to discussions of the next move



Leads to listing appointments



Generates listings



They all ask:

**How's the
real estate
market?**

Homeowners ask about the market,
But what they really want to know...

“Is my equity safe?”

“Appreciation or depreciation?”

& “How will this market effect my future plans?”



**Want the
easiest way to
DELIVER VALUE
AND ELEGANTLY
DISCOVER who's
considering
making a move?**



How Much Equity Did You Gain?



How much equity did you gain in 2023?

I'm setting aside a few hours this week to put together home equity reports for my clients.

These reports are more comprehensive and accurate than what you'd get from an online tool.

Can I send you one for your home?

Let me know!

Happy New Year,
Jimmy

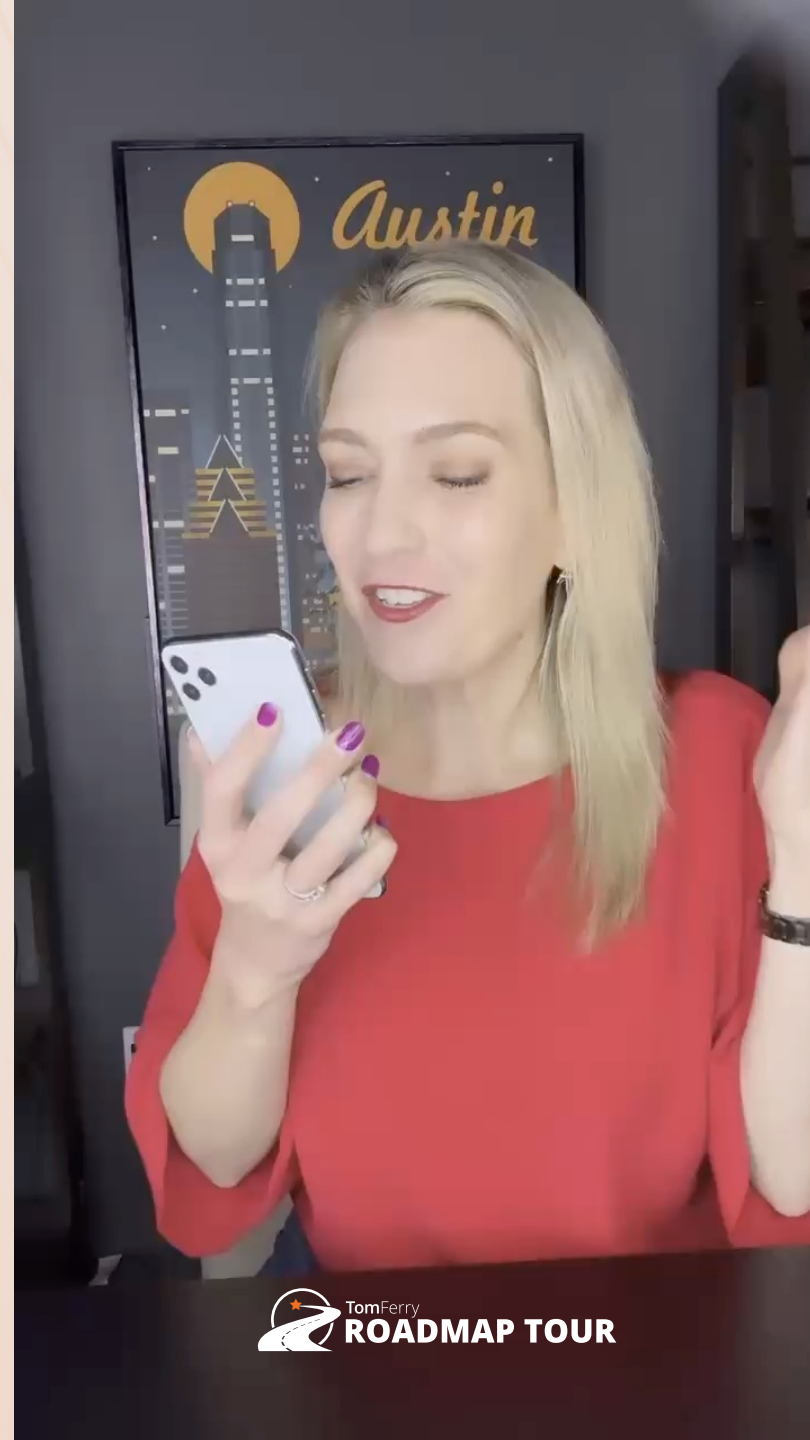


PalmAgent

Real Estate's #1 Closing Cost App



Albuquerque Roadmap



@the.mangin.team



Meaningful, valuable, personal conversations



Lead to discussions of the next move



Leads to listing appointments



Generates listings

Past Clients / Sphere – (neglected)

1. (Name) It's Tom Ferry at (ABC Realty), I helped you guys with your home purchase on (address) in (year)... It's been forever...
2. Do you guys still live at (address)?
3. I thought about you the other day... did you guys ever (something you remember they wanted to do)?
4. So, there's been a LOT of national data shared about the real estate market, when was the last time you had a local look at home prices?

Past Clients / Sphere – (last 2/3 years)

1. (Name) its (Tom Ferry) at (my company name)... How are you?
2. I'm sure you've been inundated with market stats and national news telling you real estate home vales are tanking...
3. I'm calling to find out if you have any questions about OUR market, Your neighborhood values and YOUR homes value?
4. I'm curious, do you have any plans to remodel, any home improvements and of so, do you need a recommendations on great home service providers?
5. I've noticed more buyer demand and interest in your neighborhood ... I'm curious... have you heard... ANY rumors... of a neighbor thinking about making a move?
6. Would it be okay, if I checked in periodically, to see if you've heard, any rumors, of potential opportunities for home shoppers in your neighborhood?

Past Clients / Sphere – Pro's Only

1. (Name) I'd be the WORST REALTOR on the planet if I didn't ask... have you had ANY thoughts of selling?
 - a. Really?
2. Do you know.. Anyone.. Whose had thoughts of selling?
 - a. You don't know anyone??? (long pause)
3. I'm curious, do you know anyone who tried to sell and it didn't work out?



What Happens If I Don't?

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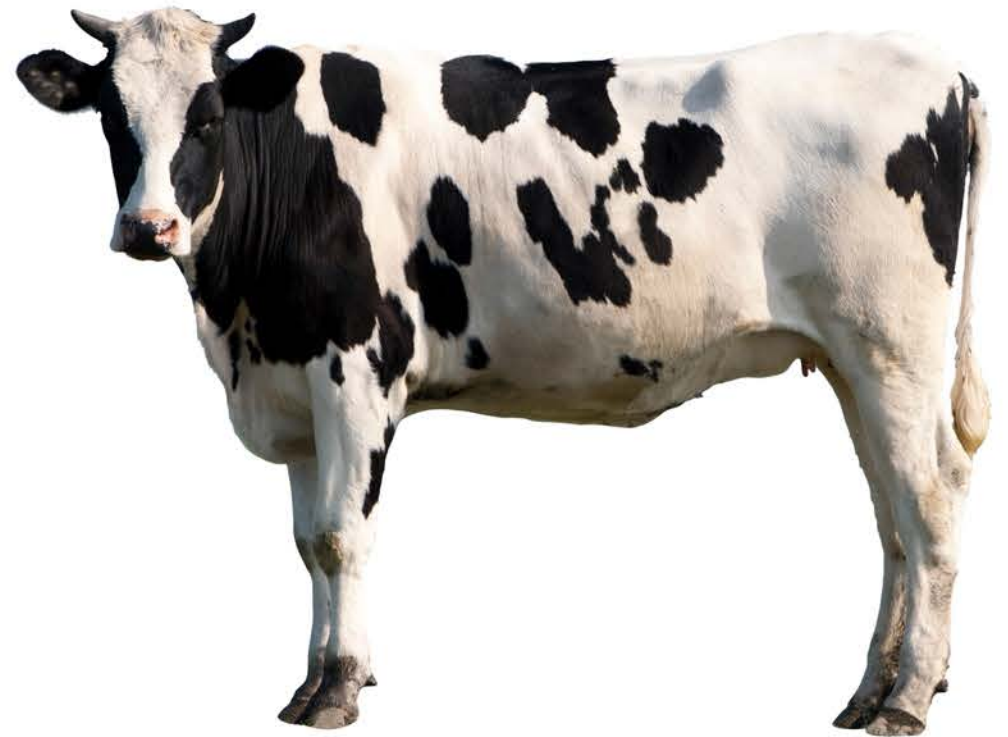


Follow Up Boss



Break

What's the difference between a **BISON** vs a **COW**?





Why does the Bison Charge the Storm?

[#chargethestorm](#)





Emily TERRELL

📍 **SAN ANTONIO, TX**

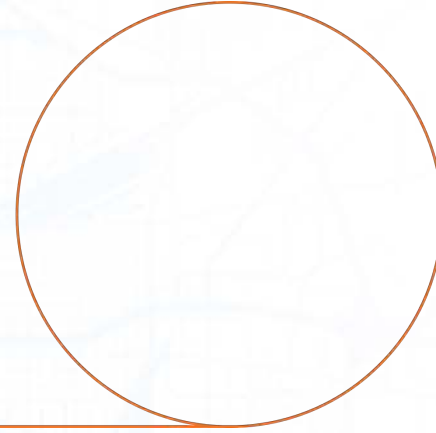
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Who has Noticed the Sales Cycle Getting Longer?

Why Most Agents Fail to Earn What They Deserve?

UNDER 30 DAYS

8%

MONTHS 2-3

27%

MONTHS 4-6

33%

MONTHS 7-12

22%

12 + MONTHS

10%

Most quit
here ↑

BoomTown!

It's not the Leads, it's the Follow Up

Lead "Batting Averages" on Closed - By Assigned Agent; At least 15 total closed or missed transactions

Assigned Agent	Leads	Closed	% of Leads Closed	Missed	% Share of Closed to
John [REDACTED]	235	6	2.6%	17	26%
Christine [REDACTED]	261	6	2.3%	25	19%
Alex [REDACTED]	2090	9	0.4%	184	5%
Jennifer [REDACTED]	332	9	2.7%	27	25%
Jake [REDACTED]	141	9	6.4%	12	43%
Kayla [REDACTED]	153	4	2.6%	11	27%
Kristina [REDACTED]	209	8	3.8%	25	24%
Lindsay [REDACTED]	188	7	3.7%	23	23%
Matt [REDACTED]	242	7	2.9%	27	21%
Cal [REDACTED]	252	7	2.8%	33	18%
Shannon [REDACTED]	270	13	4.8%	26	33%
Joan [REDACTED]	76	6	7.9%	10	38%
Total	4416	91	2.1%	419	18%



**So, What am I
Really Saying?**



I need a schedule that causes conversion

8:15am - 9pm

9am - 11am

11am - 12pm

12pm - 1pm

1pm - 3pm

3pm - 6pm

6pm - 9pm

Prior 24hr follow up

Have conversations, set appts (new + follow up)

Training or staff meeting

Working lunch (simple follow-up / text / emails)

Personal time / errands / attend closings

Appts / afternoon follow up/prospecting

Quiet time @home / correspondence

Stop Following Up, “Checking In” & Chasing

I bet you're a lot like me... and you work from a calendar... OR... “the fact that we're both busy people...”

Since you guys want to start the process in (time frame)

Buyer: Let's pencil in a time to touch base, get caught up on the market, interest rates, recent sales in (1/2 the time frame) so (month), beginning or end better for you? Beginning of the week or end? Morning? Afternoon? Okay... lets do (exact time) cell or zoom? Great I'll email you a calendar invite... (pause). Sent. (name) if ANYTHING comes up... would you just text me?

Stop Following Up, “Checking In” & Chasing

I bet you're a lot like me... and you work from a calendar... OR... “the fact that we're both busy people...”

Since you guys want to start the process in (time frame)

Seller: Let's pencil in a time to start the pre-selling strategy session... (1/2 the time frame) so... (month), beginning or end better for you? Beginning of the week or end? Morning? Afternoon? Okay... let's do (exact time) cell or zoom? Great I'll email you a calendar invite... (pause). Sent. (name) if ANYTHING comes up... just text me... in the mean time... don't do anything to home until our strategy session okay?



STOP!

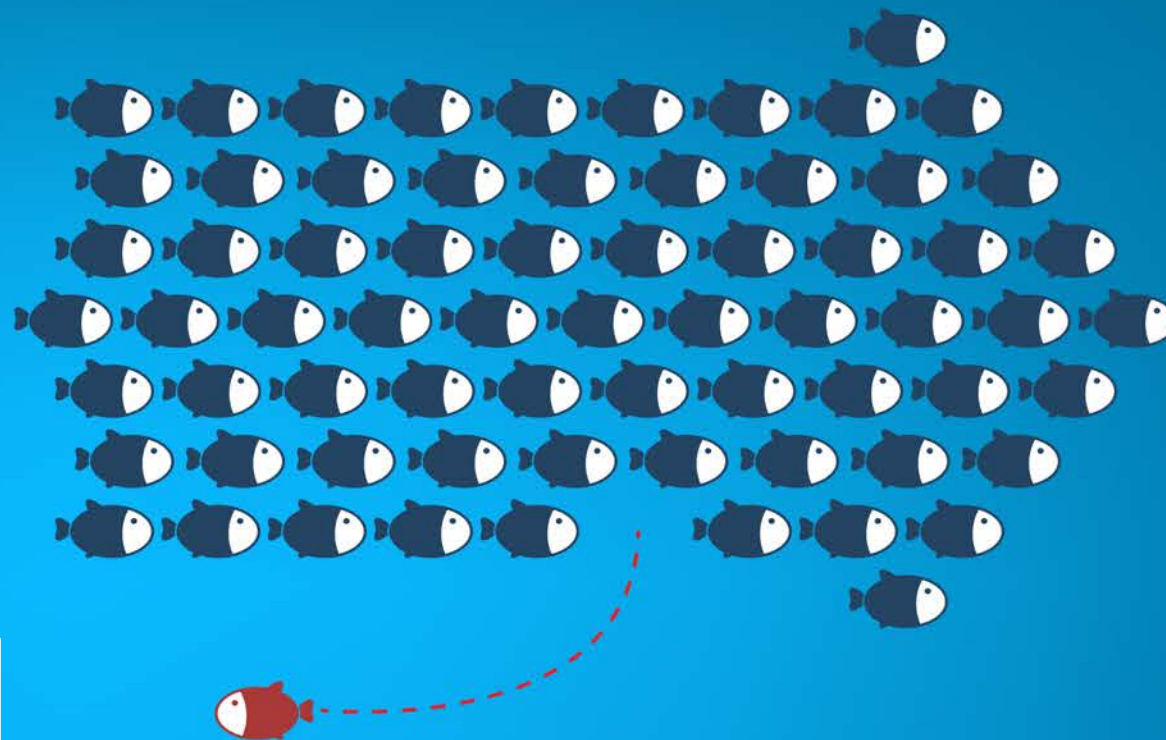
What are you thinking?

All **Great Businesses** have Six things in common...

1. A Growth Mindset!
2. A Great Brand!
3. A Great Product! (Listings/Service)
4. Great Marketing!
5. Great People!
6. A Great Operating System!

Business, at its purest is,

**Attention &
Monetization**



How are you
Differentiating Yourself?



Lost in "the sea of sameness?"



“Those without a
BRAND, compete
on **PRICE**.”

MY BRAND IS

01 My face, it's me

02 My words, my stories

03 My tone, how it makes people feel

04 My reviews/reputation/track record

05 My distribution – where & how often

06 The body of my work – in all mediums

07 It's what my clients say about you (W.O.M.A.N)

1

**What are my
Unique Factors?**

2

**What am I
passionate about?**



What medium am I known for?

**PHIL
GERDES**

SOCIAL

**MATT
CURTIS**

BILLBOARDS

**SHANNON
GILLETTE**

TELEVISION

**MAUREEN
FOLAN**

MAILERS

**KRIS
WEAVER**

RADIO ADS

**KEN
POZEK**

VIDEO



3

**Can you use another
Brand to Build Yours?**



Vincent **KESSEL**

📍 **JUPITER/PALM BEACH AREA, FL**

👜 **COMPASS**

👍 **KESSELLUXELIFESTYLES**

2022

Invested: **\$38,089.44**

RDC Volume: **\$11,217,188**

RDC GCI: **\$281,104**

2023

Invested: **\$49,043.36**

RDC Volume: **\$22,210,000**

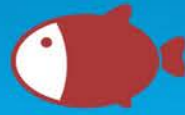
RDC GCI: **\$572,600**



 realtor.com®



**What are you
thinking?**



How else can I
Differentiate Myself?

A man with a beard and a shaved head is lying on his side on a dark couch, smiling at the camera. He is shirtless and wearing dark shorts. The background is a lush, tropical jungle scene with various plants and a large, stylized text overlay that reads "Not Your Daddy's Realtor".

Not Your Daddy's Realtor

Todd Pivetti | DRE 02133855
Residential, income, and more

THE
Shelhamer
REAL ESTATE GROUP
01950995





What are you thinking?



What am I
committed to
regarding my
Brand?

Lunch



They all ask:

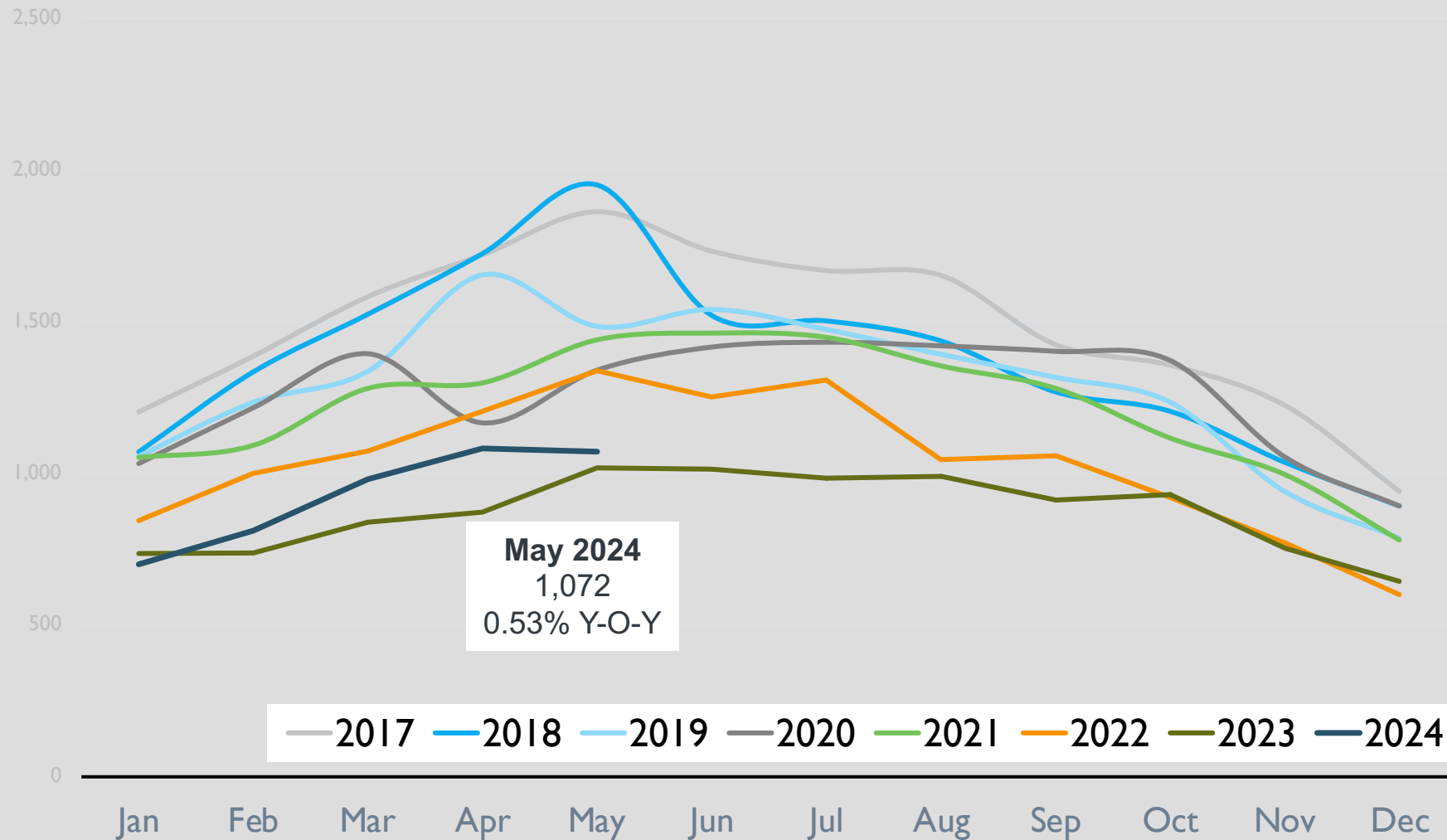
**How's the
real estate
market?**



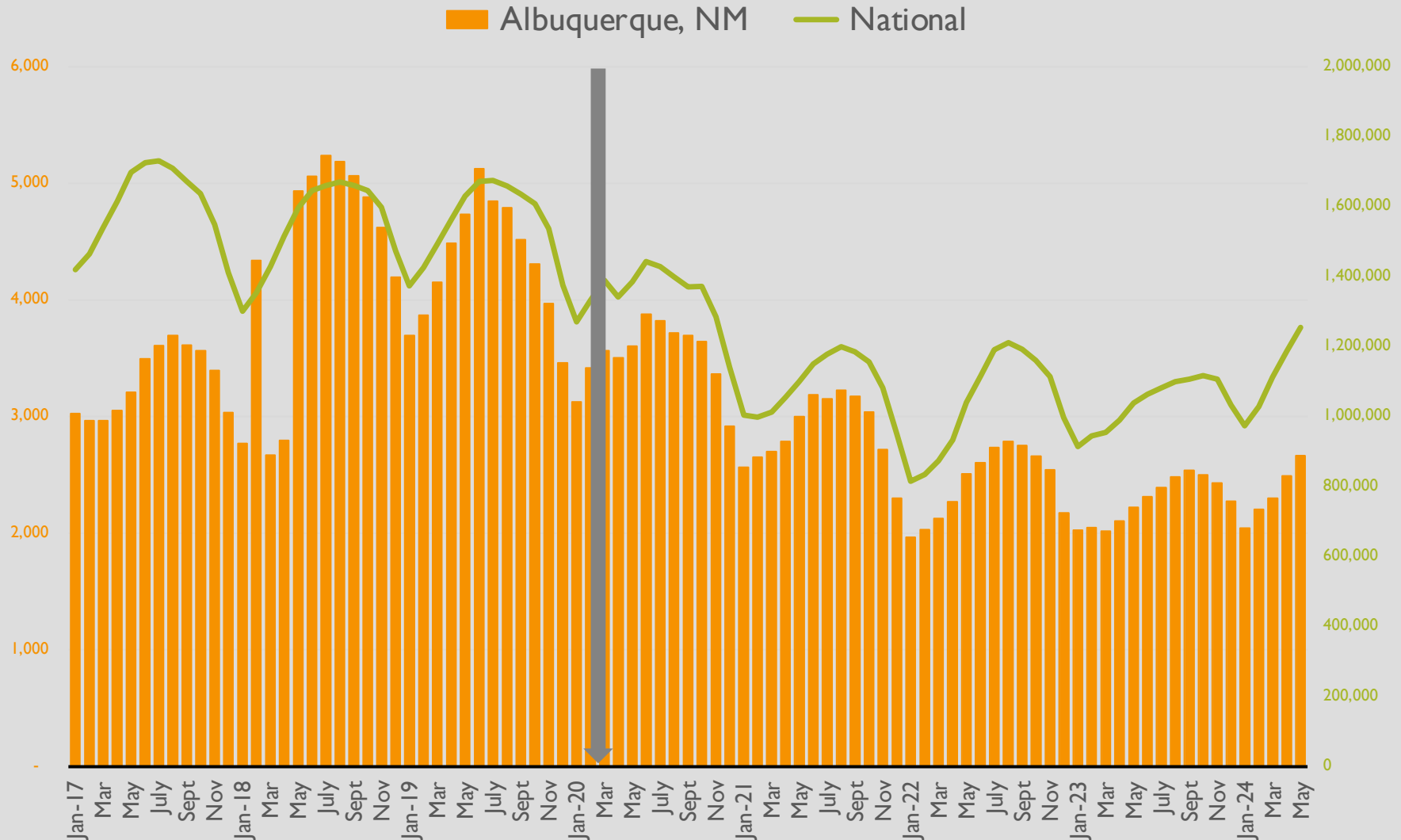
Albuquerque, NM

New Listings Compared To Previous Years

Monthly Counts in Thousands, Albuquerque, NM

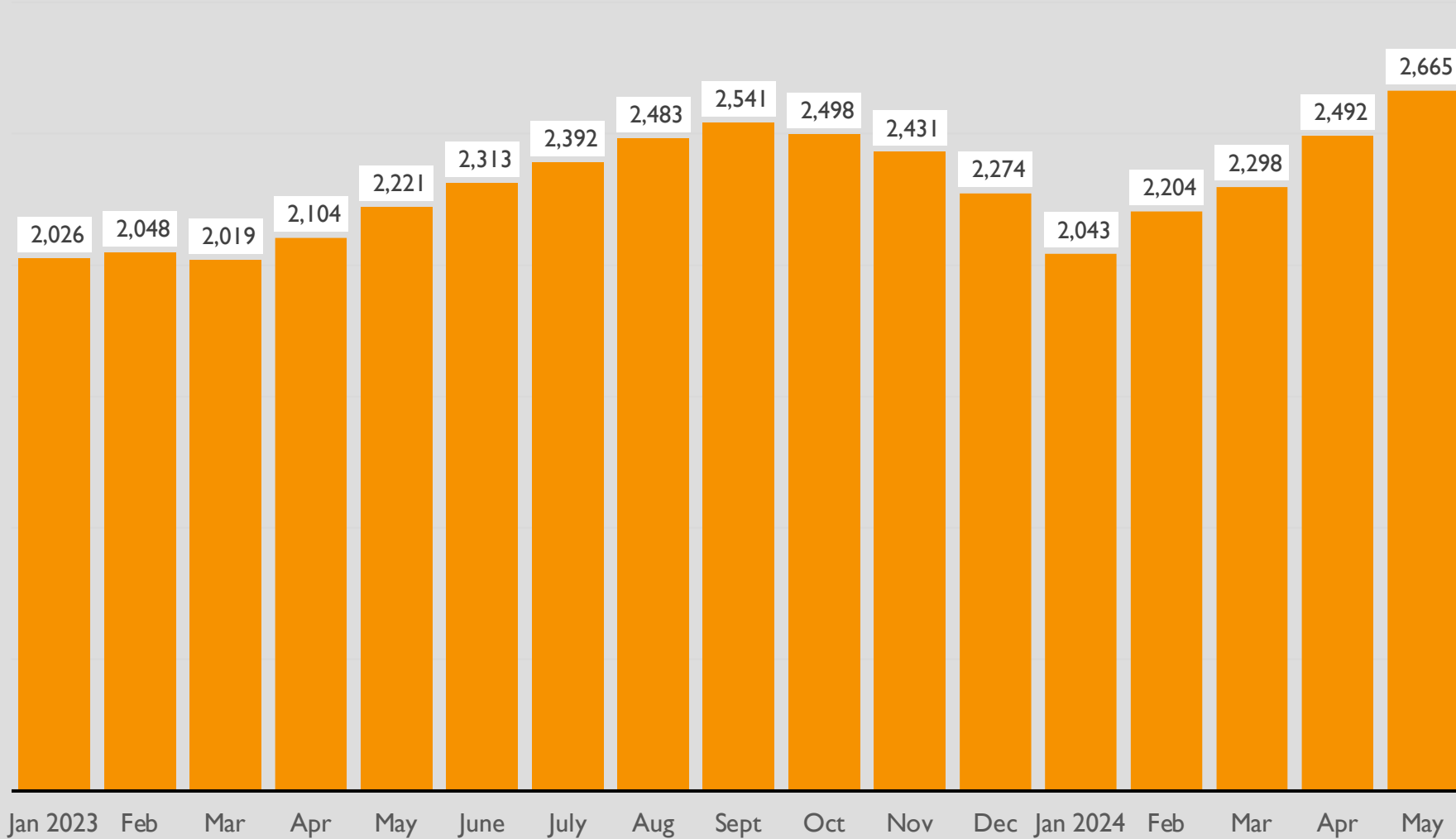


Total Listing Count



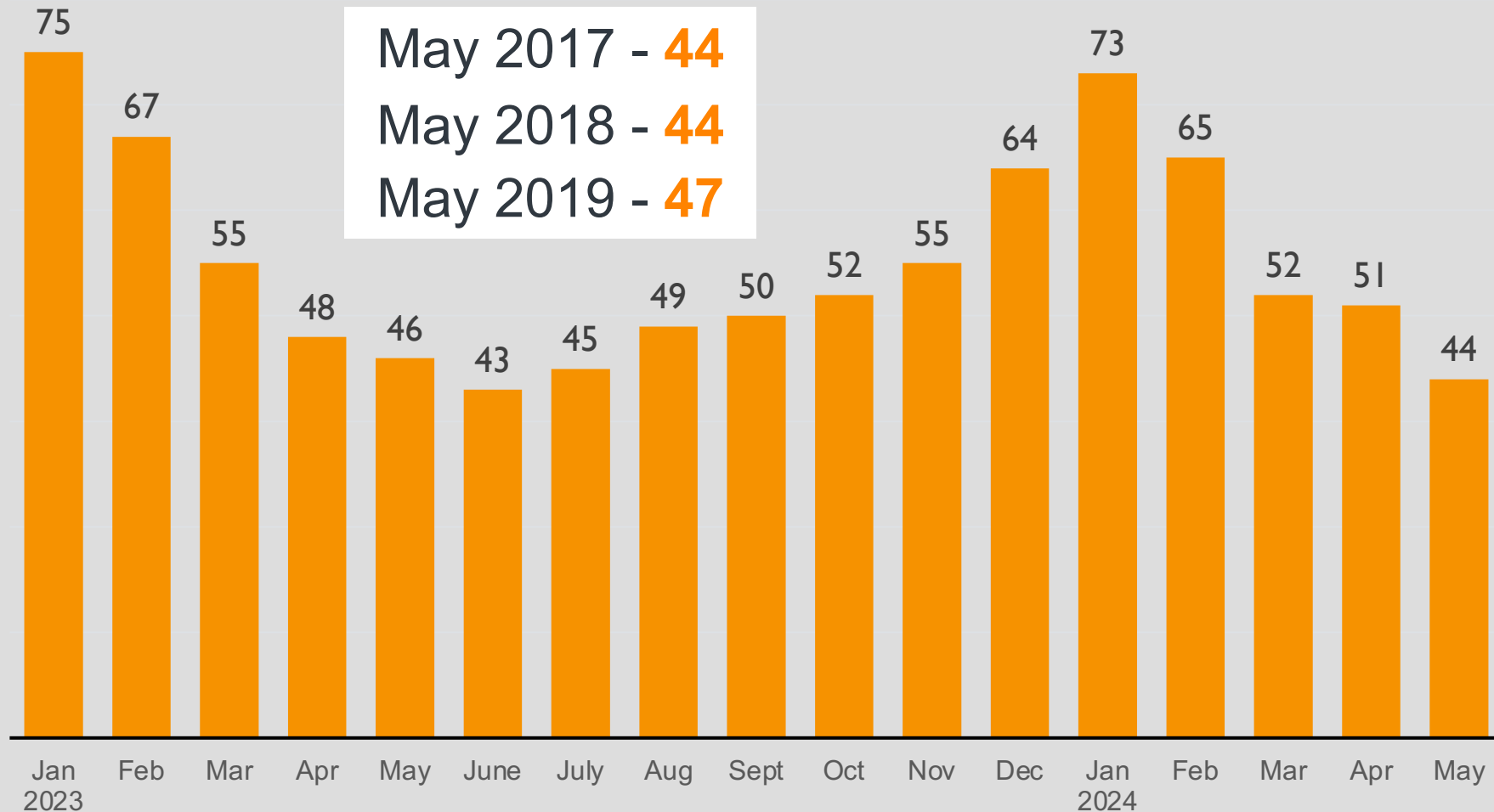
Albuquerque, NM: Total Listing Count

Since Jan 2023



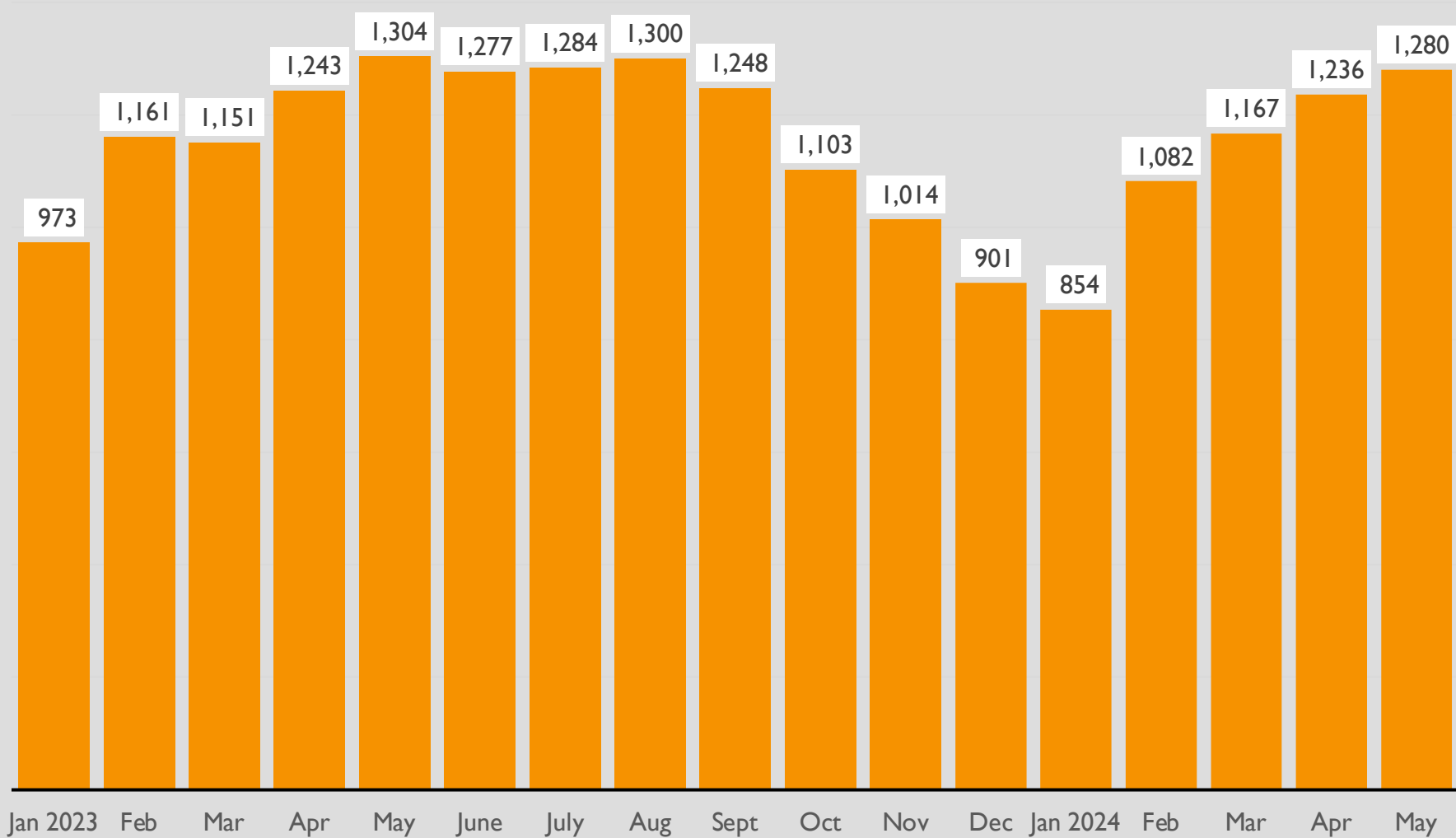
Median Days On The Market Since 2023

Albuquerque, NM



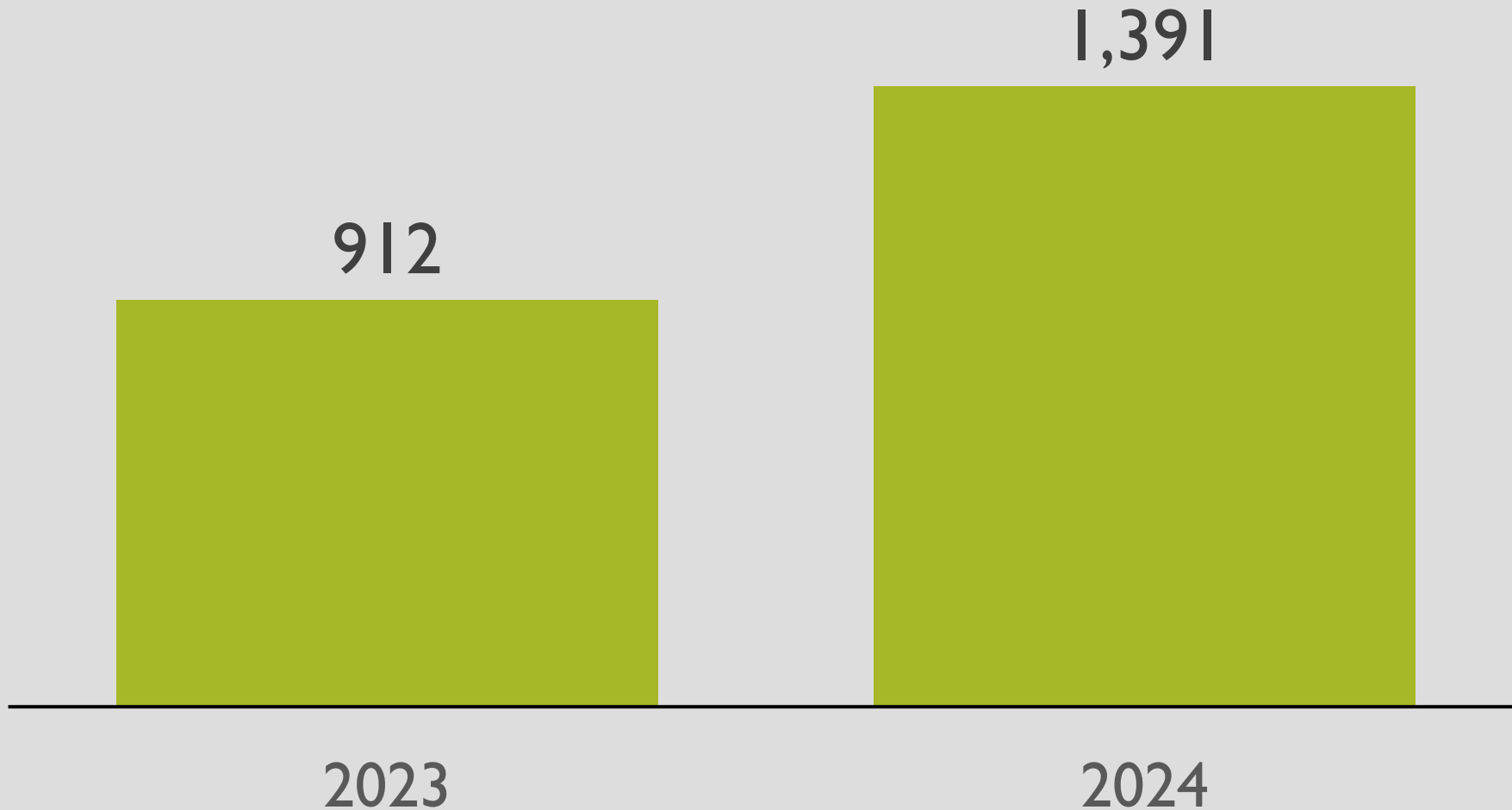
Pending Listing Count Since 2023

Albuquerque, NM



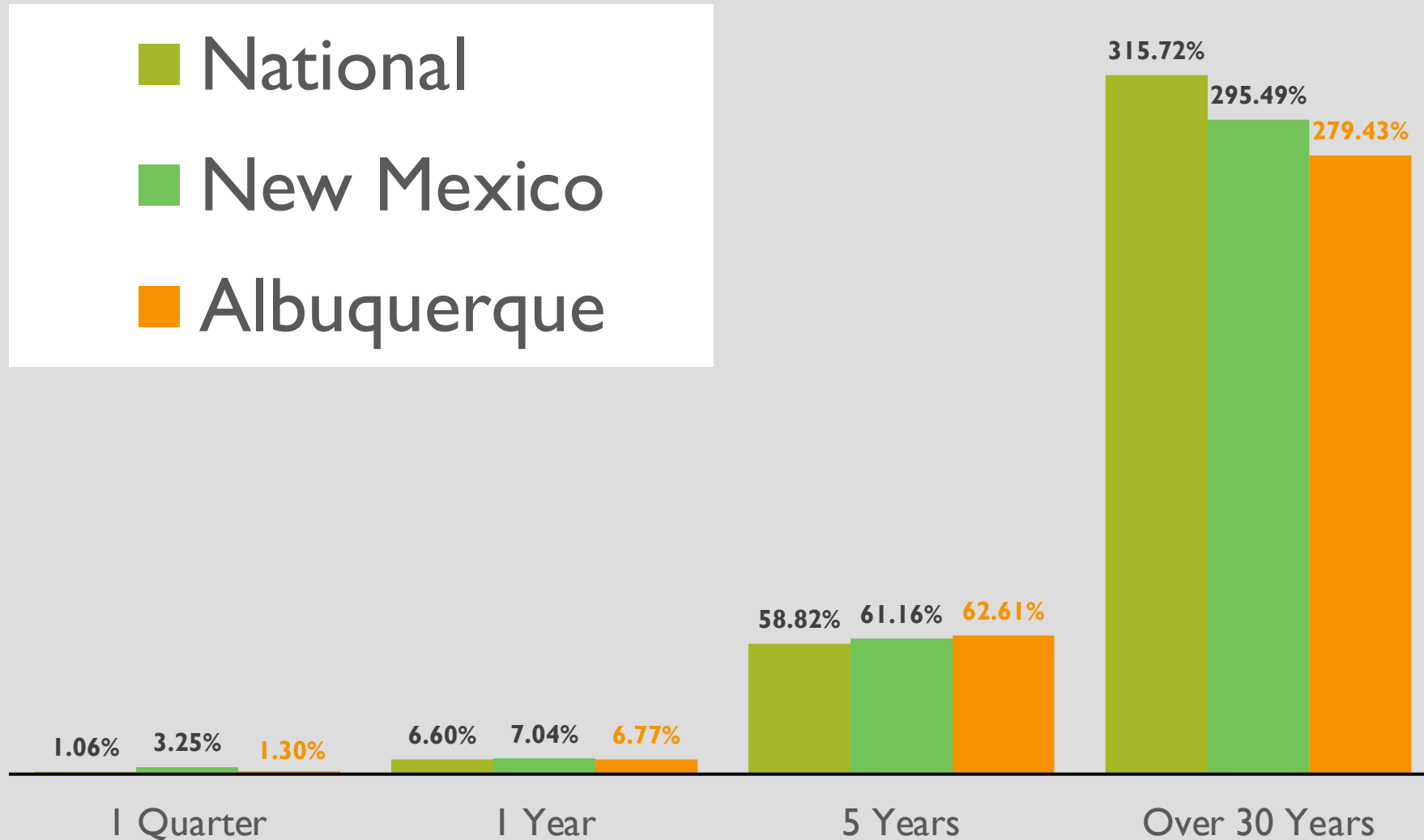
Active Listings: Last Year vs. This Year

Monthly Counts in Thousands, May, Albuquerque, NM



House Prices

Q1 2024



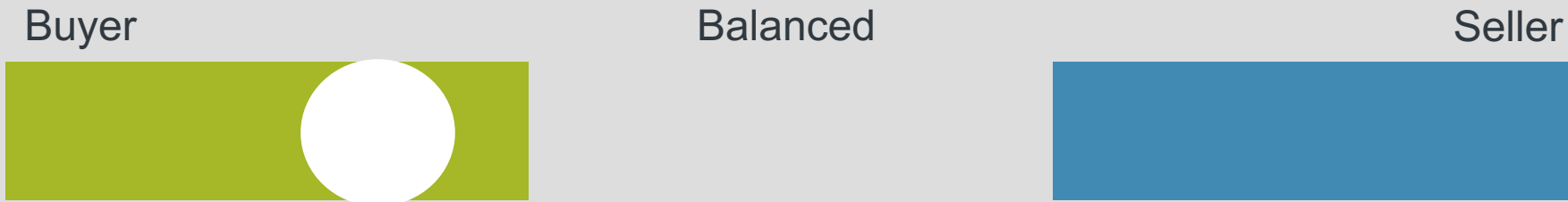


Albuquerque, NM Housing Market

In April 2024, the median listing home price in Albuquerque, NM was \$379K, trending up 1.1% year-over-year. The median listing home price per square foot was \$211. The median home sold price was \$340.1K.

Sale-to-List Price Ratio: 100.11%

Homes in Albuquerque, NM sold for **approximately the asking price** on average in April 2024.



Albuquerque, NM is a **buyer's market** in April 2024, which means that the supply of homes is greater than the demand for homes.



Jimmy **MACKIN**

CURAYTOR




The **biggest risk** is **NOT** taking any risk. In a world that's changing quickly, the only strategy that's **guaranteed to fail** is **NOT** taking risks.

(Mark Zuckerberg)



Agents' Roles are Changing

“Smart agents & teams will begin educating & marketing their **“PROCESSES”** that emphasize how to make buying **“easier”, “more convenient”, less stressful”, “protecting their interests”, even “safer”... FIRST!**

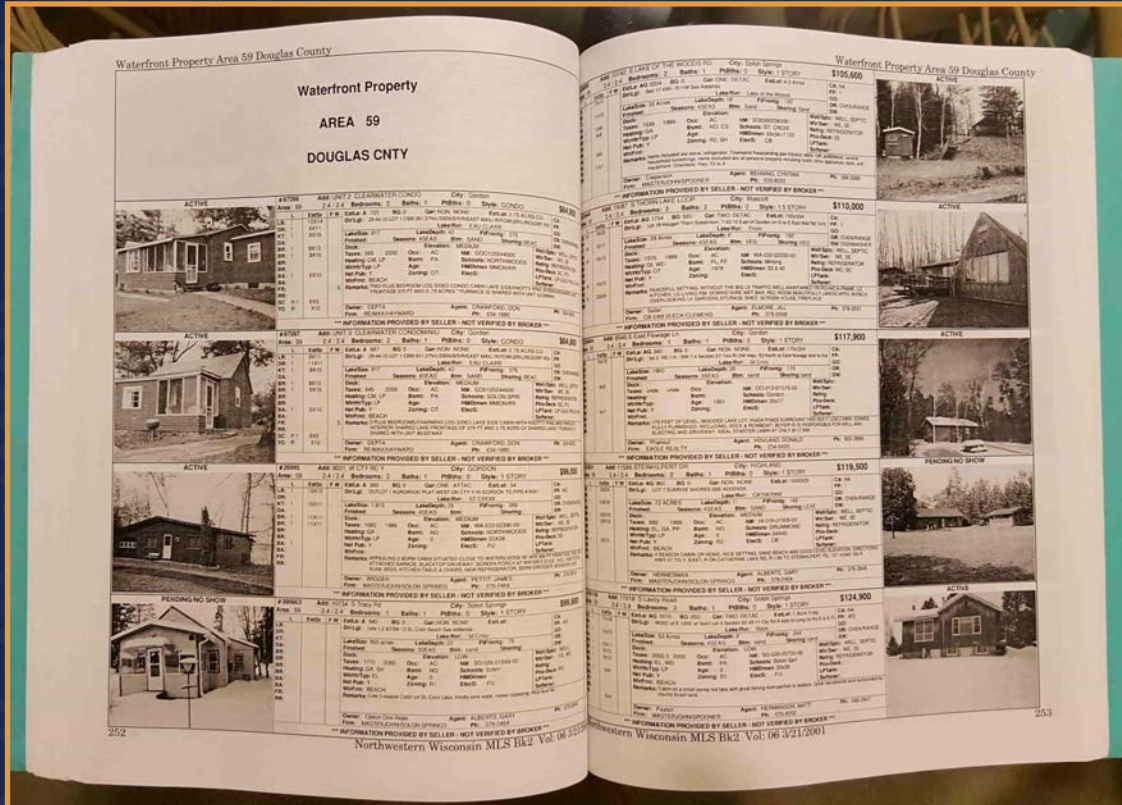
A black and white portrait of Tom Ferry, a man with a beard and glasses, resting his chin on his hand in a thoughtful pose. He is wearing a dark sweater and a ring on his finger.

**“The only thing
that’s constant
is change”**

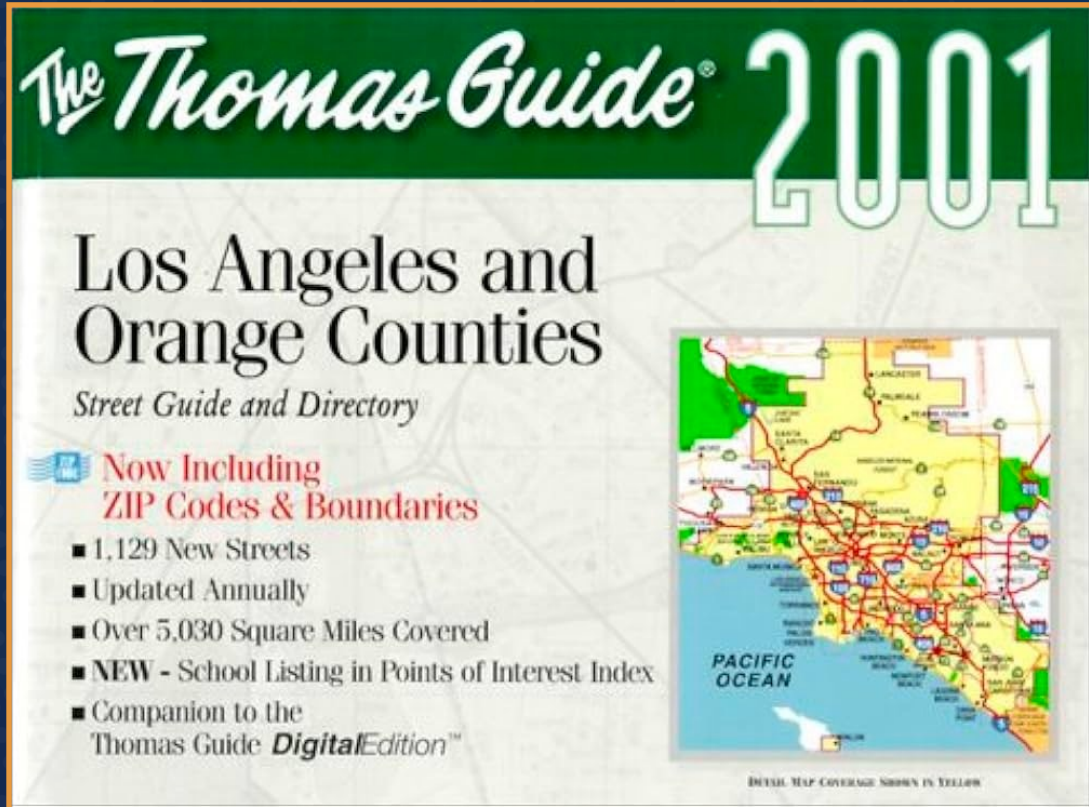
Tom

PREDECESSOR

SUCCESSOR



PREDECESSOR



SUCCESSOR




PREDECESSOR



SUCCESSOR





What did you do during
the pandemic?





**It's now a prerequisite:
Agents & Teams must Know,
Show & Demonstrate Their
Value to Earn a Fee**



**It's now a prerequisite:
Agents & Teams must Know,
Show & Demonstrate Their
Value to Earn a Fee**

It's simply time to adjust
our **processes, contracts**
and our **language?** 🙄

What are others doing




Signed April=108 | April=62




KEN POZEK

On his YouTube channel, through community events, and working with thousands of real estate clients, Ken's passion for community building in Orlando is evident in all he does. As the team leader of the Ken Pozek Group, Ken and his team are striving to be the go-to resource for all things Orlando. So whether you're looking to buy or sell a home in Greater Orlando, or you're just looking to stay in the know, Ken and his team are here to help!



"He's like if Walt Disney's Grandson sold real estate"
-Subscriber




HOME SELL BUY TEAM COM


- Attention to Detail - We understand the market and can guide you help you find your new home.
- We Build Relationships - A good portion of our transactions come

Meet the Team

Admin Staff



Lisa Chinatti
Broker Owner



Jason Posnick
Director of Sales

Above Market Average




**Want to know
HOW?**

Dialogues for existing buyers

“(name) we’ve been working together for the last (x weeks/months) would you say I’m living up to the promise we talked about in our initial consultation?

Great, I’ve enjoyed working with you to. The next logical step would be to formalize our partnership with a buyer broker agreement, can I explain? 😊

An aerial view of a large whale swimming in the ocean. A small kayak with a person inside is visible in the lower center of the frame, providing a sense of scale. The water is a deep blue with some whitecaps.

If you make it
a “big deal”...
then it is!

Just ASK! 😊




New Buyers

Dialogues – New Buyers

1. Tell me about what you'd like to do? (explore motivation)
2. What's your sense of timing?
3. Have you seen some homes online you like? What's your dream home?
4. (look at homes or start sending them homes via text)
5. Lets talk financing...

Dialogues – New Buyers

6. Here's my company/team... and how we work together to ensure a smooth, successful transaction.
7. The next step is to formalize working together, we typically start with a (non Exclusive)
8. Our professional fee is (x)...
9. How the fee gets paid... 3 options...

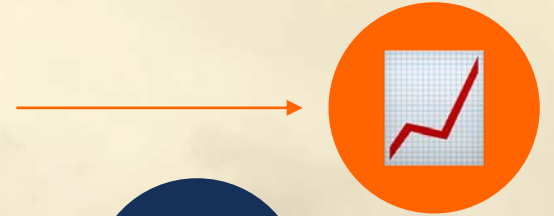
An aerial view of a large whale swimming in the ocean. A small kayak with a person inside is visible in the lower center of the frame, providing a sense of scale. The water is a deep blue with some whitecaps.

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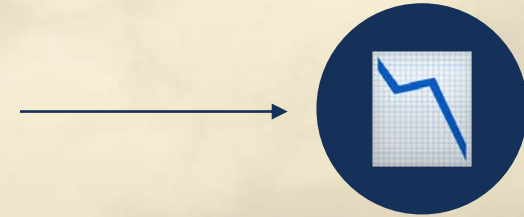
Just ASK! 😊

Choose your hard

1. Bite the bullet – start now.



2. Wait, panic, then start.



**How much do I
Prepare for a Listing
Appointment?**

Know, **Show** & Demonstrate!

There's been a lot of talk about what agents do when representing buyers in their home purchase... I take my business... and helping you succeed... very seriously. So, I took the time.. to list out the first of 90 ways.. I help my clients identify, negotiate and ultimately successfully close on their new home... can I share?"

90 Ways We Serve You

Courtesy of The Svelling Group

BRAND & LAMINATE



90 Ways We Serve you

1. Schedule Time to Meet for a Strategy Session
2. Prepare Guide & Educational Presentation
3. Meet and Discuss Goals and Non-Negotiables
4. Explain Agency Relationships
5. Discuss Different Types of Financing Options
6. Help Find a Mortgage Lender
7. Obtain Pre-Approval Letter from Lender
8. Provide Resources to Research crime in neighborhoods, school ratings, etc.
9. Provide Overview of Current Market Conditions
10. Explain Company's Value

90 Ways We Serve you

11. Discuss Earnest Money Deposits
12. Explain Home Inspection Process
13. Educate About Local Neighborhoods
14. Discuss Foreclosures & Short Sales
15. Gather Needs & Wants of Next Home
16. Explain School Districts Effect on Home Values
17. Explain Recording Devices During Showings
18. Learn All Goals & Make A Plan
19. Create Internal File for Records
20. Send Homes Within Their Criteria

90 Ways We Serve you

- 21. Start Showing Homes as Requested
- 22. Schedule & Organize All Showings
- 23. Gather Showing Instructions for Each Listing
- 24. Send Showing Schedule
- 25. Show Up Early and Prepare First Showing
- 26. Look for Possible Repair Issues While Showing
- 27. Gather Feedback After Each Showing
- 28. Update When New Homes Hit the Market
- 29. Share Knowledge & Insight About Homes
- 30. Guide Through Emotional Journey

90 Ways We Serve you

- 31. Listen & Learn at Each Showing
- 32. Keep Records of All Showings
- 33. Update Listing Agents with Feedback
- 34. Discuss Homeowner's Associations
- 35. Estimate Expected Utility Usage Costs
- 36. Confirm Water Source and Status
- 37. Discuss Transferable Warranties
- 38. Explain Property Appraisal Process
- 39. Discuss Multiple Offer Situations
- 40. Create Practice Offer to Help Prepare

90 Ways We Serve you

- 41. Provide Updated Housing Market Data
- 42. Inform Showing Activity Weekly
- 43. Update on Any Price Drops
- 44. Discuss MLS Data at Showings
- 45. Find the Right Home
- 46. Determine Property Inclusions & Exclusions
- 47. Prepare Sales Contract When Ready
- 48. Educate on Sales Contract Options
- 49. Determine Need for Lead-Based Paint Disclosure
- 50. Explain Home Warranty Options

90 Ways We Serve you

- 51. Update Pre-Approval Letter with Each New Offer
- 52. Discuss Loan Objection Deadlines
- 53. Choose a Closing Date
- 54. Verify Listing Data Is Correct
- 55. Review Comps to Determine Value
- 56. Prepare & Submit Offer to Listing Agent
- 57. Negotiate Offer with Listing Agent
- 58. Execute A Sales Contract & Disclosures
- 59. Once Under Contract, Send to Escrow Company
- 60. Coordinate Earnest Money Wire Transfer

90 Ways We Serve you

- 61. Deliver Copies to Mortgage Lender
- 62. Obtain Copy of Sellers Disclosures
- 63. Deliver Copies of Contract/Addendum
- 64. Obtain A Copy of HOA Bylaws
- 65. Keep Track of Copies for Office File
- 66. Coordinate Inspections
- 67. Meet Home Inspector at The Property
- 68. Review Home Inspection
- 69. Negotiate Inspection Objections
- 70. Get All Agreed Upon Repair Items in Writing

90 Ways We Serve you

- 71. Verify any Existing Lease Agreements
- 72. Check in With Lender To Verify Loan Status
- 73. Check on the Appraisal Date
- 74. Negotiate Any Unsatisfactory Appraisals
- 75. Coordinate Closing Times & Location
- 76. Make Sure All Documents Are Fully Signed
- 77. Verify Escrow Company Has Everything Needed
- 78. Reminder to Schedule Utilities Transfer
- 79. Make Sure All Parties Are Notified of Closing Time
- 80. Solve Any Title Problems Before Closing

90 Ways We Serve you

- 81. Receive and Review Closing Documents
- 82. Review Closing Figures
- 83. Confirm Repairs Have Been Made by Sellers
- 84. Perform Final Walk-Through
- 85. Resolve Any Last-Minute Issues
- 86. Get CDA Signed by Brokerage
- 87. Attend Closing
- 88. Provide Home Warranty Paperwork
- 89. Facilitate Transfer of Keys and Accessories
- 90. Close Out File

**What else could
you add to stack the
cool or create D.O.S?**

How do I answer the question

“What else? Or Why hire me vs another agent?”

- Testimonials/reviews from clients
- Your sales track record (case studies)
- Your access to “pocket listings”
- Your ability to attract listings, where there are no homes for sale
- Examples of your ability to negotiate
- Your agent-to-agent relationships (examples)

Know, **Show** & Demonstrate!

“Are you familiar with the 24 different terms that I’ll be negotiating on your behalf?
Let’s take a minute and review...”

24 Terms Negotiation

- Purchase Price
- Earnest Money Deposit
- NHD Report Fees
- City Transfer Tax
- County Transfer Tax
- Private Transfer Tax
- HOA Transfer Fees
- HOA Prep Fees
- Pest Inspection Report
- Home Inspection Report
- Other Inspection Reports (ie. Roof, Sewer/Septic, Rodent, Defensible Space)
- Seller Rent Back
- Home Warranty
- Inspection Contingency
- Appraisal Contingency
- Home Repairs
- Pest Clearance
- Loan Contingency
- Days until Close of Escrow
- Appliances
- Government Requirements
- Notice to Perform
- Liquidated Damages
- Arbitration of Disputes

**What stories will be
shared here?**

Know, **Show** & Demonstrate!

“I’d love to APPLY for the job of being your REALTOR®...”

What questions do you have about what we do, how we get paid?”

Know, Show & Demonstrate!

Let's talk about the various ways I could get paid for my services...

I do everything I shared here... and for this I charge (x)% of the purchase price of the home...

The options for my fee's are...

1. The home seller has already set aside through a seller concession, my fee.
2. The seller set aside... less than the fee I charge... and its up to me to negotiate...
3. The home seller set aside.. no fee for the buyer agent... and we have to decide how I get paid for the services I provide...

What questions do you have about these three scenarios?

How will I improve upon all of this?



If you're the **cheapest**:
... people don't expect you to be the ***BEST***.

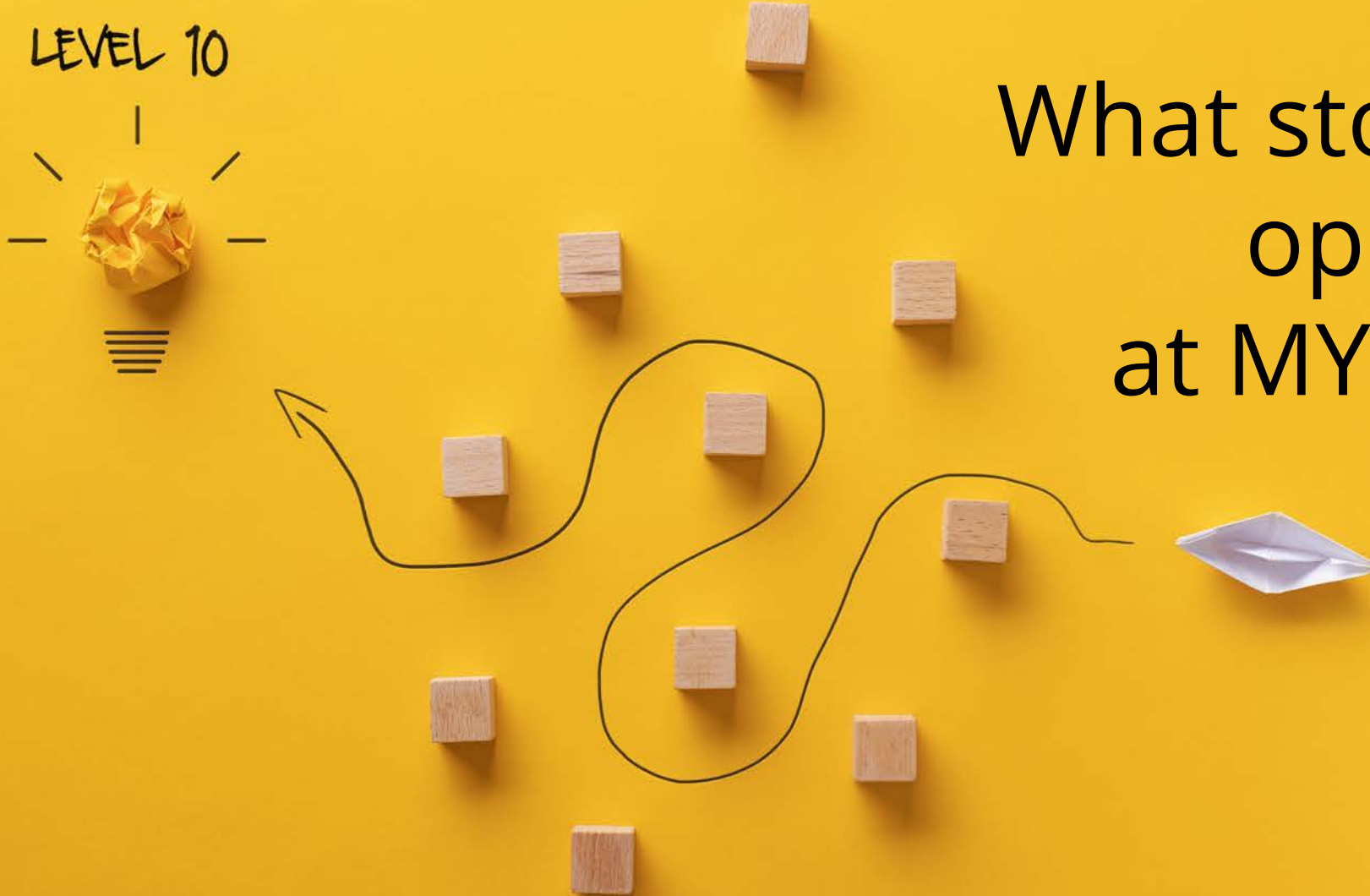
If you're the **best**:
... people don't expect you to be the ***CHEAPEST***.



Why Don't I Really Play Full Out?



What stops me from
operating
at MY LEVEL 10?



The Addiction to...

OPINIONS OF OTHERS



The Addiction to...

DRAMA



The Addiction to...

THE PAST

The Addiction to...

WORRY

What would my
business look
like, playing at
Level 10?



Break

All-New Seller Concession Calculator In Palm Agent



9:41

Concession Cheat Sheet

Home Price **\$500,000**

Loan Type **Conventional**

Property Type **Primary**

Down Payment **20%**

Current Concessions

Buyer Seller Calculators Premium



Listing Price \$500,000				
Loan Type	Property Type	Contribution Type	Down Payment	MAX Seller Contribution
Conventional	Primary & Secondary Home	Closing Costs, Prepaid items, & Discount Points	Less than 10%	\$15,000 3%
			10-25%	\$30,000 6%
			More Than 25%	\$45,000 9%
Conventional	Investment	Closing Costs, Prepaid items, & Discount Points	15% or more	\$10,000 2%
FHA	Primary	Closing Costs, Prepaid items, & Discount Points	3.5% or more	\$30,000 6%
VA	Primary	Closing costs, prepaids, and up to 2 discount points Funding fee, additional discount points, and debt payoff	N/A	Unlimited
				\$20,000 4%
USDA*	Primary	Closing Costs, Prepaid items, & Discount Points	N/A	\$30,000 6%

*All numbers are estimates only. Please obtain final number prior to closing.



Lori Spence
Spence Realty

(312) 413-8247
lori@spencerealty.com
www.spencerealty.com

TREC#: 653311
NMLS#: 52-0021
Corporate DRE#: 475631
License#: 321171

2331 Magnolia Drive
Los Angeles, CA 90021



Title fees and rates provided by
HOUSE TITLE



PalmAgent

Real Estate's #1 Closing Cost App

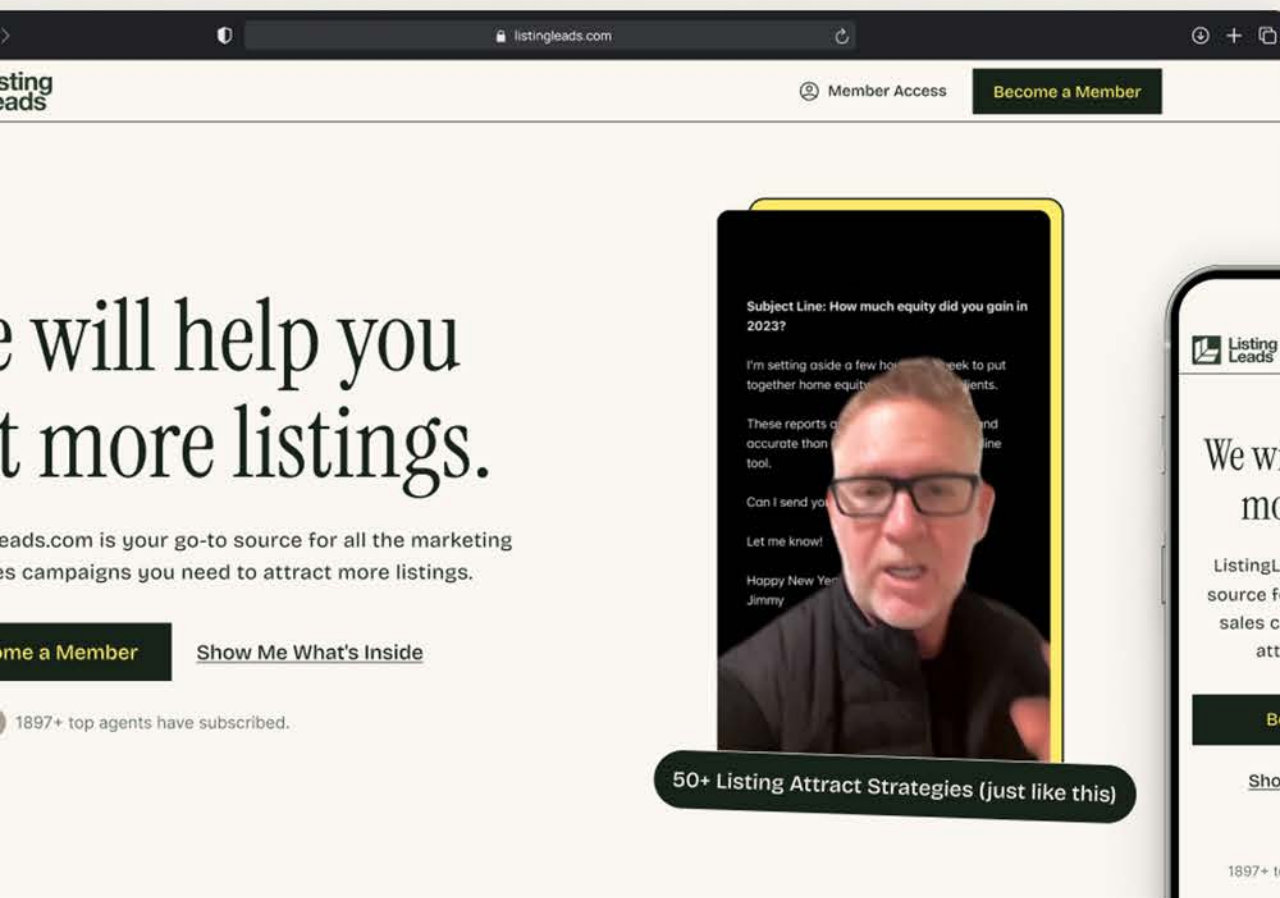


Albuquerque Roadmap

Am I 100% certain,
I will win more business,
in **THIS** market?



What are you thinking?



What's included in Listing Leads

You'll get instant access to the best listing attraction

 Text Scripts

 Direct Mail Templates

 Email Campaign

 Social Shareables

with new drops every month.



**Win
More
Listings!**



**How can we install
more **structure**
to the business?**



5 Things



What are my top 3 personal goals for the next 90 days?

Relationships?

Health?

Spirit?

Savings?

Contribution?



What are your **3 most important** goals for the quarter?

Get It Up & Visual!



↑ PROFITABILITY to 35% - LIST 500 PROPERTIES - ADD 48 AGENTS

SALES	OPERATIONS	MARKETING	RECRUITING	FINANCE / LISTINGS
<ul style="list-style-type: none"> • 400 units, 170M volume, • ↑ conversion by 5% 	<ul style="list-style-type: none"> • Scale for 10 new agents/month • Streamline training platform • Operationalize conversion 	<ul style="list-style-type: none"> • 2 transactions for every listing • 1% conversion of database • 50 closed deals from social media 	<ul style="list-style-type: none"> • + 4 agents per month • + 24 legacy agents • 4 recruiting events 	
Conversion Tracking System Trainual - Lessons Trainual - Video Support Lead Rotation Management Mentor Training Establish Tiers Visual for bullpen Tracking System Hire ISA Train ISA	Trainual - Onboarding Trainual - New Agent Training Trainual - Exp Agent Training Trainual - All JMO Processes KPI Tracking System Campaigns for Zip Codes Cognito Sold.com Google Voice Last Pass ISA System (c) Action Plan - Buyer Under Contract Action Plan - Seller Under Contract Agent Checklist / Task Reminders Circle Dial Google Reviews	Action Plans Seller Nurture Expireds New Construction Lease 1-year Lease 2-year FSBO Recruiting Emails (24) Buyer Presentation YouTube Ads Google PPC VIDEO Listing Campaign Favorite Room Professional attire Listing presentation Listing coordinator Photographer Marketing Staging Negotiations De-Staging a house/cha Support Team Showing Smart Setting seller expectations St. Joseph Open House What good commercial Language Super vs. Local Buy Other: Seller - Listings Live Seller - Under Contract Buyer - Buyer guarantee Buyer - Looking at homes Buyer - Closing table Website Goods SE SW NE NW Recruiting Campaign Tools to Secure Lead Source Training (Dial) Metrics Listing collateral Community Pages Coca Lee Grand Lakes Rhythm Bridgewater Cane Island Old Mary Cocoa SW Cocoa Creek	— calls per day — interviews per week Q1 event	SISU → CTE Tracking System Referrals Legacy Pod Leaders 2023 Budget List to close process refinement supra/sign pick-up client on live email Slack until closing Caption vault Listing Coordinator Hire

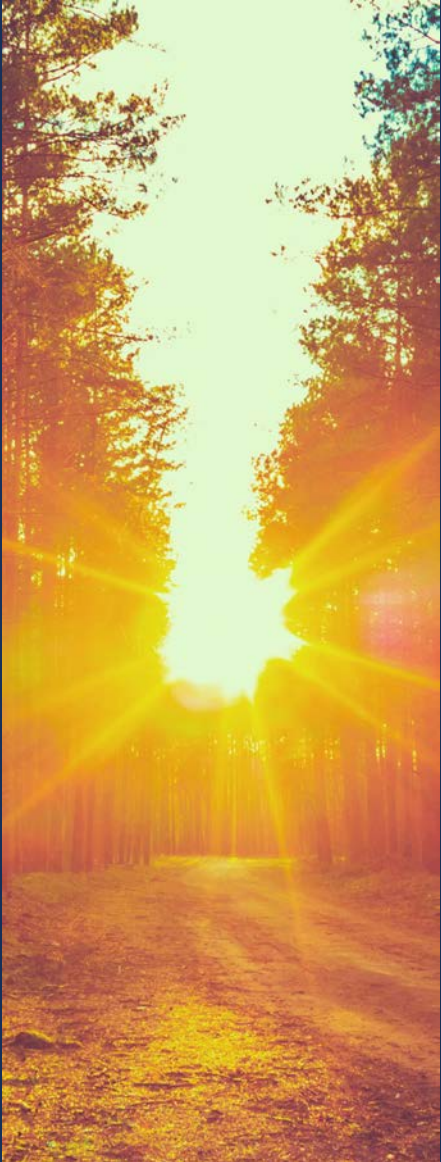


Jamie McMartin

“Remember, if it’s not
in my schedule,
it doesn’t get done!”

Tom





Reimagine My Schedule

- 1. A morning routine that fires you up!** – *(capture on social)*
 - Exercise
 - Mindset – Gratitudes, Prayer, Learning, Check-ins
- 2. Office at the same time (Discipline)!** – *(capture on social)*
- 3. Business morning routine**
 - Daily hot sheets – *(capture on social – “Did you know?”)*
 - Role play
 - 5/5/4/2
- 4. Managing your business, transactions, marketing**
– *(capture on social)*
- 5. Going on appointments**
– *(capture on social)*

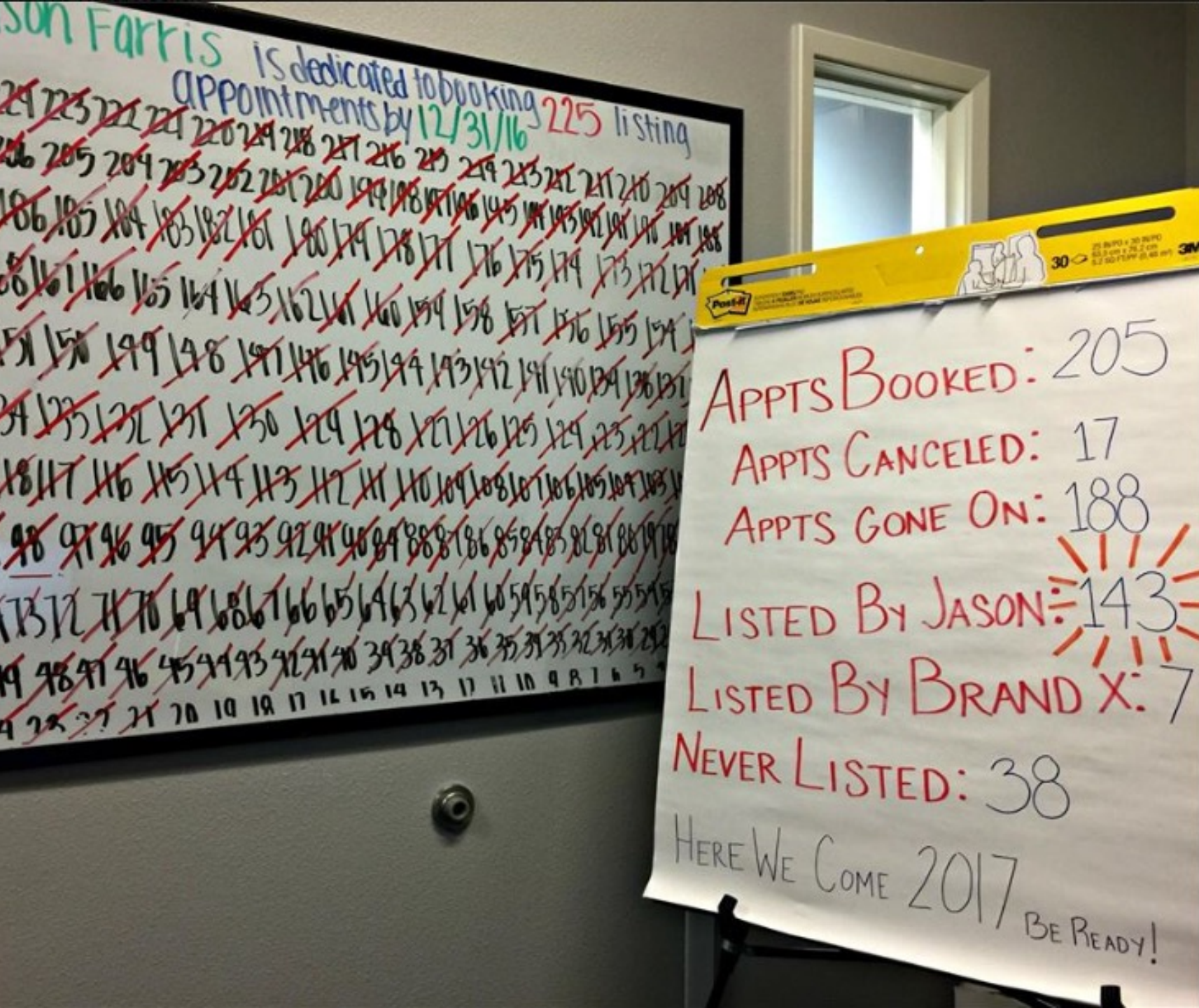


"Move it Forward" Meetings

- 1. Weekly Dashboard Review/Commitments**
- 2. Weekly Marketing Meeting**
- 3. Weekly Sales Improvement Meeting**
- 4. A Focused Weekly Coaching Session**

When we
MEASURE PERFORMANCE,

→ Performance Improves ←



Jason Farris ▶ TFYC Core+ Private Group

Follow · January 6 ·

I was asked to post my final numbers from my 2016 individual listing appointment goal board here in this group (previously posted in Elite group) - I hope it inspires you. I'm excited for the new year because now I truly know what is possible.

I am over flowing with gratitude! Big thanks to Steve, Tom and the entire TF community.

Like Comment



The 3 most **important** checklists

Daily Checklist

- ☐ Powerful morning routine
- ☐ Market intelligence (*daily hot sheets, showing time, interest rates*)
- ☐ (Team) huddle-up (*what's our outcomes for today?*)
- ☐ (Team) role play (*objection*) handling & sell like Oprah
- ☐ Hours of Power | Follow-ups (5/5/4) & post that I did it!
- ☐ Meet with my TC/assistant & review all under contracts
- ☐ Pending/Listing check-ins
- ☐ 2 social posts on all channels
- ☐ Afternoon follow-ups
- ☐ Go on (x) appointments daily

Weekly Checklist

- | | |
|------------------------------------------------------------------------------|----------------------------------------------------------------------|
| <input type="checkbox"/> Film 1 to 2 shows | <input type="checkbox"/> All seller's follow-up |
| <input type="checkbox"/> Study competition | <input type="checkbox"/> Manage / execute marketing plan |
| <input type="checkbox"/> Review my #'s (week, month, year) | <input type="checkbox"/> Book (x) appointments |
| <input type="checkbox"/> Coaching sessions | <input type="checkbox"/> List (y) homes |
| <input type="checkbox"/> Powerful skill development | <input type="checkbox"/> Sell (z) homes |
| <input type="checkbox"/> Team meeting | <input type="checkbox"/> Close (a) houses |
| <input type="checkbox"/> Review projects (<i>Do/Doing/Done</i>) | <input type="checkbox"/> Preview properties for clients |
| <input type="checkbox"/> Project "do" time (<i>working on my business</i>) | <input type="checkbox"/> Virtual / open house / mega open house prep |

Monthly Checklist

- ☐ Be the CEO, review everything in my business!
- ☐ Review plan to actuals (*with my manager/coach*)
- ☐ Budget review (*with my manager/coach*)
- ☐ Set aside ($X\%$) for taxes
- ☐ Set aside ($Y\%$) for investment
- ☐ Review next month / quarter marketing campaigns
- ☐ Review the monthly results & action plans for next!

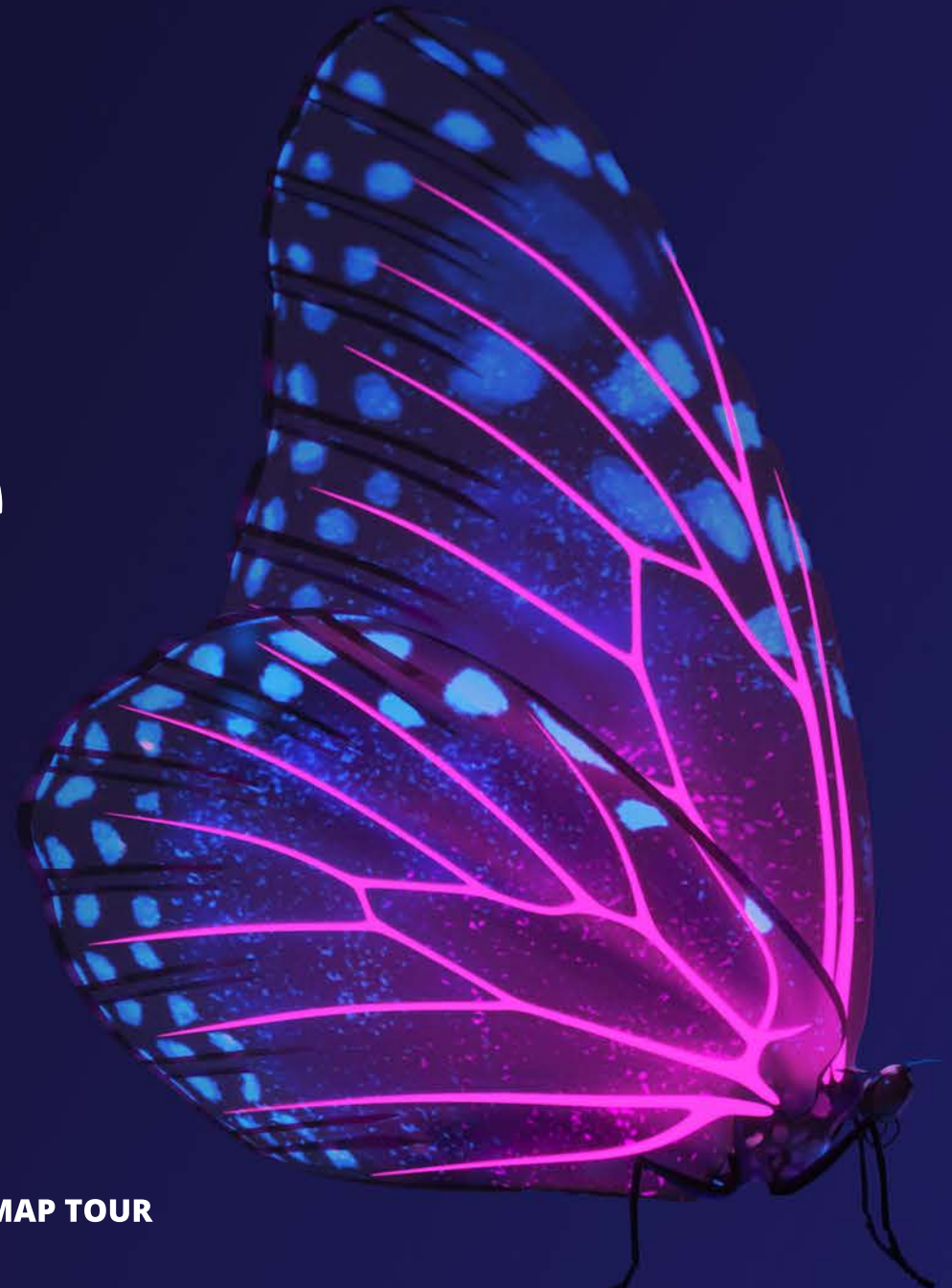
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Attention & Monetization



For things
to change

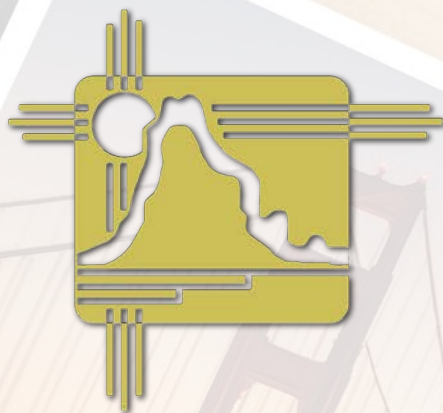
Things have to change



**What am I
Committed to?**



Fidelity
National Title
of New Mexico Inc



San Juan Title

"Where Good Deeds Get Done"

TF TomFerry™

SUCCESS SUMMIT

THE YEAR'S MOST IMPORTANT
REAL ESTATE EVENT

Aug. 27-29 | Dallas, TX



GET MY TICKET



Thank your
title partner!



thank
you