



# THE LISTING EDGE

THE LISTING EDGE

# Tag Tom on your social posts



@TomFerry



@TomFerry



@TomFerry



@TomFerry



@TomFerry



@TomFerry



@TomFerry

**@TomFerry**

**@Ferryintl**

**#FerryIntl**

**#TomFerry**



THE LISTING EDGE

Jimmy  
**MACKIN**

Jason  
**PANTANA**

David  
**CHILDERS**

Kristi  
**JENCKS**



Tom Ferry  
**ROADMAP TOUR**



**Thank our  
partners!**

# *Thank You to Our Sponsors*



**Thank your  
title partner!**

THE LISTING EDGE



CHICAGO TITLE®



**Fidelity National Title**



**Heritage  
Title Company**



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# PalmAgent

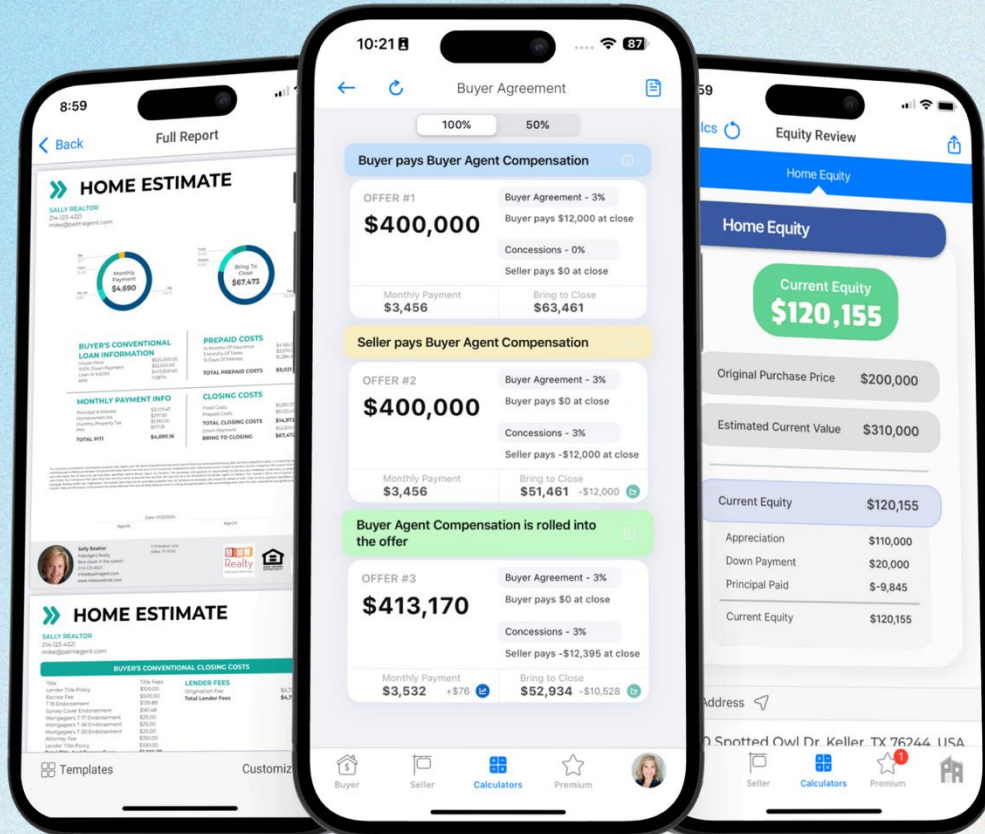
Real Estate's #1 Closing Cost

App



Seattle Roadmap

Scan to Download



ChicagoAgent  
t



TicorAgent  
t



FidelityAgent  
t



ValleyTitleApp

# **Why** Are You Here?

THE LISTING EDGE

I'm assuming **YOU** want  
to **WIN MORE!**

---

# AGENTS JOIN US FOR 10 REASONS

---

1. More Listings
2. More Referrals
3. Better Marketing
4. Improve Skills
5. Bigger Brand
6. Improve Profit
7. Scale Themselves
8. More Time
9. Community
10. More **REVENUE!**



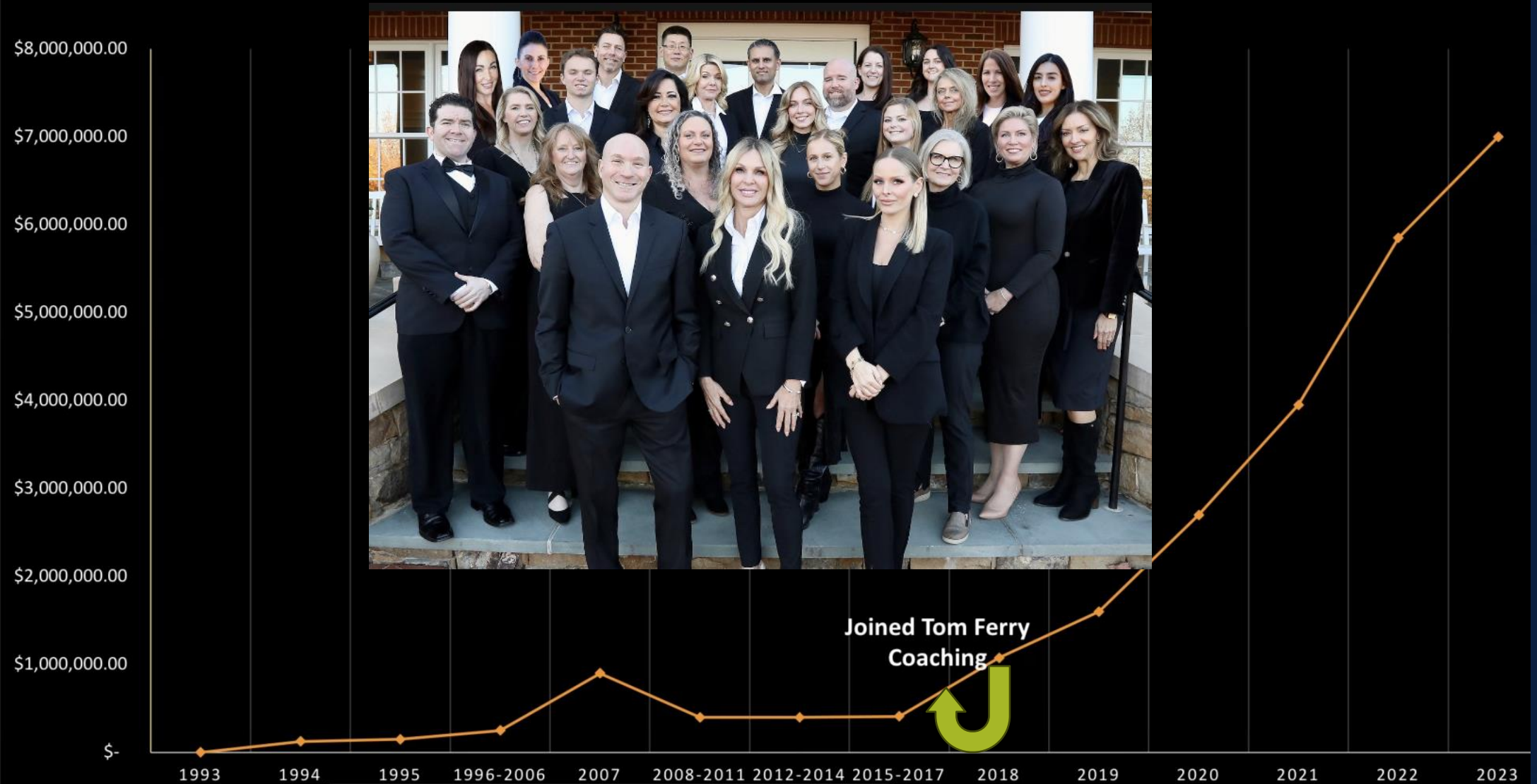
# Three types of agents today...

# Carolyn YOUNG



THE LISTING EDGE

## TOTAL GCI 1993 TO 2023



THE LISTING EDGE



# Kaleb MONROE



Houston, TX



kaleb@thekmteam.com



kalebrmonroe

Homes sold: **86**

GCI: **\$591,115**

Volume: **\$22,613,065**

THE LISTING EDGE





# Hannah DUBYNE

ELITE+ Coaching

Through coaching, Hannah implemented a video marketing strategy that now generates double-digit, high-quality leads weekly, putting her startup on track for \$50M by year three.

📍 Camas, WA

📷 @hannahdubyne

2024 Year-to-Date:

Units: 44

GCI: \$700,000

Volume: \$33,000,000

THE LISTING EDGE



**If you want to  
drive **REVENUE**...**

**1. 82/27**

**THE LISTING EDGE**

# PRIORITIZE REVENUE





**2. Win the weeks,  
others lose.**



**There's another  
challenge we  
see...**

## NAR's 179 ACTIVITIES

---

**8%**

GENERATES REVENUE



**92%**

ADMINISTRATIVE TASKS

THE LISTING EDGE



**CHECK EMAIL**  
**ORGANIZE CRM**  
**MAINTAIN CLIENT DATABASES**  
**PROOFREAD DOCUMENTS**  
**ORDER SUPPLIES**  
**UPDATE LISTING IN CRM**  
**COMPILE A FORMAL FILE ON PROPERTY**  
**INSTALL ELECTRONIC LOCK BOX**  
**PREPARE PAPERWORK**  
**PREPARE MAILING AND CONTACT LIST**  
**REVIEW CURB APPEAL ASSESSMENT**  
**FILE DOCUMENTS**  
**REVIEW INTERIOR DÉCOR ASSESSMENT**  
**MANAGE CALENDARS**  
**GENERATE MAIL-MERGE LETTERS**  
**DATA ENTRY**  
**REPRINT/SUPPLY BROCHURES AS NEEDED**  
**COORDINATE SHOWINGS**

**ORGANIZE CRM**  
**CHECK EMAIL**  
**MAINTAIN CLIENT DATABASES**  
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**MANAGE CALENDARS**  
**GENERATE MAIL-MERGE LETTERS**  
**DATA ENTRY**  
**REPRINT/SUPPLY BROCHURES AS NEEDED**  
**COORDINATE SHOWINGS**



You don't have a **time  
management** problem,  
you have a **prioritization**  
problem!

A black and white portrait of Haruki Murakami. He is looking directly at the camera with a serious expression. His hands are clasped together in front of his chest, with his fingers interlaced. The lighting is dramatic, with strong shadows on his face and hands.

**"You need to prioritize your work. Specifically, how you divide your time and energy.**

**If you don't, you will lack focus. And your whole life will be out of balance."**

**Haruki Murakami**

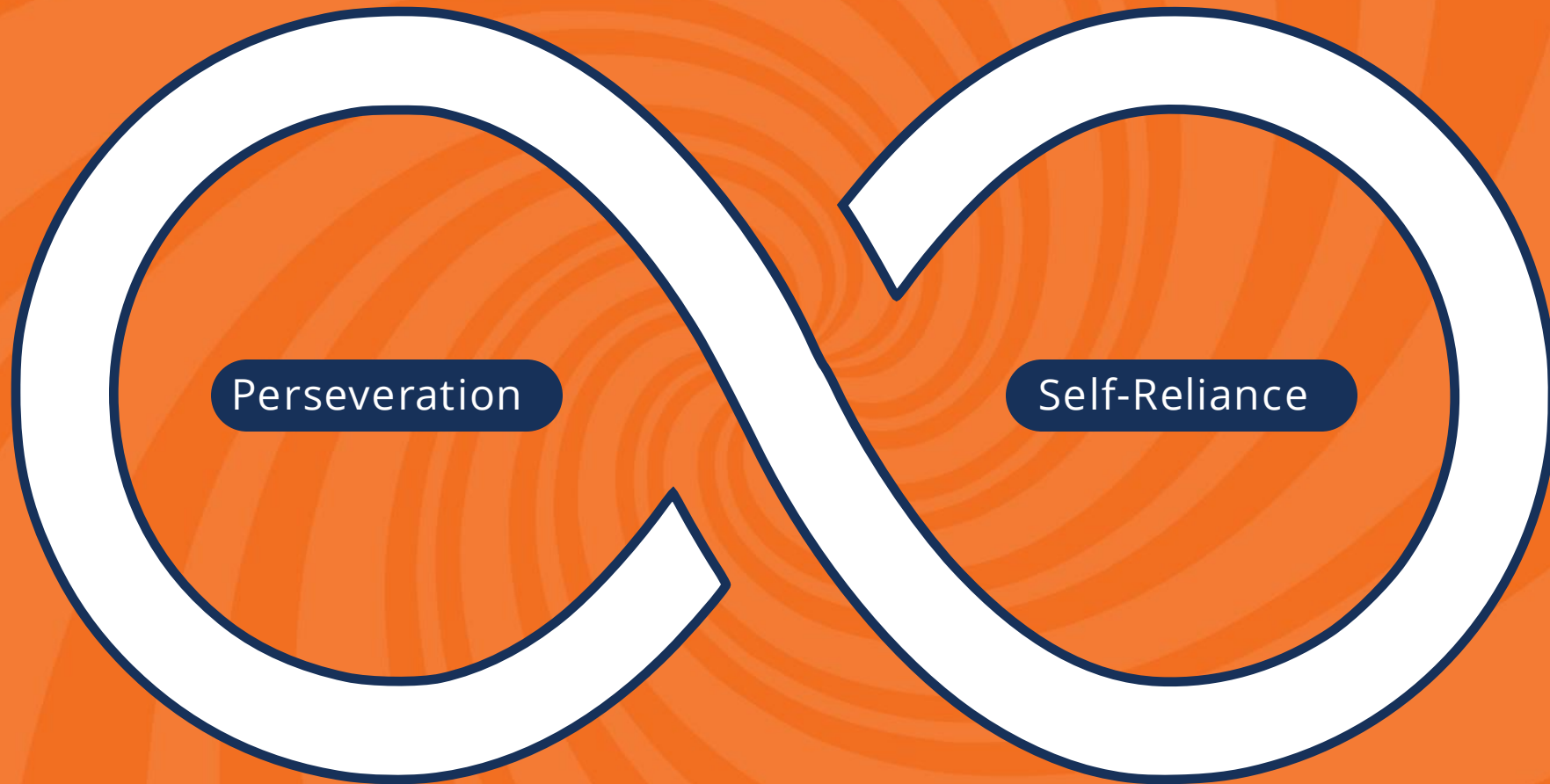


# PRIORITIZE REVENUE



# **3. Run a dickens pattern on yourself & team**

# Feeling Stuck 📍



# **4. Close the gap on the 6%**



# 6% From Life Events



Diapers



Death



Diamonds



Divorce



Diplomas



Defaults



D'Relocation



# Close The Gap on the 6%



Email Campaigns



Equity Update Email

Email Campaigns

## Equity Update Email



Subject: How much equity have you gained in 2024?

Many of my clients have been reaching out because they're considering selling in 2025.

To help, I'm setting aside time this week to prepare updated home value reports.

**Can I prepare one for your home?**




P.S. I just completed a report for a client who gained \$53,000 in the last 12 months. I think you'll be surprised by your number.

Here's the  
Problem.

## The Tom Ferry & Revaluate Database Case Study

# 8 Agents/Teams **500,000** Database Contacts...

### Missing Information

-  1. Mailing addresses: **250K**
-  2. Email addresses: **125K**
-  3. Phone numbers: **70K**



## The Tom Ferry & Revaluate Database Case Study

# What the audit revealed...

Listings sold in your database, by other agents\*...

1. LOST listings sold: **5,161**
2. LOST Listing volume: **2.57 Billion**
3. LOST Listing commissions: **\$50 - \$70M**

## The Tom Ferry & Revaluate Database Case Study

# Let's be clear

1. This is JUST **LOST** listings Sold Data.
2. This is just in the last 12 months.
3. The data shows, for every listing they earned, they lost 3 to 5

# Resources:

- 1. ReValuate** – Database score + Contacts integrity.
- 2. ListingLeads.com** – Low cost, uber effective marketing pieces to attract sellers. (**\$99m/**)
- 3. HiFello.com** – automated email/landing pages for larger databases to nurture and identify potentials sellers. (**\$299 to \$799m/**)

# Find out how much revenue is hiding in your dead-a-base

Step 1

**Audit your CRM**



Step 2

**Nurture your CRM**



**Start with a free  
database audit**

# PRIORITIZE REVENUE





# **4. We Must Close the Gap on the 6%**

**5. Marketing to  
identify the  
*“sell in 2025 list”*  
now!**

# STOP!

**What are my takeaways?  
What actions will I take?**

# PRIORITIZE REVENUE



**“What’s your biggest  
CHALLENGE today?”**



# **Business is Solving Problems**

Safe to say **YOU**  
**NEED** to take

**WAY MORE**  
**LISTINGS!**



**Who's controlling the market?**

**2,150,011 Listings**

**Sold Jan to July 2024**

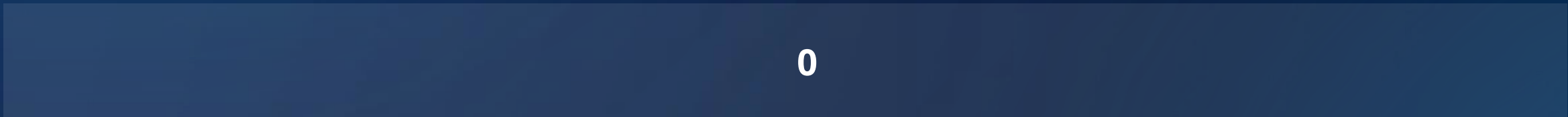
# 74%

% OF AGENTS



# 0

# OF LISTINGS **SOLD**



Data for the first 7 months of 2024

**THE LISTING EDGE**

# 14%

% OF AGENTS

215,534 Agents

# 1-4

# OF LISTINGS SOLD

591,821  
Listings **Sold**

Data for the first 7 months of 2024

**THE LISTING EDGE**



# 6%

% OF AGENTS



# 5-10

# OF LISTINGS SOLD



Data for the first 7 months of 2024

THE LISTING EDGE

# 2%

% OF AGENTS



# 11-20

# OF LISTINGS SOLD



Data for the first 7 months of 2024

THE LISTING EDGE

# .5%

% OF AGENTS



# 21-30

# OF LISTINGS SOLD



Data for the first 7 months of 2024

THE LISTING EDGE

# .17%

% OF AGENTS

2,579 Agents

# 31-44

# OF LISTINGS SOLD

**92,935 Listings Sold**



Data for the first 7 months of 2024

**THE LISTING EDGE**

# .14%

% OF AGENTS

2,134 Agents

# 45+

# OF LISTINGS SOLD

**262,295 Listings Sold**



Data for the first 7 months of 2024

**THE LISTING EDGE**

# AGENTS

# LISTINGS SOLD

1,111,200



0

215,534



2.7 per agent

591,821

91,117



6.8 per agent

618,482

30,557



14 per agent

431,232

6,255



24 per agent

153,246

2,579



36 per agent

92,935

2,134



123 per agent

262,295

Data for the first 7 months of 2024

THE LISTING EDGE



**22.7%** of agents and  
teams **control 72%**  
**of the market**

**Who wants**  
**MORE?**

What's the  
insight?

**"YOU NEED  
to Prioritize  
LISTINGS!"**

# REVENUE



solves everything



# Thank Your Title Partners!



Chicago Title



Heritage Title



Fidelity National Title







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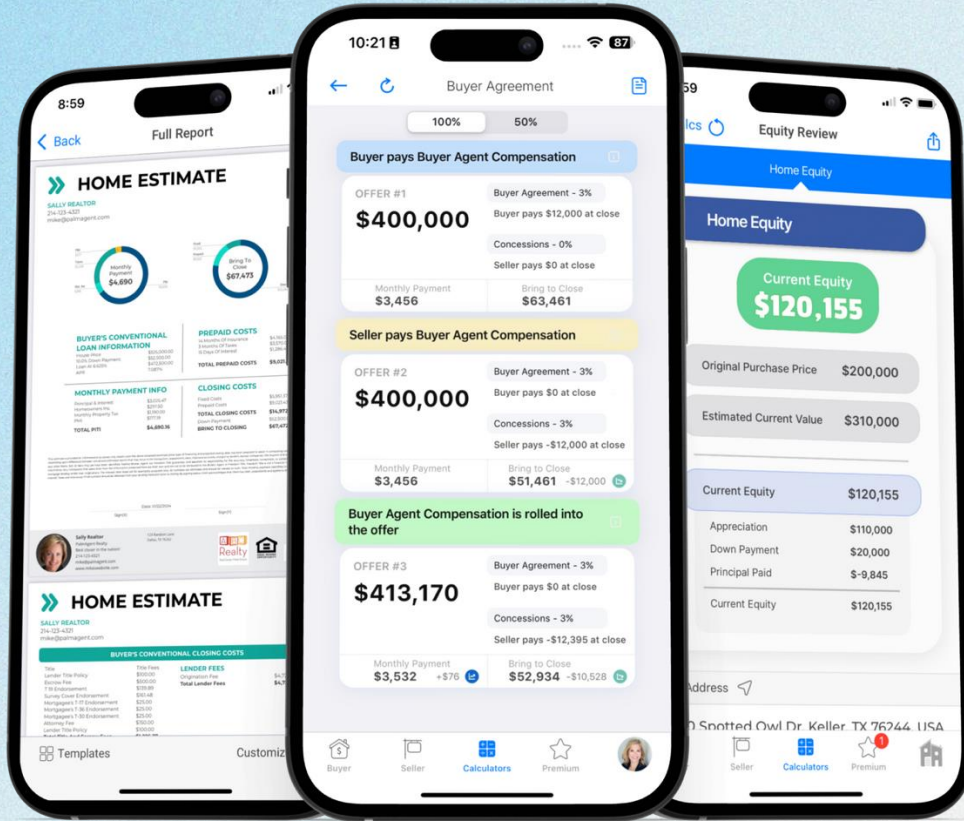
# PalmAgent

Real Estate's #1 Closing Cost



Denver Roadmap

Scan to Download



ChicagoAgent



HTCAgent



FidelityAgent

# Break

THE LISTING EDGE





# David **CHILDERS**

 **KEEPING CURRENT MATTERS**



# Jimmy **MACKIN**





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

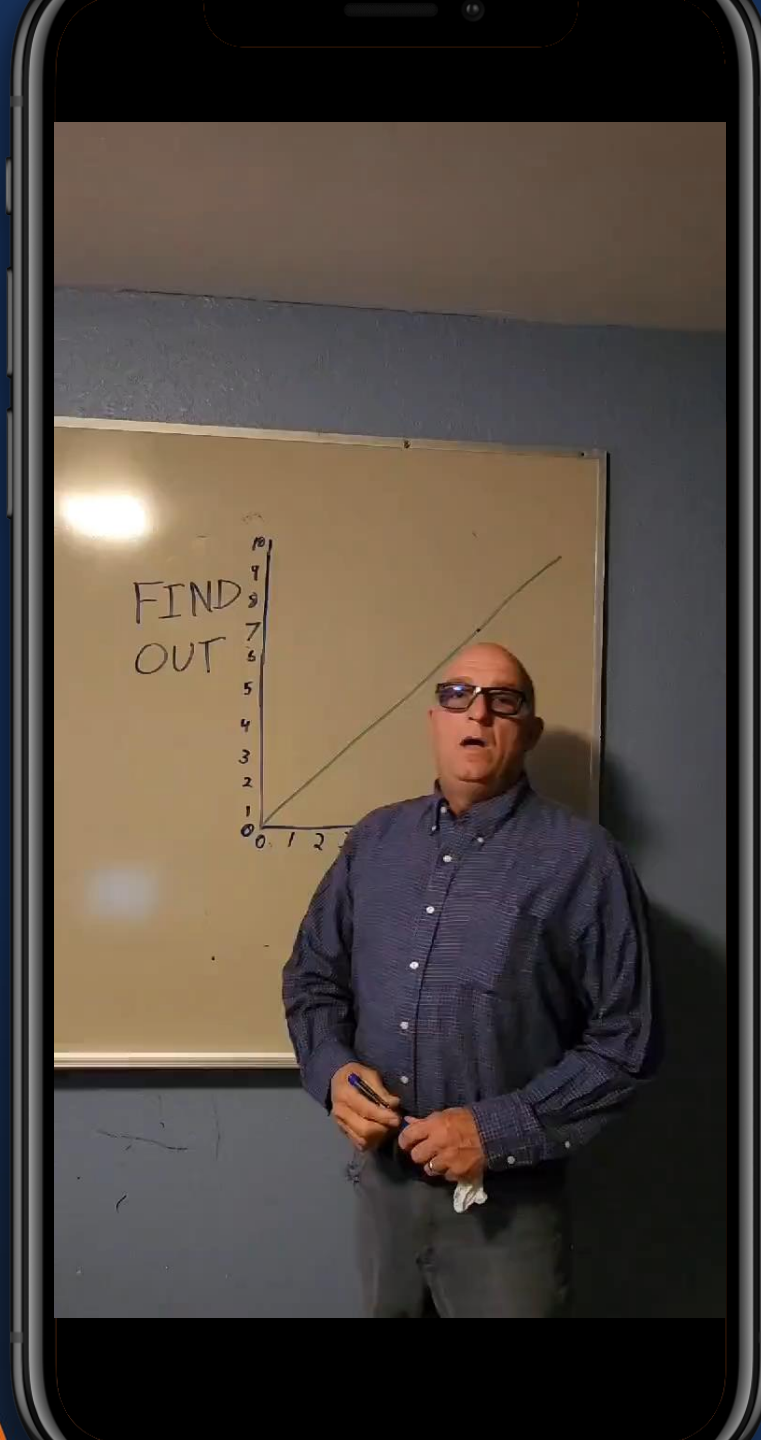




**MORE** Listings, from  
my Listings, by creating  
**MORE Attention!**

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

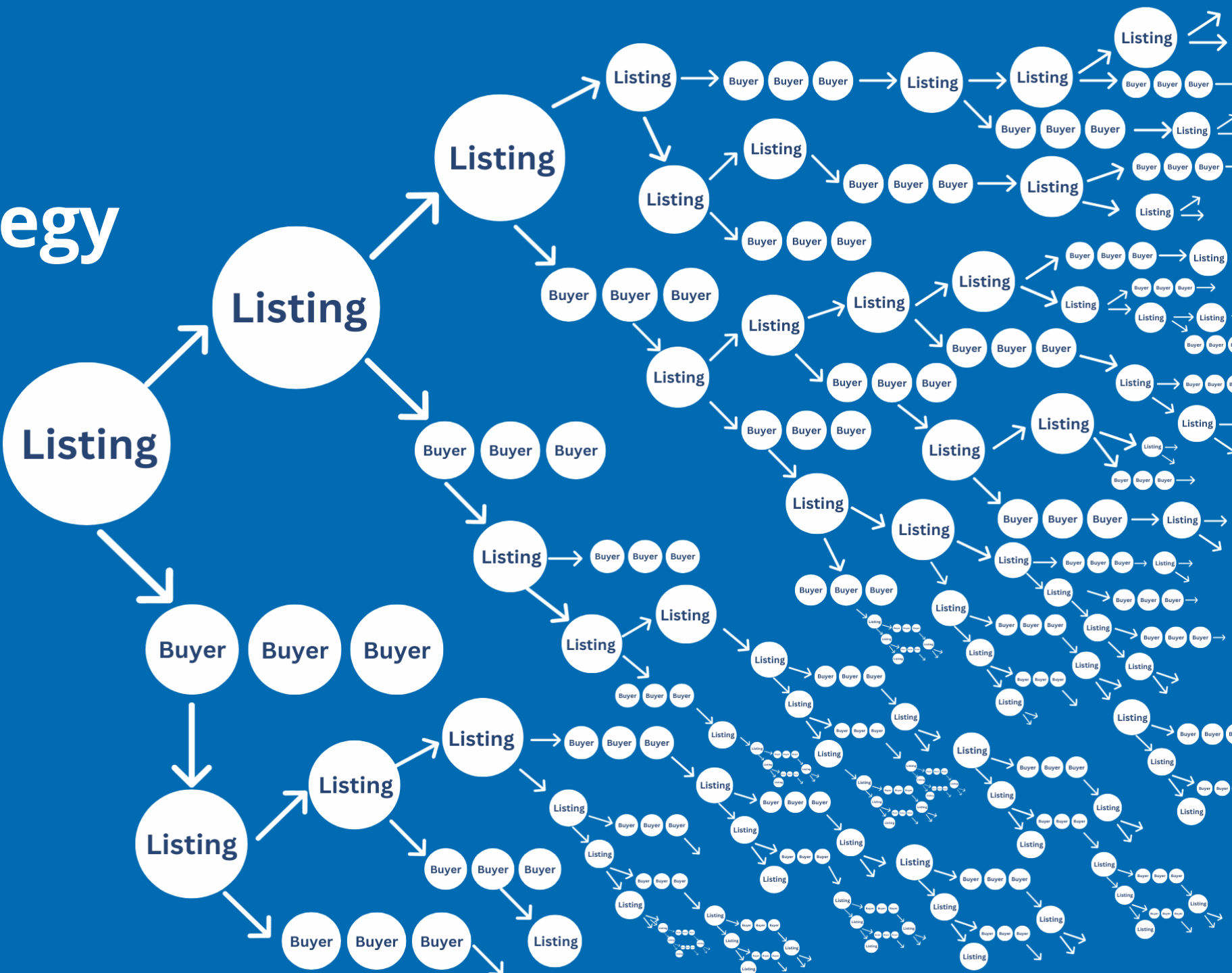




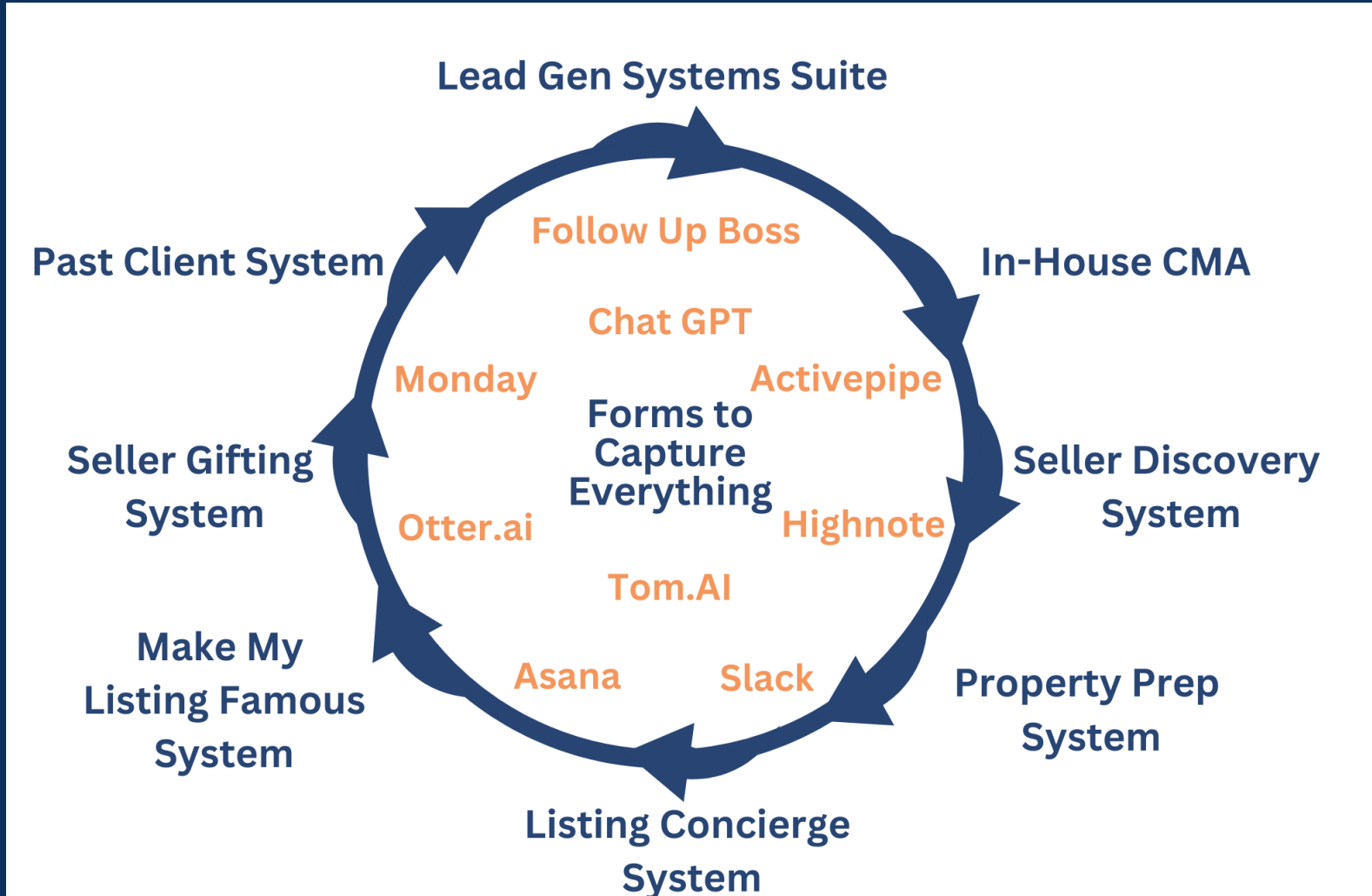
TF TomFerry

## How to Find Out What Works?

# The Viral Listing Strategy



# BUILD YOUR LISTING FLYWHEEL



# How do I turn one into 3 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.

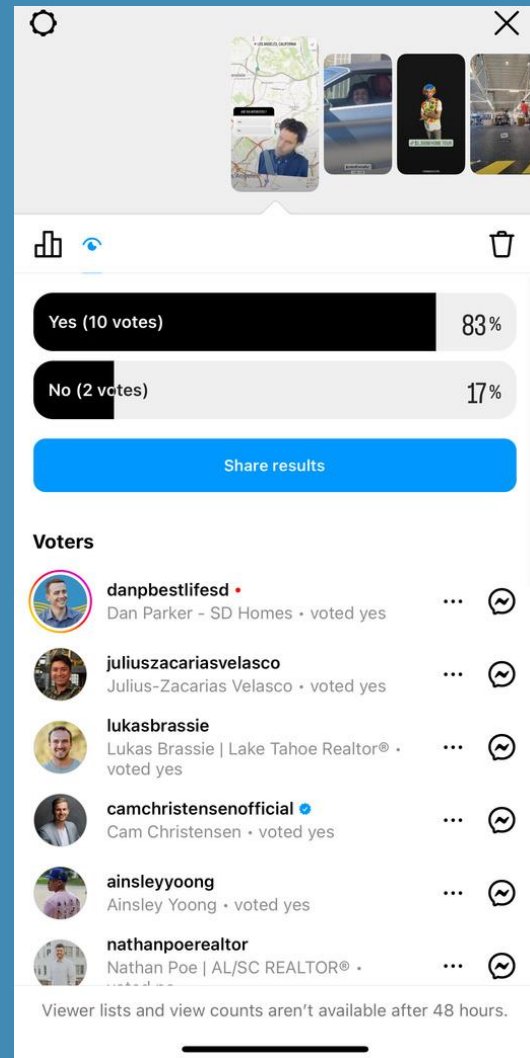
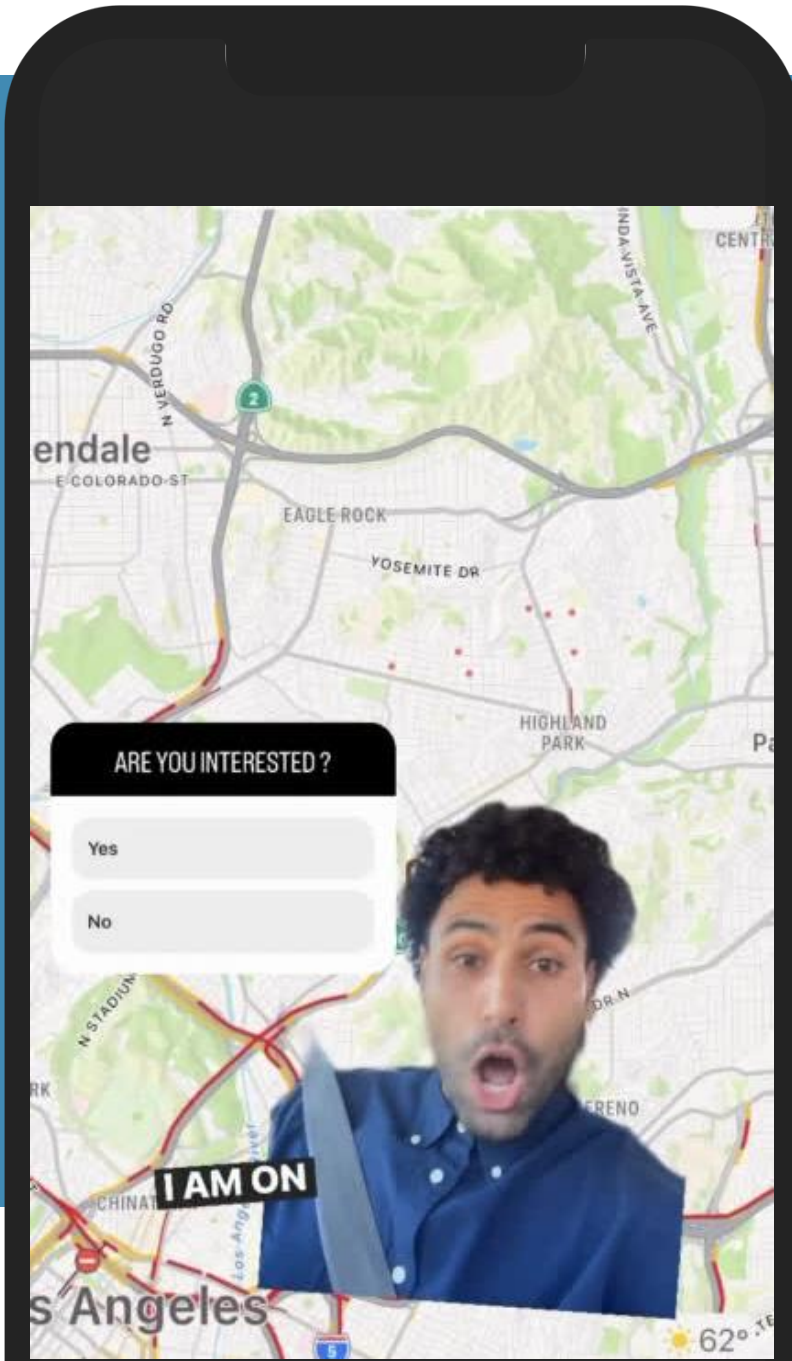
What I can tell you is that homes like this typically sell above ask in just a few days

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.



# REVENUE



# solves everything



**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. 799



### 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

**THE LISTING EDGE**

# 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

Did you  
*hear about*  
your neighbor?

Scan here to find out!



PRESORTED  
STANDARD  
US POSTAGE  
PAID  
REAL MARKETING

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**Creates  
Curiosity!**



Did you  
*hear about*  
your neighbor?

Scan here to find out!



PRESORTED  
STANDARD  
US POSTAGE  
PAID  
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

Name

Email

Email \*

Phone

Phone

Address

Address



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

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THE LISTING EDGE



# **STEPHANIE** Younger

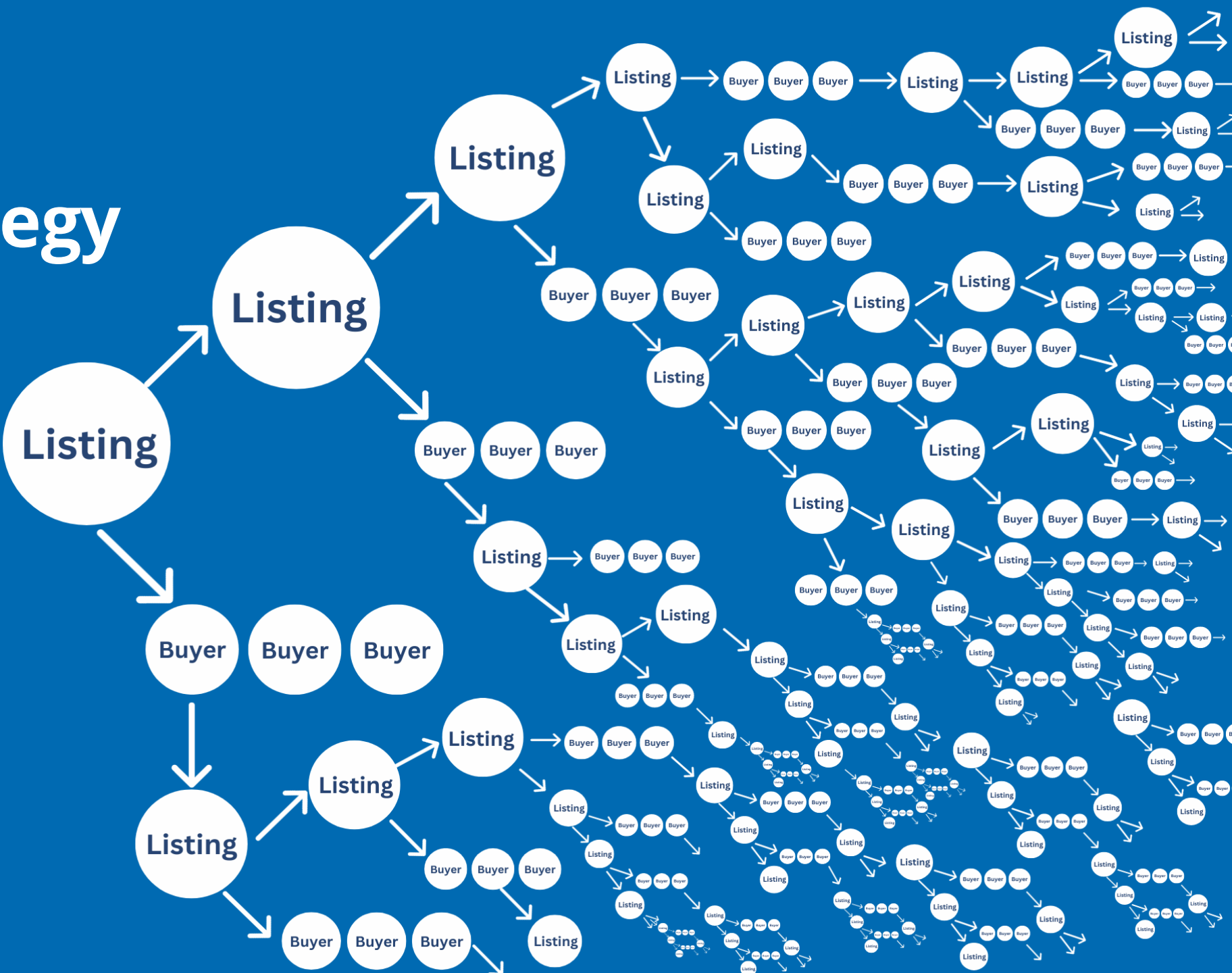
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**@Compass  
Los Angeles**

# 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



# REVENUE



solves everything



# Akrasia Effect

**Akrasia** is the state of acting against your better judgment. it is when you do one thing even though you know you should do something else. Loosely translated, you could say that akrasia is procrastination or a lack of self-control.

**Akrasia** is what prevents you from following through on what you set out to do.



# *Thank You to Our Sponsors*





# Lunch

THE LISTING EDGE



Test your roleplaying skills with instant feedback

Compare your performance to other agents

"Roleplay" is just ONE of many TomAI+ features for coaching clients



<https://roleplay.tomferry.com>





# Jason **PANTANA**



# REVENUE



solves everything





**THE LISTING EDGE**

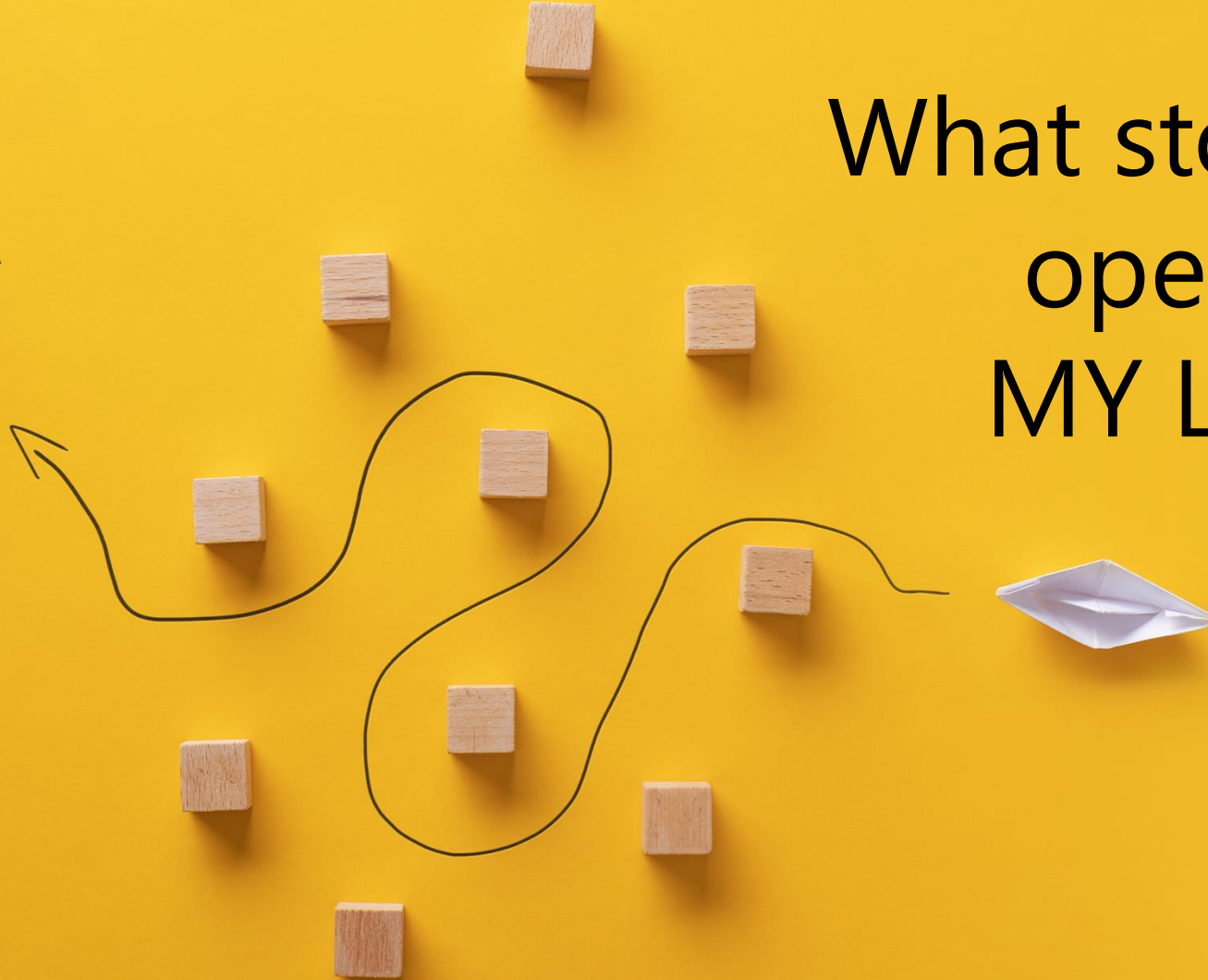


# Why Don't I Really Play Full Out?





What stops me from  
operating at  
MY LEVEL 10?



The Addiction to...

# OPINIONS OF OTHERS





The Addiction to...

# DRAMA



THE LISTING EDGE



The Addiction to...

# THE PAST



THE LISTING EDGE

The Addiction to...

# WORRY





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



THE LISTING EDGE

# Break

THE LISTING EDGE



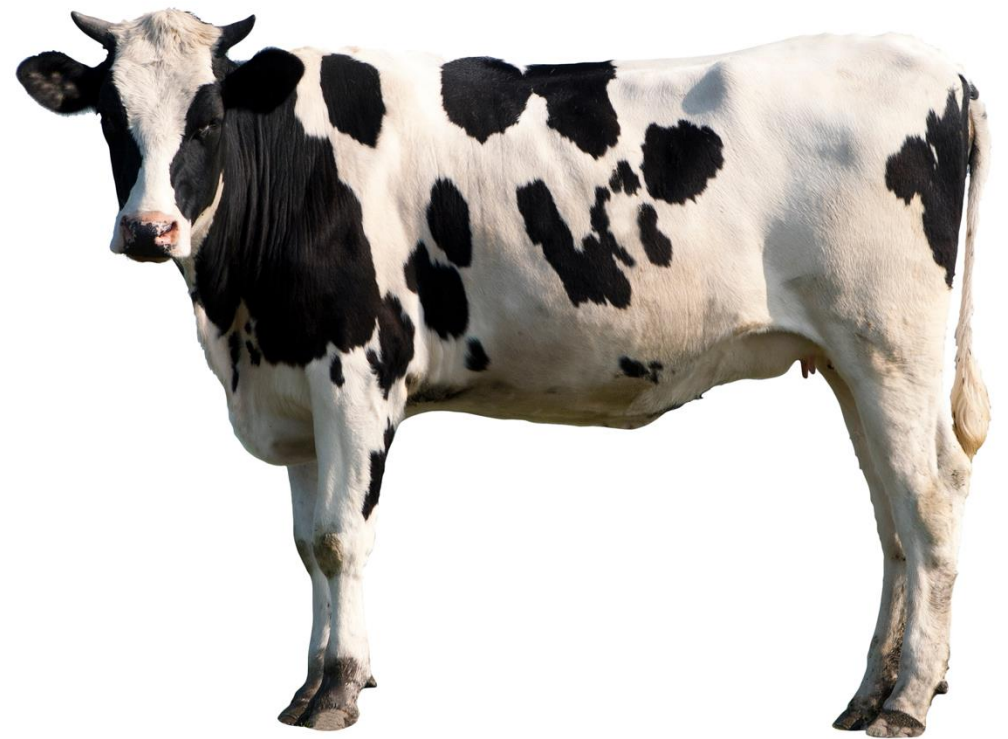
**COACH**

Kristi  
**JENCKS**





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







THE LISTING EDGE



The background of the slide is a light blue map showing a network of streets and roads. In the upper right corner, there is a large, thin orange circle. A thin orange horizontal line spans the width of the slide, positioned just above the main text.

# Who has Noticed the Sales Cycle Getting Longer?



# Why Most Agents Fail to Earn What They Deserve?



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%                  |
| <b>Total</b>         | <b>4416</b> | <b>91</b> | <b>2.1%</b>       | <b>419</b> | <b>18%</b>           |



**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



**Work like a  
hair salon!**



# 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?

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)



**THE LISTING EDGE**





**THE LISTING EDGE**



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



**What are you  
thinking?**



Don't practice on customers and clients

Scan to try TomAI+ Roleplay

Critical scenarios, leaderboards, instant feedback



<https://roleplay.tomferry.com>



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



# 5 Things

THE LISTING EDGE





**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!

THE LISTING EDGE





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

| SALES  | OPERATIONS  | MARKETING  | RECRUITING  | FINANCE / LISTINGS   |
|--|---|--|---|--|
| <ul style="list-style-type: none"> <li>401 units, 170M volume,</li> <li>↑ conversion by 5%</li> </ul>  | <ul style="list-style-type: none"> <li>Scale for 10 new agents/month</li> <li>Streamline training platform</li> <li>Operationalize conversion</li> </ul>  | <ul style="list-style-type: none"> <li>2 transactions for every listing</li> <li>1% conversion of database</li> <li>50 closed deals from social media</li> </ul>   | <ul style="list-style-type: none"> <li>+ 4 agents per month</li> <li>+ 24 legacy agents</li> <li>4 recruiting events</li> </ul> |  |
| Conversion Tracking System<br>Trainual - Lessons<br>Trainual - Video Support<br>Lead Rotation Management<br>Mentor Training<br>Establish Tiers<br>Visual for bullpen<br>Tracking System<br>Hire ISA<br>Train ISA | Trainual - Onboarding<br>Trainual - New Agent Training<br>Trainual - Exp Agent Training<br>Trainual - All JMO Processes<br>KPI Tracking System<br>Campaigns for Zip Codes<br>Cognito<br>Sold.com<br>Google Voice<br>Last Pass<br>ISA System (c)<br>Action Plan - Buyer Under Contract<br>Action Plan - Seller Under Contract<br>Agent Checklist / Task Reminders<br>Circle Dial<br>Google Reviews | <div>Website Goods</div> <div>SE<br/>SW<br/>NE<br/>NW</div> <div>Action Plans</div> <div>Seller Narrative<br/>Explores<br/>New Construction<br/>Lease 1 year<br/>Lease 2 year<br/>FSBO</div> <div>Recruiting Emails (24)<br/>Buyer Presentation<br/>YouTube Ads<br/>Google PPC</div> <div>VIDEO</div> <div>Listing Campaign</div> <div>Favorite Room<br/>Professional office<br/>Listing presentation<br/>Listing coordinator<br/>Photographer<br/>Mailbox<br/>Staging<br/>Neighborhoods<br/>Re-Sharing a house/club<br/>Support Team<br/>Showing Smart<br/>Setting seller expectations<br/>Se. Julepa<br/>Open House<br/>What good commercial<br/>Language<br/>Super vs. Local Buy</div> <div>Recruiting Campaign</div> <div>Tools to Secure<br/>Lead Capture<br/>Training (Dial) / Network<br/>Listing collateral</div> <div>Community Pages</div> <div>Casa del<br/>Grand Lakes<br/>Rhythm<br/>Bridgewater<br/>Cane Island<br/>Old Mary<br/>Cinn. SW<br/>CASA CREEK</div> <div>Other</div> <div>Seller - Listings Live<br/>Seller - Under Contract<br/>Buyer - Buyer guarantee<br/>Buyer - Looking at homes<br/>Buyer - Closing table</div> | <div>calls per day</div> <div>interviews per week</div> <div>Q1 event</div>   | SISU → CTE<br>Tracking System<br>Referrals<br>Legacy<br>Pod Leaders<br>2023 Budget<br>List to close process refinement<br>supra/sign pick-up<br>client on line email<br>Slack until closing<br>Caption Vault<br>Listing Coordinator Hire |



Jamie McMartin

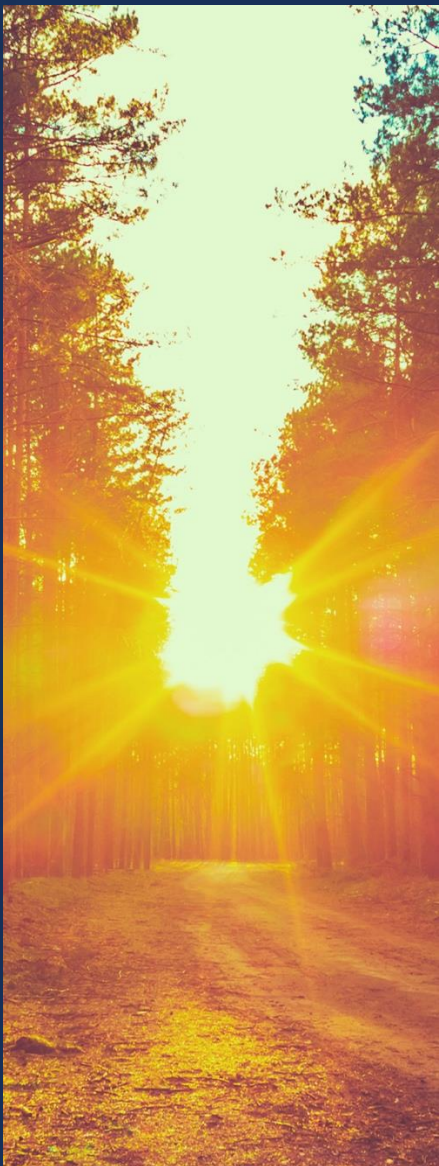
“Remember, if it’s not  
in my schedule,  
**it doesn’t get done!**”

Tom

THE LISTING EDGE







# 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***

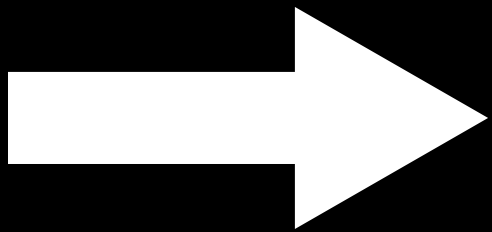
- 1. Weekly Dashboard Review/Commitments**
- 2. Weekly Marketing Meeting**
- 3. Weekly Sales Improvement Meeting**
- 4. A Focused Weekly Coaching Session**

# REVENUE

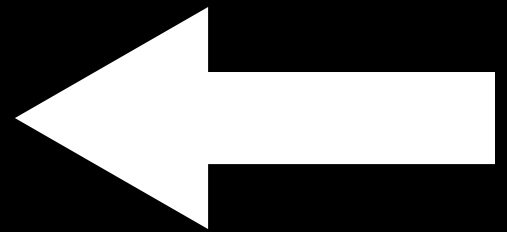


solves everything

**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

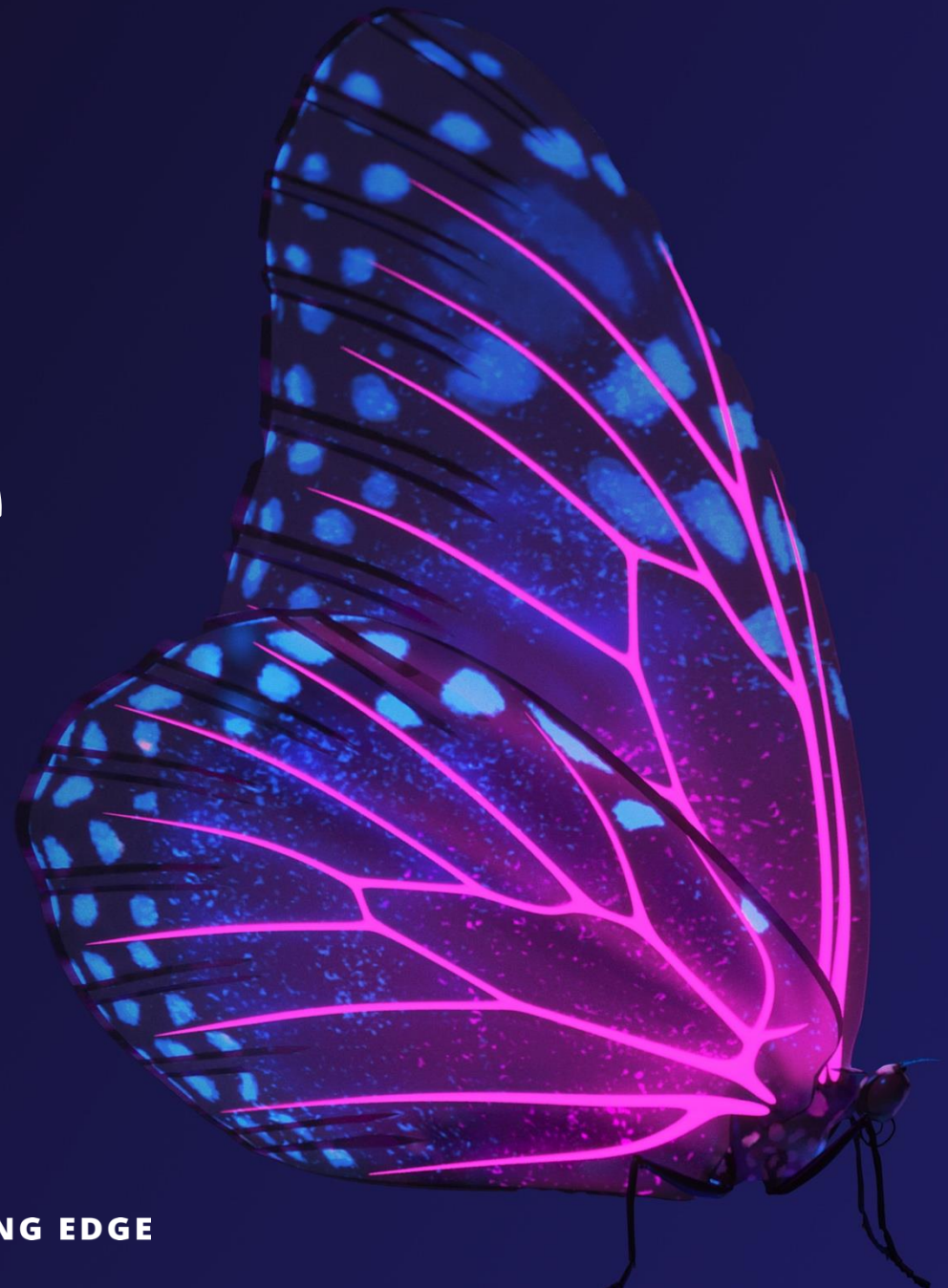
- ☐ Be the CEO, review everything in my business!
- ☐ Review plan to actuals (*with my manager/coach*)
- ☐ Budget review (*with my manager/coach*)
- ☐ Set aside (*X%*) for taxes
- ☐ Set aside (*Y%*) for investment
- ☐ Review next month / quarter marketing campaigns
- ☐ Review the monthly results & action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



For things  
to change



# Things have to change



THE LISTING EDGE

**What am I  
Committed to?**

**Thank your  
title partner!**

THE LISTING EDGE



CHICAGO TITLE®



**Fidelity National Title**



**TICOR TITLE®**



**VALLEY TITLE**



Powered By

# PalmAgent

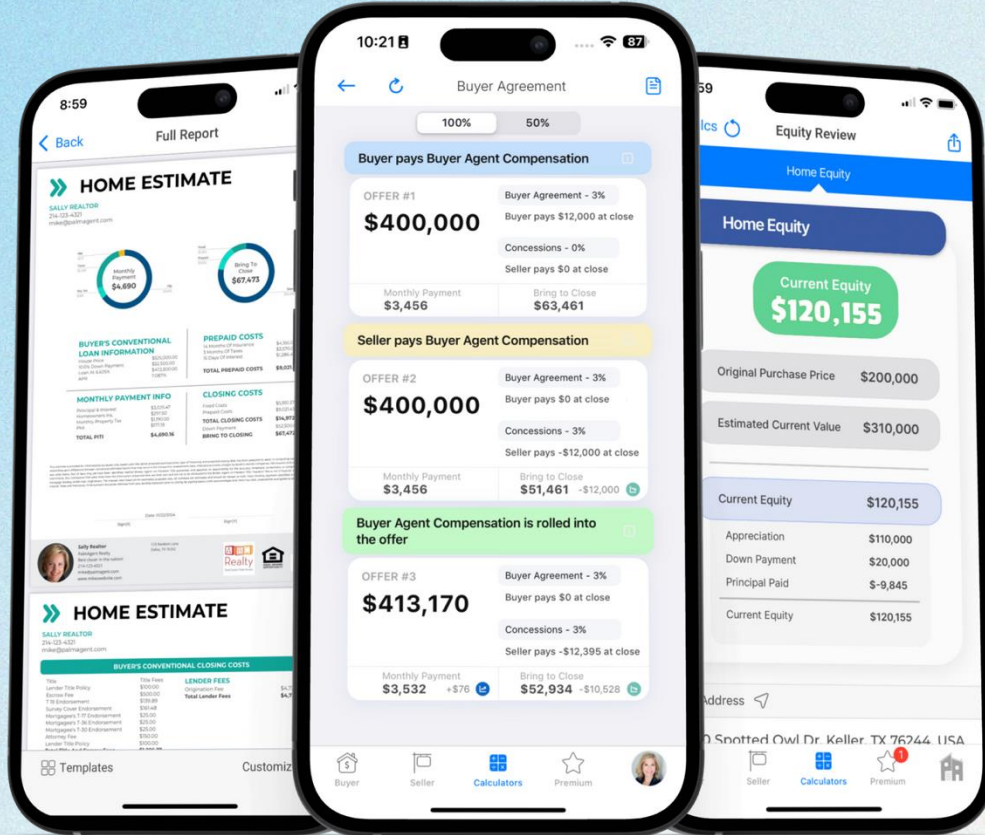
Real Estate's #1 Closing Cost

App



Seattle Roadmap

Scan to Download



ChicagoAgent  
t



TicorAgent  
t



FidelityAgent  
t



ValleyTitleApp





thank  
you

THE LISTING EDGE



# Agents' Roles are Changing

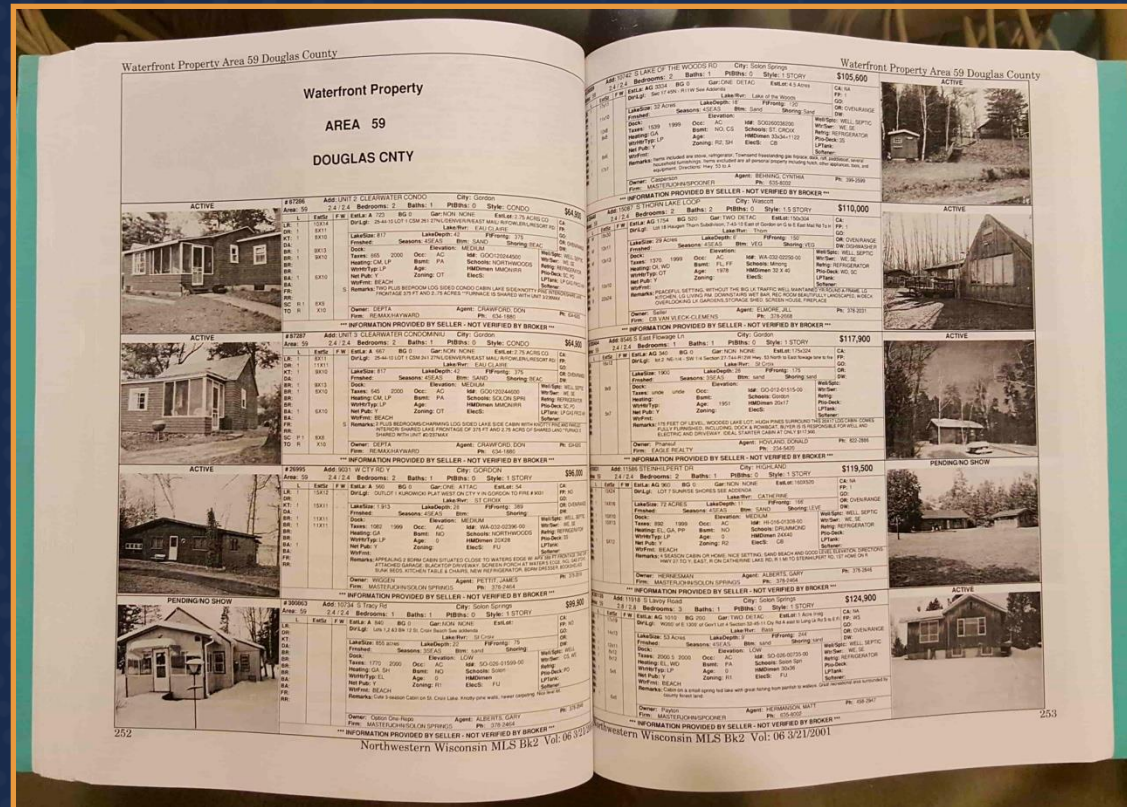
“Smart agents & teams will begin educating & marketing their **“PROCESSES”** that emphasize how to make buying **“easier”, “more convenient”, less stressful”, “protecting their interests”, even “safer”... FIRST!**



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

*Tom J*

# PREDECESSOR

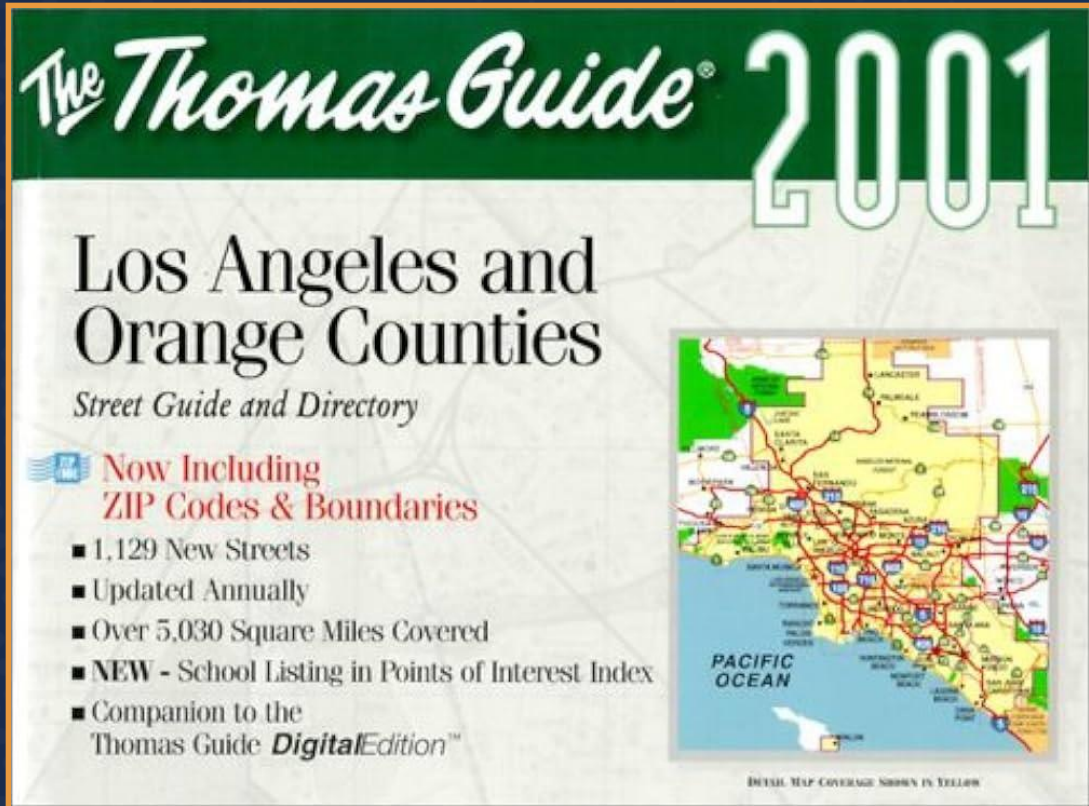


# SUCCESSOR





## PREDECESSOR



## SUCCESSOR




# PREDECESSOR



# SUCCESSOR







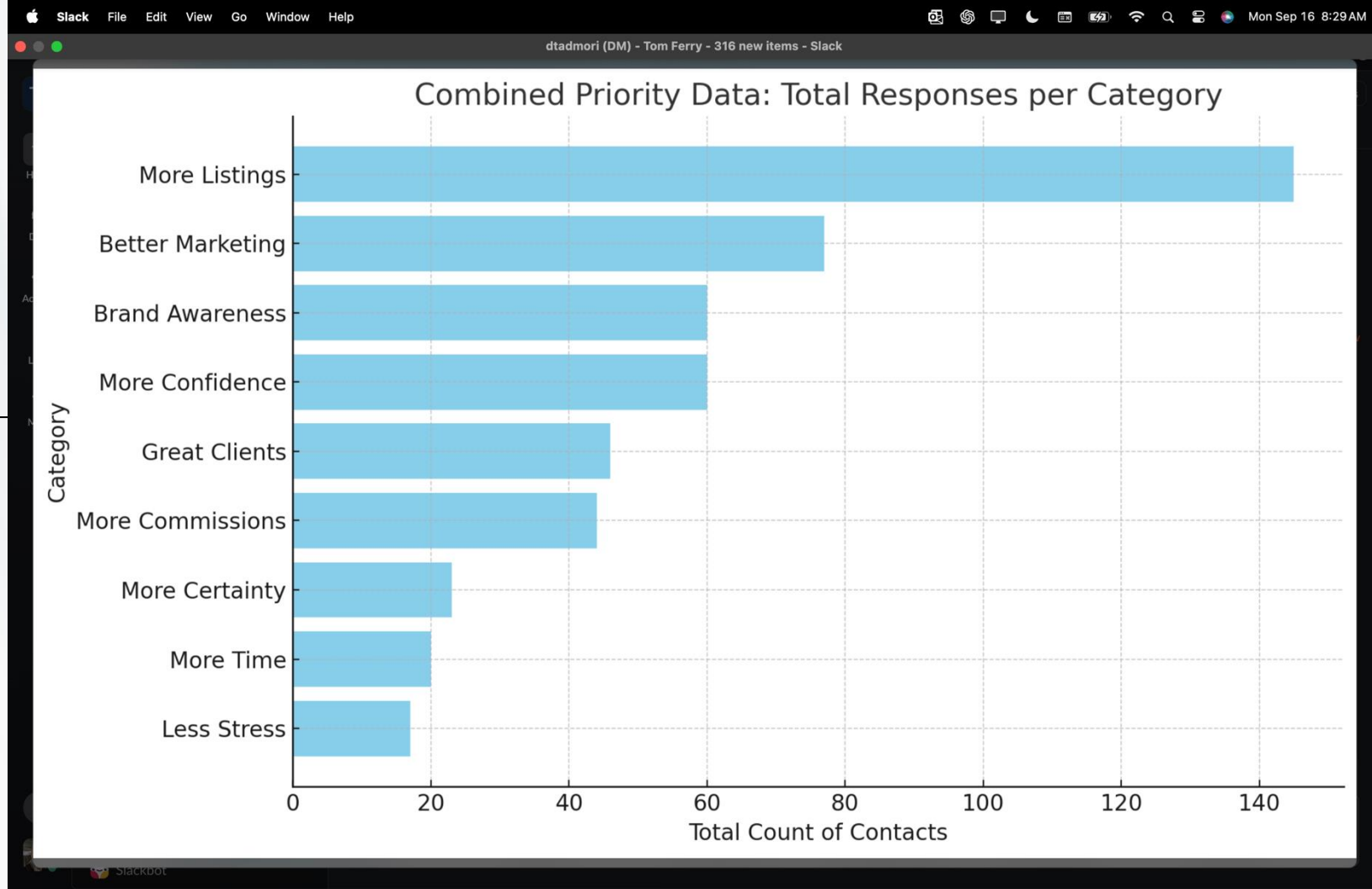
What did you do during  
the pandemic?



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

**We just surveyed  
over 25,000  
agents**





Yes. Frontloading.

19%

**Wants!**

**More time.**

**More money.**

**Less stress.**

**More listings.**

**More certainty.**

# MARKETING



# FOLLOW UP



# SKILLS





# LISTINGS



# ONE TO THREE



# MARKETING FOLLOW UP SKILLS LISTINGS ONE TO THREE







SO WHERE ARE  
YOU **STUCK?**



# REVENUE



solves everything





How will I create  
**MORE** Attention?



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

# 6% From Life Events



Diapers



Death



Diamonds



Divorce



Diplomas



Defaults

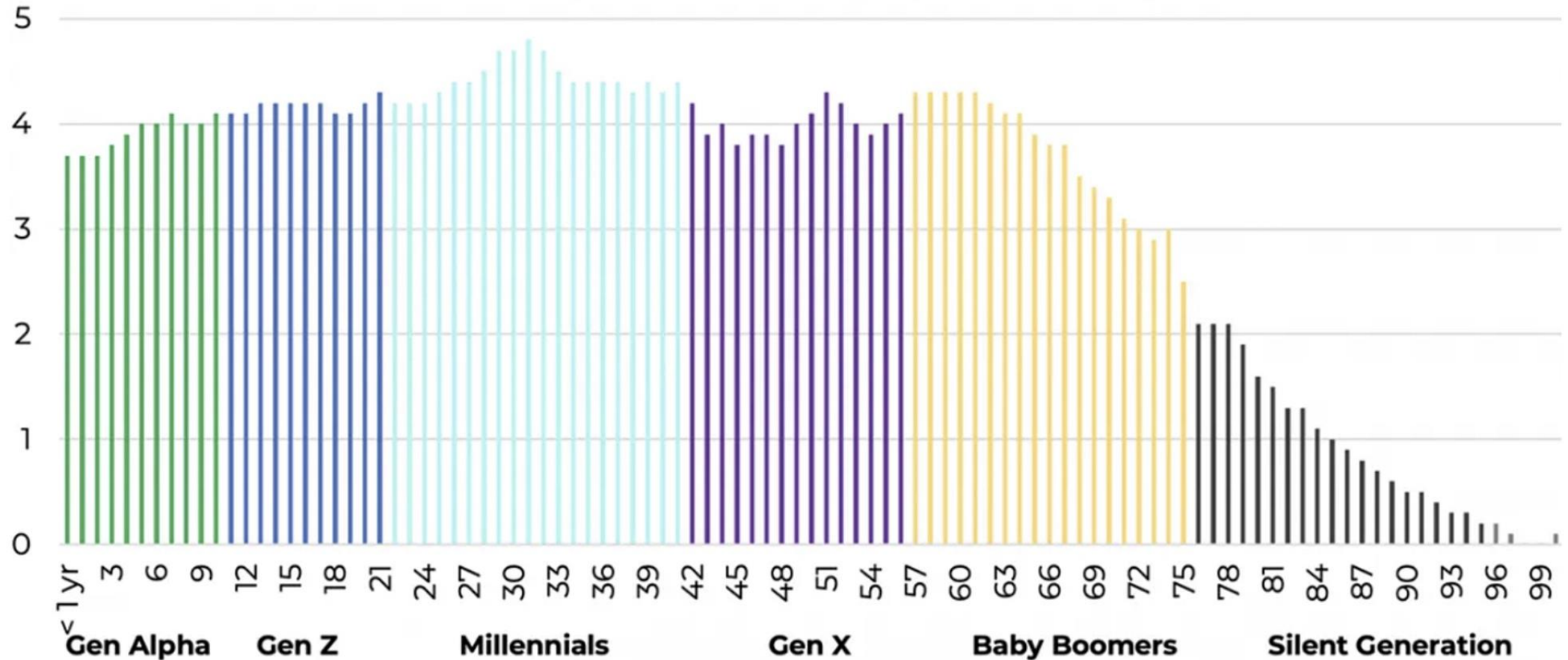


D'Relocation



# 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)

THE LISTING EDGE





**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?**

THE LISTING EDGE

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 LISTING EDGE



@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?

THE LISTING EDGE

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

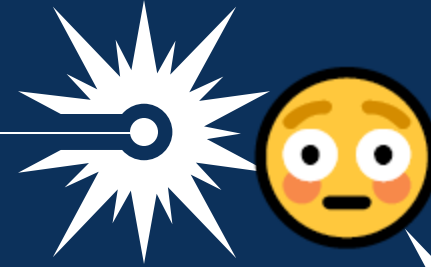
**Q: What obstacles will I face?**

# Obstacles

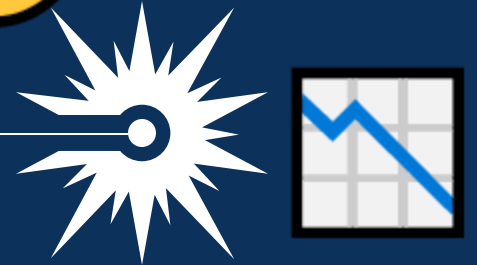
*to overcome!*

# Four converging forces impacting 2024

**AN ELECTION YEAR**



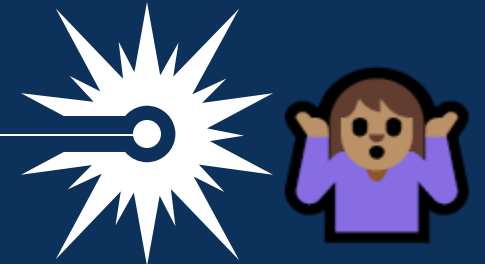
**THE RATES**



**PENT UP DEMAND**



**LACK OF INVENTORY**



**What do we**  
**know...**



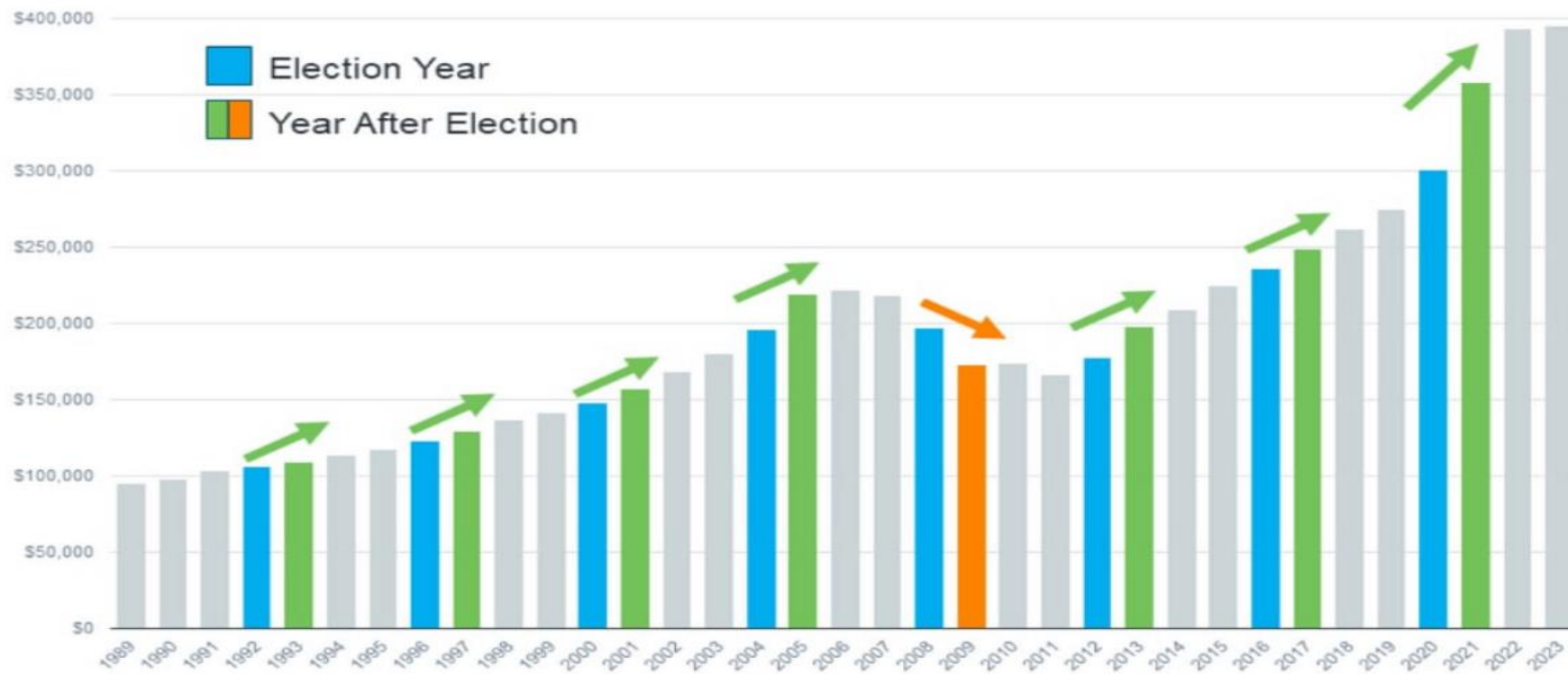
# HOME SALES WENT UP AFTER 9 OF THE LAST 11 PRESIDENTIAL ELECTIONS

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



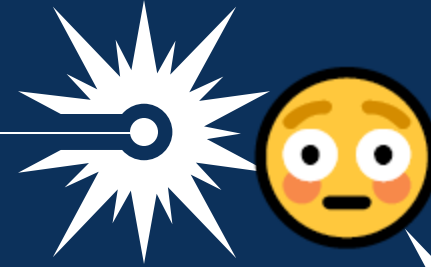
# MORTGAGE RATES DECREASED LEADING UP TO 8 OF THE LAST 11 PRESIDENTIAL ELECTIONS

Change from July to November of Recent Election Years

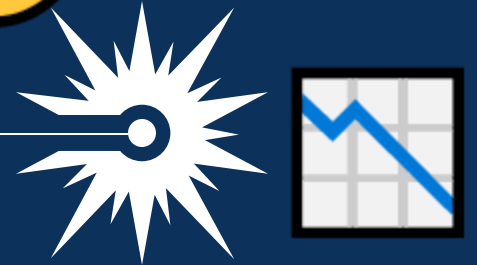
| Election Year | Change           | Difference |
|---------------|------------------|------------|
| 1980          | 12.19% to 14.21% | +2.02%     |
| 1984          | 14.67% to 13.64% | -1.03%     |
| 1988          | 10.43% to 10.27% | -0.16%     |
| 1992          | 8.13% to 8.31%   | +0.18%     |
| 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**



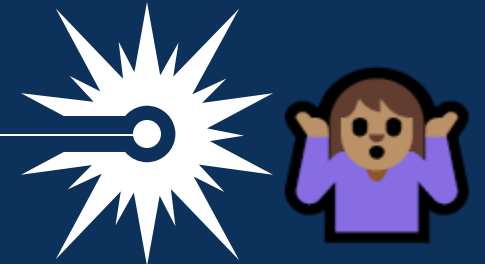
**THE RATES**



**PENT UP DEMAND**



**LACK OF INVENTORY**



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

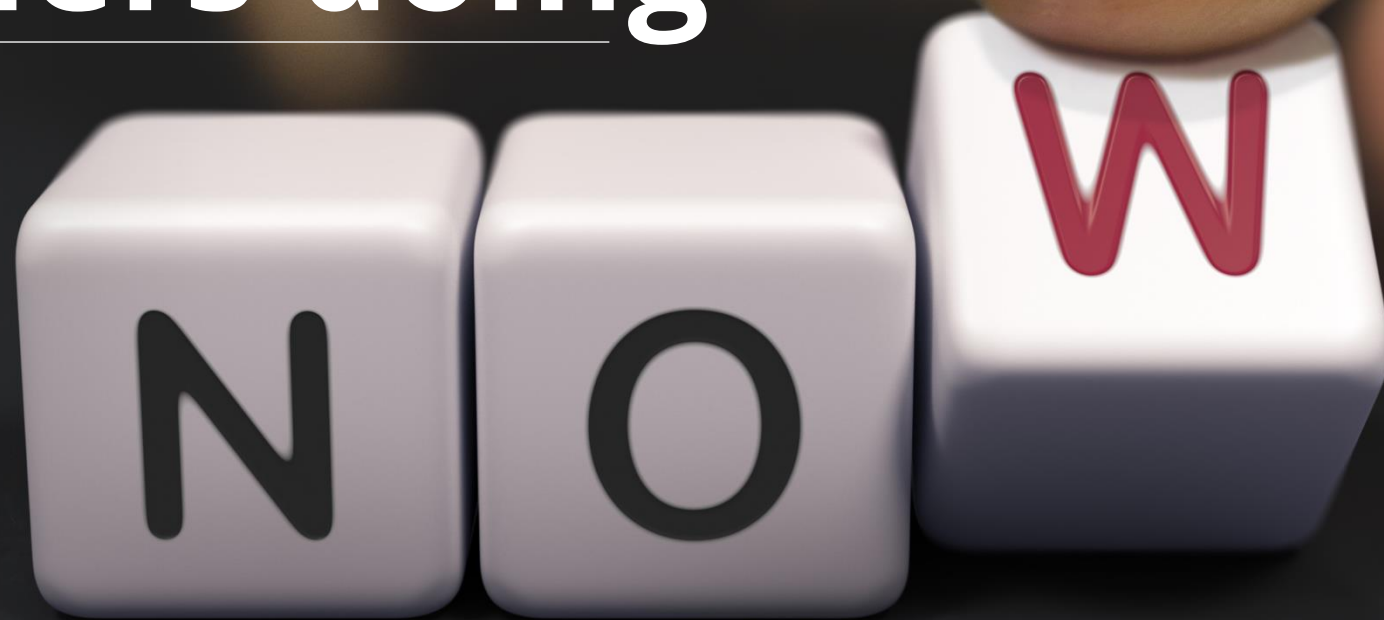


**It's now a prerequisite:  
Agents & Teams must Know,  
Show & Demonstrate Their  
Value to Earn a Fee**

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

# What are others doing



---



THE LISTING EDGE




# Signed April=108 | April=62


 x 

## 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
- COMI


- 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

THE LISTING EDGE



**Want to know**  
**H****W?**

**THE LISTING EDGE**



# 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 vast blue ocean. A large, dark whale is swimming vertically, its tail fluke visible at the top. In the lower center, a small yellow kayak with a person inside is moving towards the whale. The text is overlaid on the right side of the image.

---

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 vast blue ocean. A large, dark whale is swimming vertically, its tail fluke visible at the top. In the lower center, a small yellow kayak with a person inside is moving towards the whale. The text is overlaid on the right side of the image.

---

If you make it  
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**Just ASK!** 😊

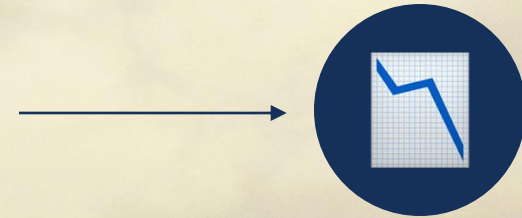


# Choose your hard

**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



THE LISTING EDGE



# 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

\* Courtesy of The Svelling Group

# 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!

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"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!

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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?



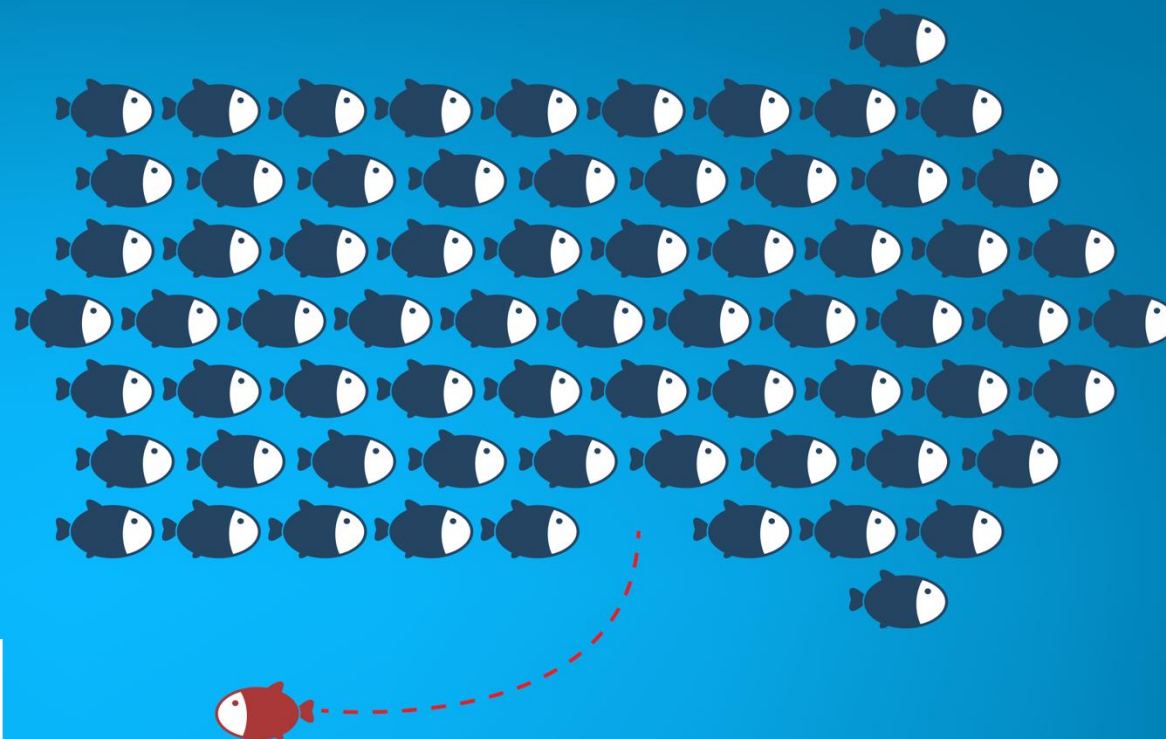
All **Great Businesses** have Six things in common...

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**



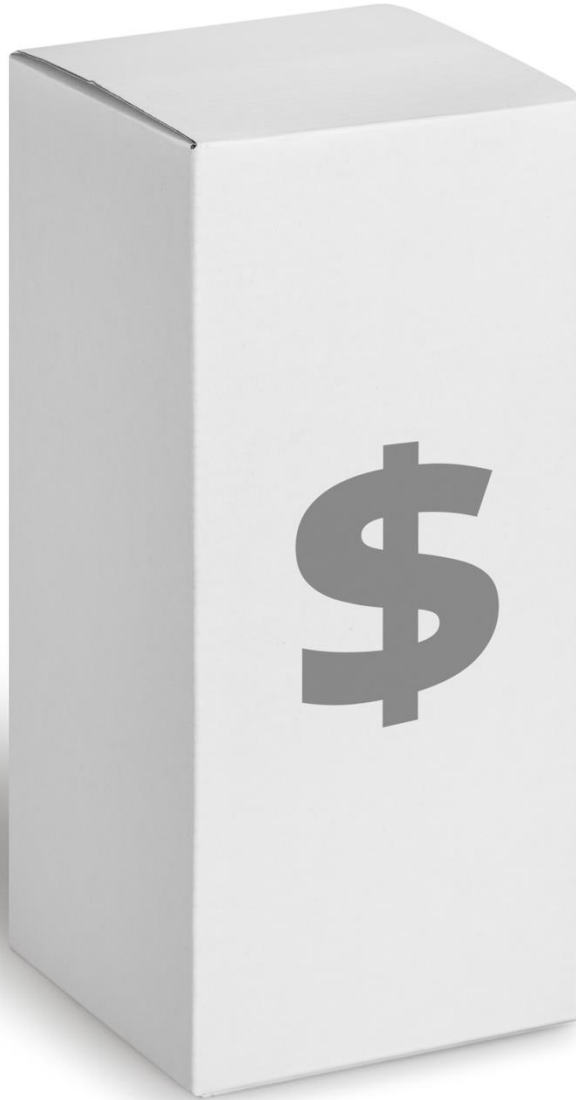
How are you  
Differentiating Yourself?





**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?**

**THE LISTING EDGE**

**PHIL  
GERDES**

*SOCIAL*

**MATT  
CURTIS**

*BILLBOARDS*

**SHANNON  
GILLETTE**

*TELEVISION*

**MAUREEN  
FOLAN**

*MAILERS*

**KRIS  
WEAVER**

*RADIO ADS*

**KEN  
POZEK**

*VIDEO*



THE LISTING EDGE





3

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



 realtor.com<sup>®</sup>

THE LISTING EDGE



**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 tree. The text "Not Your Daddy's Realtor" is written in a large, white, serif font across the top. In the bottom left corner, there is text about the agent's name and phone number. In the bottom right corner, there is a logo for "THE Shelhamer REAL ESTATE GROUP" and a phone number.

# *Not Your Daddy's Realtor*

Todd Pivetti | DRE 02133855  
Residential, income, and more

THE  
**Shelhamer**  
REAL ESTATE GROUP  
01960995

**THE LISTING EDGE**



**THE LISTING EDGE**



**What are you  
thinking?**



What am I  
**committed** to  
regarding my  
Brand?