



Day 1

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TOMX

Lori **BOGLE**

Balancing Act: Nurturing Business While Living Fully

 Centerville, IA
 loribogle@boglerealty.com
 [lori_bogle](#)

Homes sold: **153**

GCI: **\$566,727**

Volume: **\$18,614,880**



LORI BOGLE

BROKER|OWNER® - BOGLE REALTY, CENTERVILLE, IA

BALANCING ACT: NURTURING BUSINESS WHILE LIVING FULLY



Focus On What Matters

It's important to focus on what truly drives our success and how we can create more time for the activities that matter most.



AVERAGE HOME PRICE CENTERVILLE, IOWA

• 2012

- \$55,000
 - 3 Bedrooms – 1 Bathroom
 - Built in 1920
 - 1,104 Sq Ft
 - 2 Car Garage
- **Total Sales: \$825,000**
- **GCI: \$12,375**

• 2023

- \$128,000
 - 3 Bedrooms – 2 Bathrooms
 - Built in 1942
 - 1,384 Sq Ft
 - 2 Car Garage
- **Total Sales: \$6,062,977**
- **GCI: \$181,889**



Bogle Realty - 2015

I believed in my potential and knew that I could build something remarkable!

I needed to sell at least \$5 million in Real Estate.

Challenge Accepted!



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“There are two main areas you need to focus on:

- ***Money making actions for your production.***
- ***Money making actions for your business.”***

- Coach Carl Rizzuto



Bogle Realty Bloomfield

Just as we started with our coach in 2022, we opened our office in a second location!



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KEY STRATEGIES

1. Time Management

Time Management is crucial. Block mornings & evenings as time to maintain communication with both past and present clients.

2. Recruiting & Training

Created a 90-Day Onboarding Program that helped grow our team from 5 to 17 agents. Setting agents up for success independently.

3. Policies and Procedures

Implemented tools, created policies and procedures, and set up monthly meetings to maintain open lines of communication between offices and all agents.

4. Hire More Employees

Expanded our team with additional in-office employees that have been invaluable and a game changer for us. Don't be afraid to hire help!

5. Create Goal Boards

Established goal boards to include sales, listing and closed property goals, as well as yearly office goals that are monitored weekly and reviewed monthly.

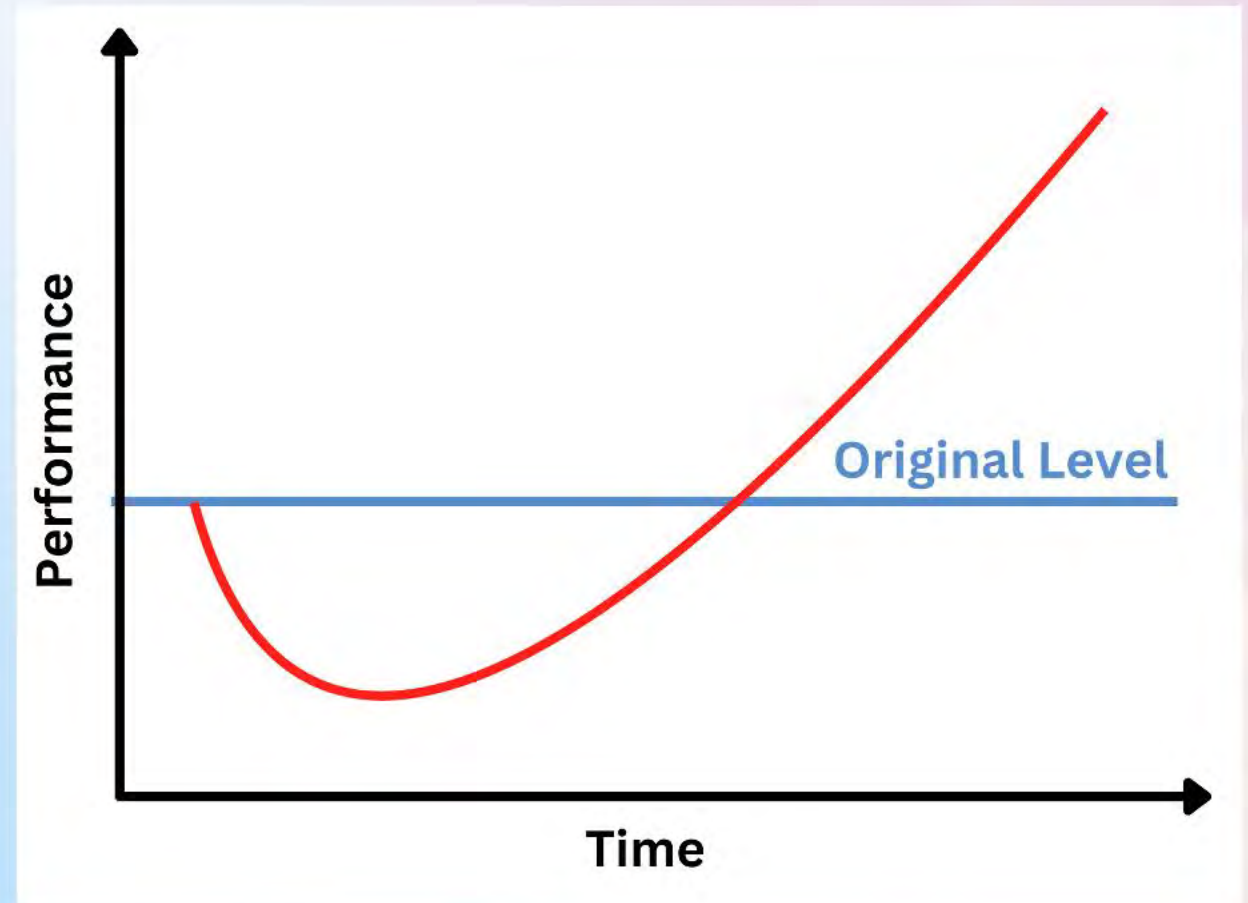


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The “J Curve” Effect

Sometimes you need to go down so you can go up.

Taking a step back can set the stage for greater growth and success before you can leap forward.



What we now have TIME for

- ✕ Community events and sponsorships
- ✕ Community youth sports events
- ✕ Donating meals for youth camps and programs
- ✕ Local county fairs
- ✕ Annual Thanksgiving Pie Day
- ✕ Christmas charcuterie boards to attorneys, lenders, and vendors
- ✕ Christmas and Thank You cards
- ✕ Closing care packages
- ✕ Pop-Bys
- ✕ More time for listings and marketing with passion
- ✕ Quality conversations with clients
- ✕ Hosting a monthly first-time homebuyers workshop and sellers consultations



In closing...

I encourage all of you to focus on:

- Income producing activities
- Delegating wisely
- Investing in your team's growth
- Taking a step back
- Leaping forward



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TOMX

April **NOESSEL**

Turning Passion into Precision



Auburn, CA



april@goldgroupus.com



april_noessel

Homes sold: **56**

GCI: **\$531,660**

Volume: **\$23.496M**



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April Noessel

5 Years to Rockstar:
Goal-Setting Systems



Goal Setting

	SOME DAY	END OF 2023	END OF 2024	END OF 2025	BY 2024	THIS QUARTER	THIS MONTH	THIS WEEK
PROFESSIONAL								
HEALTH & FITNESS								
FINANCIAL								
PARENT								
PERSONAL DEVELOPMENT					Speaker at Summit + more speaking roles			
RELATIONSHIPS								
ENTREPRENEURSHIP								
RECREATION								



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Time Blocking

	Monday	Tuesday	Wednesday	Thursday		Friday	Saturday	Sunday
4:30:00 AM	Morning Routine	Morning Routine	Morning Routine	Morning Routine	4:30:00 AM	Morning Routine	Morning Routine	Morning Routine
5:00:00 AM					5:00:00 AM			
5:30:00 AM					5:30:00 AM			
6:00:00 AM	Exercise	Exercise	Exercise	Exercise	6:00:00 AM	Exercise	Exercise	Personal
6:30:00 AM	Get Myself Ready	Get Myself Ready	Get Myself Ready	Get Myself Ready	6:30:00 AM	Get Myself Ready	Personal	
7:00:00 AM	Leave for Office	Leave for Office	Leave for Office		7:00:00 AM	Leave for Office		
7:30:00 AM	Breakfast	Coaching	Breakfast	Breakfast	7:30:00 AM	Breakfast		
8:00:00 AM	Social Media	Breakfast	Social Media	Leave for PCAR	8:00:00 AM	Social Media	Breakfast	Breakfast
8:30:00 AM	Prep Week	Social Media	Check Loans	PCAR/B-Fast	8:30:00 AM	Check Loans	House Projects	
9:00:00 AM	Meet w/ Assistant	Meet w/ Assistant	Meet w/ Assistant		9:00:00 AM	Meet w/ Assistant		
9:30:00 AM	Check Loans	Check Loans	Brokerage	Meet w/ Assistant	9:30:00 AM	Admin		
10:00:00 AM	Appointment Setting	Appointment Setting	Appointment Setting	Appointment Setting	10:00:00 AM	Appointment Setting	Sports	
10:30:00 AM					10:30:00 AM			Reset for Week
11:00:00 AM					11:00:00 AM			Laundry
11:30:00 AM					11:30:00 AM			Clean House
12:00:00 PM	Lunch	Lunch	Lunch	Lunch	12:00:00 PM			Meal Plan
12:30:00 PM	Real Estate	Walk	Walk	Walk	12:30:00 PM			Grocery Shop
1:00:00 PM		Real Estate	Record YouTube	Real Estate	1:00:00 PM	Lunch		Home Projects
1:30:00 PM					1:30:00 PM	Weekly Wrap Up		Plan Week
2:00:00 PM		Projects	Projects	Projects	2:00:00 PM	Golf		Etc
2:30:00 PM	Projects				2:30:00 PM			Personal
3:00:00 PM	Google Form	Appointments	Appointments	Meeting	3:00:00 PM			
3:30:00 PM	Appointments				3:30:00 PM			
4:00:00 PM					4:00:00 PM			
4:30:00 PM				Appointments	4:30:00 PM			
5:00:00 PM	Leave for Home	Leave for Home	Leave for Home	Leave for Home	5:00:00 PM	Leave for Home	Dinner	
5:30:00 PM	Dinner	Dinner	Dinner	Dinner	5:30:00 PM	Dinner		Family Dinner Out
6:00:00 PM					6:00:00 PM			
6:30:00 PM					6:30:00 PM			
7:00:00 PM					7:00:00 PM			Yoga
7:30:00 PM					7:30:00 PM			
8:00:00 PM					8:00:00 PM			
8:30:00 PM	Nighttime Routine	Nighttime Routine	Nighttime Routine	Nighttime Routine	8:30:00 PM	Nighttime Routine	Nighttime Routine	Nighttime Routine
9:00:00 PM	SLEEP	SLEEP	SLEEP	SLEEP	9:00:00 PM	SLEEP	SLEEP	SLEEP
9:30:00 PM					9:30:00 PM			
	Professional	Income Producing	Mom			Free Time/Recreation	Routines	Health & Fitness

TEMPLATE: Listing for sellers

Template



Workspace visible

Board

Table



Power-Ups

Automation

Filters



Pre-Listing

++ ...

Listing Agreement

Status: To do

Copy Key and Add Lockbox

Status: To do

Complete Property Profile

Status: To do

Staging Appointment

Status: To do

Photography/Drone Appointment

Status: To do

Pre-Open Escrow

Status: To do

Complete Disclosures

Status: To do

Create Listing Binder

0/5 Status: To do

Pre-Listing Inspections

0/5 Status: To do

+ Add a card

Showing Period

++ ...

Link to MLS Listing

Status: To do

Open House

Status: To do

Social Media Open House Ad

Status: To do

Brokers' Open

Status: To do

Just Listed Post on Social Media

Status: To do

Weekly Activity Updates

Status: To do

+ Add a card

Escrow

++ ...

Fully Executed Contract

Status: To do

Closing Timeline Dates

Status: To do

Open Escrow

Status: To do

Appraisal Prep

0/4 Status: To do

Seller Inspections

Status: To do

Receive & Negotiate Request for Repairs

Status: To do

Inspection Reports

Status: To do

Review Settlement Statement

Status: To do

Switch Utilities

0/7 Status: To do

Receive Inspection Contingency Removals

Status: To do

Escrow Company Signing Date

Status: To do

+ Add a card

Post Close

++ ...

Pick-up Signs and Lockboxes

Status: To do

Leave a 5 Star Review for the Team!

Status: To do

+ Add a card

+ Add

Listing Template



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Team Tasks



GOLDEN CIRCLE



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Team Tasks

Workspace visible

Board

Table

Calendar Power-Up

Power-Ups

Automation

Monday

[Monday]

Status: To do

KN

Buyer in search of

Status: To do

KN

Check blink apps

Status: To do

KN

Check Mail

Status: To do

KN

Google Local Service Ads

3 1 Status: To do

Priority: Lowest

KN

Uncheck all to-dos for the week

Status: Done

KN

Stone and e view open houses and brokers opens

Status: To do Priority: Medium

KN

Powerpoint

Status: To do

KN

Curbio whispering pines

Status: In progress

Priority: Medium

KN

gift of equity adm belnap

Status: To do Priority: Medium

KN

Adjust Karen Square 7/24 clock in to 9:00 AM, add break 7/26

3 Status: To do

KN

Hillcrest counter signed

Status: In progress Priority: High

KN

+ Add a card

Tuesday

Post reel

0/10 Status: To do

KN

Canva Post every Tuesday

7/7 Status: To do

KN

Comment and like engagement threads

Status: To do

KN

Canva Story

Status: To do

KN

Update upset featured transactions

Status: To do Priority: Low

KN

+ Add a card

Wednesday

Film YouTube

Status: To do

KN

Post reel

0/11 Status: To do

KN

Updated production

Status: To do

KN

Fast Break/Sales Huddle UWM video every Wednesday

Status: To do

KN

Canva Story

Status: To do

KN

COMMENT and like engagement threads AND COMMENT and like in my posts

Status: To do

KN

+ Add a card

Thursday

Brokerage wide email

3 Status: To do

KN

Resume

Status: To do

KN

Post Youtube @11am

1 Status: To do

KN

Edit YouTube

1 Status: To do

KN

Post Reel

0/10 Status: To do

KN

Order new business cards for Summit

1 Status: To do

KN

Bulk Email THURSDAY 1) newsletter 2)property 3)diy 4)blog

1 Status: To do

KN

Blog and pin to pinterest

Status: To do

KN

Square sign in for (4th Q 2023) 941 info

1 Status: To do

KN

Linkden engagement

2 Status: To do

KN

COMMENT and like engagement threads AND COMMENT and like comments on my posts

Status: To do

KN

50

Status: To do

KN

Canva Story

+ Add a card

Friday

Purple Flags-to be current by EOB Fridays

1 Status: In progress

KN

Friday emails

6 Status: To do

KN

Post reel

0/10 Status: To do

KN

Clear Red Flags and Voicemails

Status: To do

KN

Comment and like engagement threads

Status: To do

KN

Water Plants/Trash Out

Status: To do

KN

Canva Story

2 Status: To do

KN

Window Listings

KN

April to start NMLS CE

+ Add a card

Working on but does take time

Family picture for listing pres

buy a laminator

Create listing presentation laminated cards

Daily CMA

Status: To do

KN

Create PDF download

Status: To do

KN

Bard.google.com

Status: To do

KN

<https://www.tiktok.com/t/ZTR7ab5mU/>

1 Status: In review

KN

Get calhfa approved <https://www.calhfa.ca.gov/homeownership/directlenders.htm>-Created this card March 28th

2 Status: To do

KN

Redo marketing plan: Etsy

Status: To do

KN

Referral wall/map

Status: To do

KN

Find a new accountant

Create a placer county lifestyle fb group

+ Add a card

Trello Workspaces Recent Starred Templates Create

Personal Assistant Checklist Workspace visible Board Table

Monday: Office/Projects

Choose a membership that's right for Poppy

	Admin	Owner	Member
Poppy's micro chip (April to check which one she wants)	✓	✓	✓
Price out AC units	✓	✓	✓
Revamp Etsy listing	✓	✓	✓
All 3 boys bus passes	✓	✓	✓
Print out mailing labels for every in follow up bus by category	✓	✓	✓
Order business credit reports	✓	✓	✓
Check all Trello boards and skyslope	✓	✓	✓
Social Media	✓	✓	✓

poppy micro chip (April to check which one she wants)
1 Status: In review

Price out AC units
1 Status: In review

Revamp Etsy listing
1 Status: In review

All 3 boys bus passes
4 Status: In progress

Print out mailing labels for every in follow up bus by category
13 2 Status: In progress

Order business credit reports
10 Status: In progress

Check all Trello boards and skyslope
2 Status: Done

Social Media
Status: Done

+ Add a card

Tuesday/Wednesday: Off except socials

Social media
Status: To do

+ Add a card

Thursday: Follow up/Calls/All else

Social Media
Status: To do

Mercury card dispute
1 15 Status: In progress

Ice maker isn't working again
2 Status: In progress

CJ Bus Pass
Status: To do

Reserve RV for Brothers wedding
Status: To do

+ Add a card

Friday: Errands

Car wash
Status: To do

Owen Soccer Gear
Status: To do

Cardboard
1 Status: Done

Social Media
Status: Done

Pool Chemicals
Status: To do

+ Add a card

Saturday: Grocery Day

Groceries put away
Status: Done

Meal Plan- leave recipes in here so I can reuse them
42 Status: Done

Grocery shop non-Costco
6 92/92 Status: Done

Grocery Shop Costco
26/26 Status: To do

+ Add a card

Sunday: Meal Prep

Meal prep
5 Status: Done

+ Add a card

Personal Assistant



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Do/Doing/Done Boards



A list	Buyer/Seller	Selling Price	Source			
		\$2,000,000.00	PreListing/Buyers	Notes		
Burnfield				On the Market 4/1		
Dallimore	Seller	\$650,000.00	Flipper / Investors	coming soon		
Dave Smith	FB Buyer	\$500,000.00	Meadow Vista			
Jordan Ohara				Waiting for credit to go up		
Bill Van Ness						
Scott Gardener			Kaylie referral	Call 3/15		
Anthony Skoblar	10079 Celio Rd., NC		Shane Swanberg	Has contractors working on getting it ready. Call back in one month.		
Lauren Keown Beyer	Buyer	\$850,000.00		Looking in folsom 2 bed 2 bath fixer		
Steven						
Kristi Jones				appt 3/5		
Michelle Roach						
Macie Rumsey						
Isaiah Blackmun						
Brandon & Jennifer Trimmer				\$900,000 MV, useable land, turnkey		
Stephanie Kramer						
Cathy Jones						
Tom Bartol	seller			Rental Property: 9840 Joeger Rd. Looking to sell in the next couple of months		
B list clients	Buyer/Seller	Selling Price	Source			
		\$1,750,000.00	Lost Listings/Buyers			
Tom Zumalt	Buyer/loan	\$450,000.00	wants payment of \$2k in meadow vista			
Christine Hoffer			Rollins Lake property-Upnest-Left off with Darius			
			IG buyer Loomis, Lincoln, Auburn, poss Roseville, no Rockln. Payment=doesn't know, less than \$2500/mo. Needs to stay close to parents, OK with fixer. Sept/Oct start looking.	Called 2/21		
David and Katie Lewis	Buyer/Loan	\$450,000.00	Walk-in/ Meadow Vista area			
Jim Hayes	Buyer	\$450,000.00	saving, Meadow Vista, Colfax, Auburn			
Kaili Belardi	Buyer	\$350,000.00				
Laura Hill						
Kim from IG	refi	\$0.00	Waiting for rates to go down			
Lisa Tamang		\$0.00				
Steven	Buy	\$50,000.00	Land in placer county			
Chris Ciampa	Buy	\$0.00	Multi-fam/SFR open to rehab-investor off-market only			
Stephanie and Michael	Loan	\$500,000.00	Chicago park buyers, saving for down payment and renting for awhile			
Tyenne	Loan/ Buy		Working on credit repair			
Brandi Ohara	Buy/Loan	\$0.00				
Amanda Tapscott	Buy/Loan	\$650,000.00	Need to file 2023 taxes			
Patrick Cole						
Jace Willis is Meliane?						
Michelle and Russell Cleland						
Gary Howard			Looking for multi fam home			
Geoff Goolsby			Lead: Michelle Roach			
Chizoma	sell					
Robert/ Andy Cave	loan					
Tim Wetherford						
Susan Beeby	Buy/Loan? Wants \$537K		Fefferal from TF			

Production Sheet

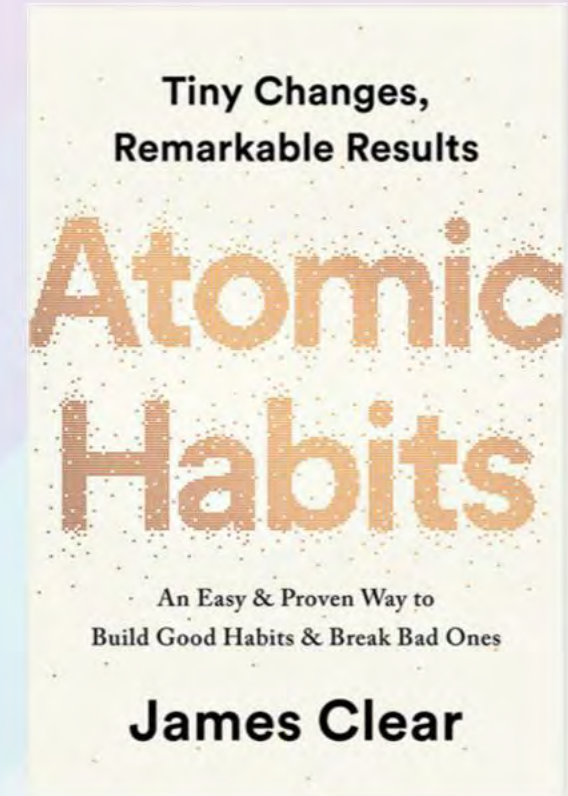
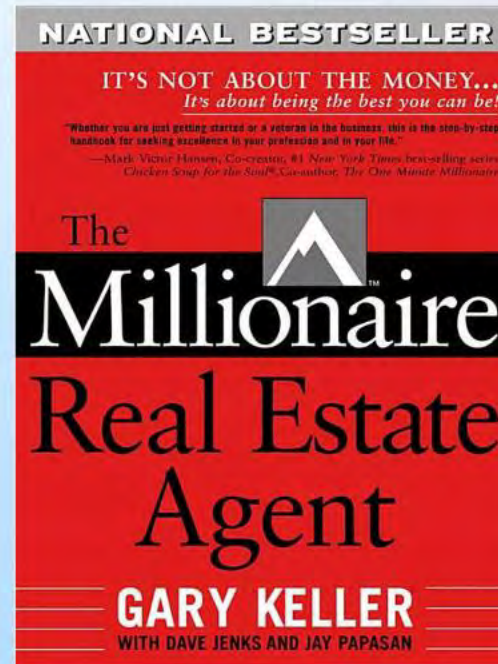
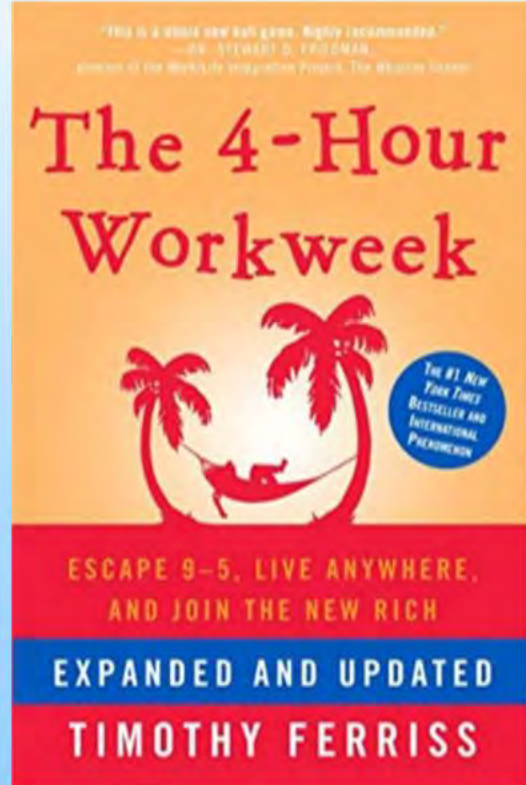


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Recommended Reading



Tom Ferry Coaching






April Noessel



TOMX

Kole **BARTOS**

Shifting Gears: From Only Buyers to a Listing Powerhouse

 Marco Island, FL
 kole@bartosgroup.com
 koled

Homes sold: **39**

GCI: **\$1,074,989**

Volume: **\$44,139,667**



Shifting Gears

From Only Buyers to a Listing Powerhouse



Kole Bartos

@koledb

- X 7 Years in Real Estate in Southwest Florida
- X 2023 Volume: \$64M+ Pending and Closed
- X YTD Listings Taken: 45 Listings





Back in 2017

At 18 years old, I officially got my license.

Would you hire this guy as your agent?

So How Can You Do It?

- Change Your Mindset
- Become Proactive
- Master Lead Sources
- Position to Win

Change Your Mindset

**You are your own biggest fan
AND your worst enemy.**

Agents stop themselves from making calls either because they are afraid to, feel they need to over-prepare, or just flat out don't want to.



Become Proactive

A buyer's agent is reactive. A listing agent is proactive.

Becoming proactive involves:

- Roleplaying every day and learning to move past objections
- Making calls every day
- Triple dialing

Mastering Lead Sources

You Don't Have to Buy Leads to Be a Listing Agent

Top Listing Agent Lead Sources:

- Call-Arounds / Expired Listings
- Retargeting Database
- Listing Launch
- Multiplier Effect



Position to Win

Setting the Appointment is Only Step One

Top Listing Agent Strategy:

- Video Email with Key Information
- Be the Knowledge Broker
- Know Your Client
- Ask What is Most Important
- Follow Up



So How Can You Do It?

- Change Your Mindset
- Become Proactive
- Master Lead Sources
- Position to Win

Align with your customers.
Give them options.
Be their advisor.

**“You are the average
of the five people
you spend the most
time with.”**

Jim Rohn



Kole Bartos & The Bartos Group




TOMX

Jenny SMITH

Optimizing Instagram for Lead Generation

 Cantersville, GA

 jenny@jsateam.com

 the_real_jenny_smith

Homes sold: **58**

GCI: **\$506,880**

Volume: **17.6M**





Optimizing Instagram for Lead Generation

Small Market / Big Goals

Jenny Smith

**No market is
too small for
BIG results.**

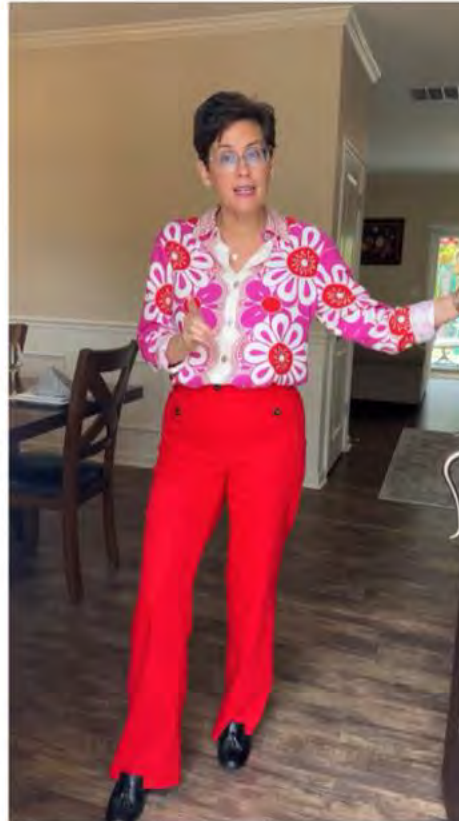
Cartersville, GA

Year To Date:
24 Buy Side
34 List Side

Total: **58**
On Track: **120**

If they see our videos..

- 95% instant credibility.
- A competitive listing by the time we get there.

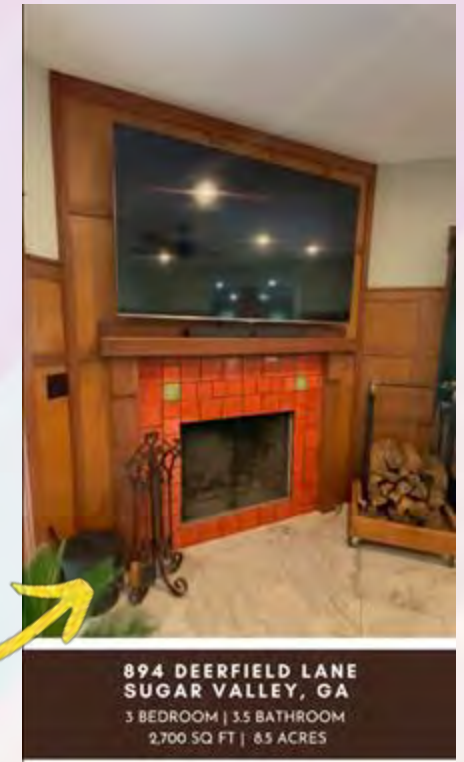


-  **JoLyn Payton** > Renee Shoults
Here is one of our home tour videos 📌
<https://www.instagram.com/reel/C6M9GUUKbp6/>
-  **JoLyn Payton** > Renee Shoults
Hi Linda! I just emailed over our pre-listing guide for you to look over before your appointment with Jenny for tonight at 6pm. Please let us know if you have any questions. Thank you!

We know why agents get fired...

Sellers always blame the agent for not marketing enough.

We have solved it.



Are You Ready For The Secret Sauce?

Batch Film Your Listings

Step 1

Plan.



Step 2

Video shoot at the house with the team – typically 2.5 hrs.



Step 3

Create a 90-day video marketing plan. Our goal is 9 videos giving us content every 8 days for the 12 weeks.



90-Day Marketing Plan

This “Secret Sauce” brings in two types of clients:

Client 1:

“We are firing our agent to hire you!”



Sold **6** of these homes this year.

Client 2:

“We are calling because we see your videos.”



Sold **22** of these homes this year.

PS... Our videos bring in buyers too.

What should I film?



Nature



Kitchen



Best Features

1 Just listed + 8 other videos





Jenny Smith



JENNY@JSATEAM.COM



JENNYSMITHANDASSOCIATES.COM



THE_REAL_JENNY_SMITH



WWW.FACEBOOK.COM/JENNYSMITHANDASSOCIATES



678-431-0731



KELLER WILLIAMS NORTHWEST
22 FELTON PLACE
CARTERSVILLE, GA 30120

Let's connect! Scan here



Jenny Smith
AND
ASSOCIATES

The Real Estate Team For You!

TOMX

Kaleb **MONROE**

Mastering the Art of the 10-minute Buyer Consult



Houston, TX



kaleb@thekmteam.com



kalebrmonroe

Homes sold: **86**

GCI: **\$591,115**

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



Who Is This Kid?

- 23 y/o in Houston, TX
- \$90M+ in Career Sales – Lic. Since 2020
- Serial Real Estate Investor
- Leader & Owner of The Monroe Team
- Viciously Aspirational



Mastering the Art of the 10-Minute Buyer Consult

**People don't care how much
you know until they know
how much you care.**

The First Contact

Very First Conversation - BEFORE The Consultation

- **Be Fearless**

- This initial call is to dig deep into the wants/needs of our client.
- There is also no question we leave unasked.
 - "How much money do you make?"
 - "How much do you have saved?"
 - "Where is your credit score hovering?"

Set the Tone for the Relationship

- **You are the professional.**
 - Drive conversations to a positive outcome.
 - Not only for you, but more importantly, the client.
 - **The person who asks the questions, controls the conversation.**
- **Always ask 3 questions deep.**
 - Rapport Building on Steroids
 - "How is your day going?"
 - "Great! What has been the highlight of it?"
 - Take it one question further based on response.

Your 10 Minutes of Fame

THIS is Your Time to SHINE

You have built rapport. This part should feel like catching up with an old friend. Here are the KEY POINTS to hit:

1. You and your UVP
2. CliffsNotes version of yesterday's and today's market
3. NUMBERS, NUMBERS, NUMBERS
4. Marriage agreement

You and Your UVP

What is your unique value proposition?
This section of your appointment should be brief — but make a *big* impact.

First impressions are everything and can either make or break the trust someone has with you.

What can you guarantee to your client without fail? In a world where nothing is really new, we must know how to present ourselves in the best way.



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CLIENT STANDARDS

Transparency

We are straight up as an agent, we will be able to give you our professional insight with no sugar-coating. What type of feedback we're receiving, what type of traffic we're getting, etc. Most of all, calling the people who have shown the house and getting concrete responses.



Availability

All of our sellers get a touch every Tuesday with an update. Between that, we are constantly talking to our clients and sellers. It will be as if the feedback we are receiving is being presented to both of us with how efficiently it's presented.



Upon meeting,
we will explain
these points
further.

Hear What Our Clients Have to Say

Joe Kyoung Lim

★★★★★

Excellent, Professional, and Strategic Real Estate Consulting Team!! They are very focused on client favor and interest. Kaleb always has been so kind and thoughtful of any question and has done his best for any kind of situation on processing. Kaleb and his team are mostly the best realtor team I've ever met.

Eduardo Lozano

★★★★★

Kaleb Monroe was very professional from the very first call, message, and tour when viewing houses till today on closing day! Always answered every single question, with great responses and showed professionalism! I would recommend working with Kaleb 100%! Everything was punctual and on time!

Visit our Google page for more client reviews

Yesterday and Today

- X 76% of Americans say today is a bad time to buy a home... So the 24% of folks shopping are either not watching the news or don't care about rates.
- X We know, you don't know where rates are going. But giving a CliffsNotes version of the last couple years gives more context on today.
- X Explain & show proof about your clients WINNING in today's market and why!
- X Showing real results of what it is like in a working relationship with you during the conception of that relationship gives you influence and undeniable trust.



\$ 100K

Paid @ Closing

FHA: 3.5% = \$3500

C.C.: 3.5% = \$5000

Cash
To
close = \$8,500

- 2,000 (\$)

6,500

- 1,000 (negotiation)

5,500

Paid Along The Way

EM: \$1,000

OF: \$250-500

* Inspection: 300-600

Appraisal: 500-1K

Plumbing

Roof

Electrical

A

C

Heat

The Numbers

Provide value by explaining:

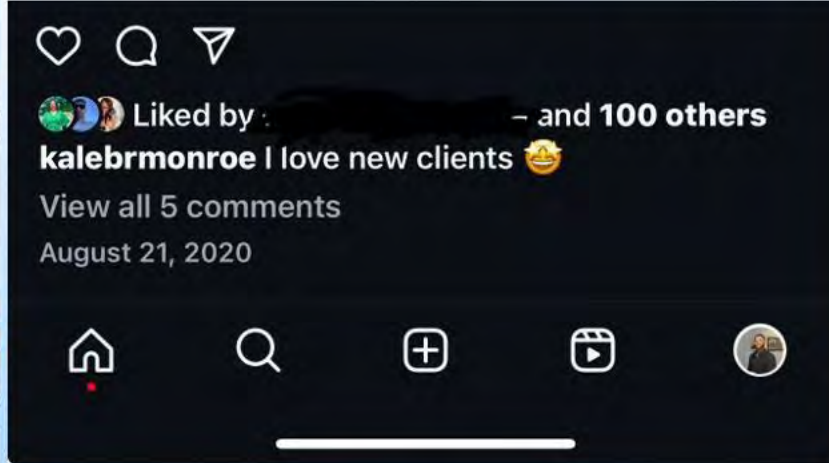
- Earnest Money
- Option/Contingency Fees
- Inspection & Appraisal Costs
- Down Payment
- Closing Costs

"The numbers" doesn't have to be monthly payments, but giving value on the funds it costs them along the way breaks a barrier in you & the client's relationship.

Preface that these numbers are super rough estimates and a placeholder so they know what to expect as we go.



SUCCESS SUMMIT



Buyer Representation

Whether a NAR settlement was reached or not.

You should have been getting a representation agreement signed.

On top of that, we certainly should not have been scared to present it.

- You are a professional
- Professionals have agreements
- It helps establish clear expectations
- Makes you married

Connect with Me!

Instagram



Contact Info



TOMX

Tina TAN

Secrets of a Million Dollar Marketing Team



Irvine, CA



tinatan@tinatangroup.com



tinasellsoc

Homes sold: **12**

GCI: **\$609,850**

Volume: **21M**



SUCCESS SUMMIT

Tina Tan

Secrets of a Million Dollar Marketer



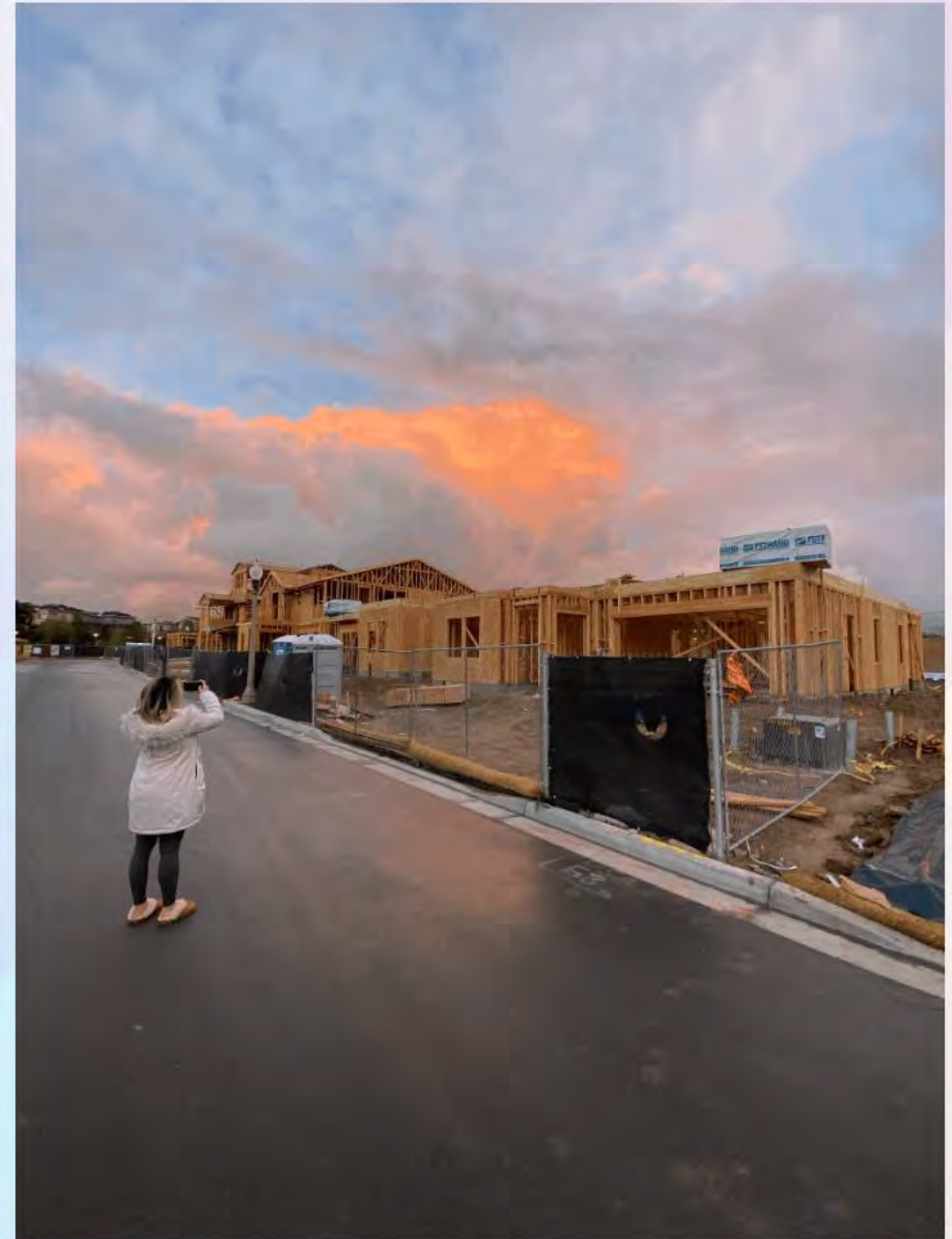


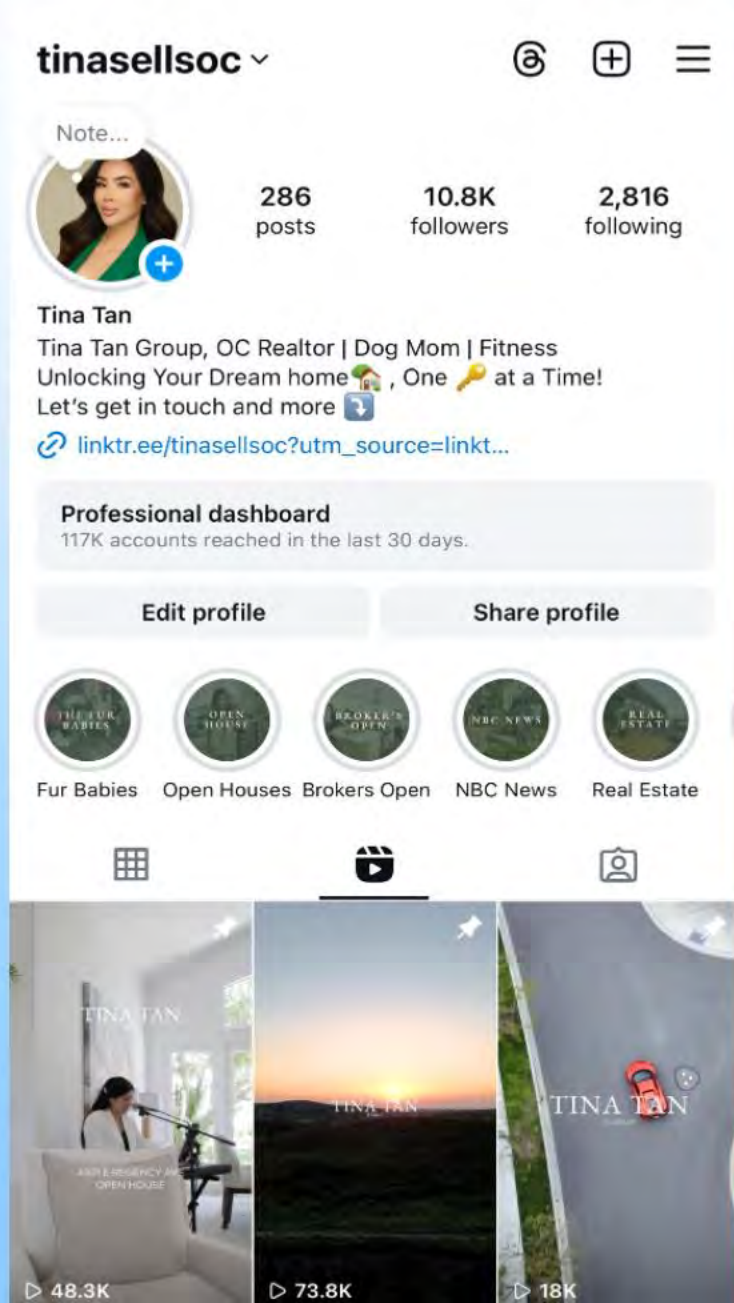
About Me

- Year 1: \$25k GCI
- Year 3: \$590k GCI
- On track for \$1M by year-end

My Journey

- Came to real estate from a sales background.
- My motivation stemmed from my own challenging first-time home buying experience in 2021.
- June 2022, I got my license.
- Hosted open houses for other agents.
- Only a handful of guests would walk in.
- Which led me to start questioning, "WHY?"





Secret #1: Leverage Social Media

Use social media to build awareness and hype.

In 2021, I had only 4000 followers and I wanted to let everyone know I was going to start a new career.

Example: Record other agents' open houses and model homes with my iPhone. I would post stories everyday.

Social Media Strategy



Create Hype videos for “Coming Soon”



Marketing Strategy

- X Start early: Build awareness 2-3 weeks in advance
- X Document and share open house highlights

TINA TAN GROUP 31 HELIOTROPE




FOR PROFESSIONAL GUIDANCE, EXCEPTIONAL SERVICE, AND RELIABLE OUTCOMES, CONTACT THE TINA TAN GROUP!

TINA TAN
GROUP

Your Most Important Investment Deserves Top-Tier Representation

TINA TAN GROUP 31 HELIOTROPE





31 HELIOTROPE | LAKE FOREST
OFFERED AT \$2,695,000

5 🚗 | 4.5 🛁 | 3,078 SQ FT 🏠 | 5,068 SQ FT LOT

Welcome to 31 Heliotrope in the prestigious Baker Ranch Community. This luxurious 5-bedroom, 4.5-bath home features an open floorplan, new renovations, a pool, jacuzzi, and stunning hill views. Enjoy community parks, playgrounds, tennis courts, and a main floor ensuite bedroom plus a master suite with a private balcony.

- Backyard by Paradise Designs
- Interior design by 27 Diamonds
- Oakwood floors
- Primary suite retreat
- Turn-key
- Downstairs guest suite
- Smart home
- Salt water & Heated pool
- Jacuzzi
- No Mello-Roos

TINA TAN
949 - 877 - 6693
TinaTan@tinatangroup.com
@tinatansoc



OPEN HOUSE

Saturday:	Sunday:
6/8	6/9
12:00 - 4:30pm	12:00 - 4:30pm

Live Music
Mini Pancakes
Hot coffee



Secret #2: Create Exceptional Experiences

OVERDELIVER to create exceptional experiences.

Example: \$15k investment in marketing for my very first listing.

Event planner, caterers, musicians, bartender, and videographer.

Exceptional Marketing Tactics

- ✕ Event planner, live music, catering, video production
- ✕ Branding: Flyers, signs, and branded materials



Results from Overdelivering

- 50+ brokers at my first broker's open
- 200+ guests in 2 days
- Record sale price
- 10 days on market
- Increased IG following
- New leads from neighborhood
- My very first farm!

Secret #3: Become a Recognizable Brand

Consistency in quality builds a powerful brand.

Repeated success through memorable events, social media, and news coverage.



Building Your Brand

- x Consistent quality across all interactions
- x Showcase skills and talents repeatedly
- x I wanted to be known as the agent that throws awesome events and breaks records



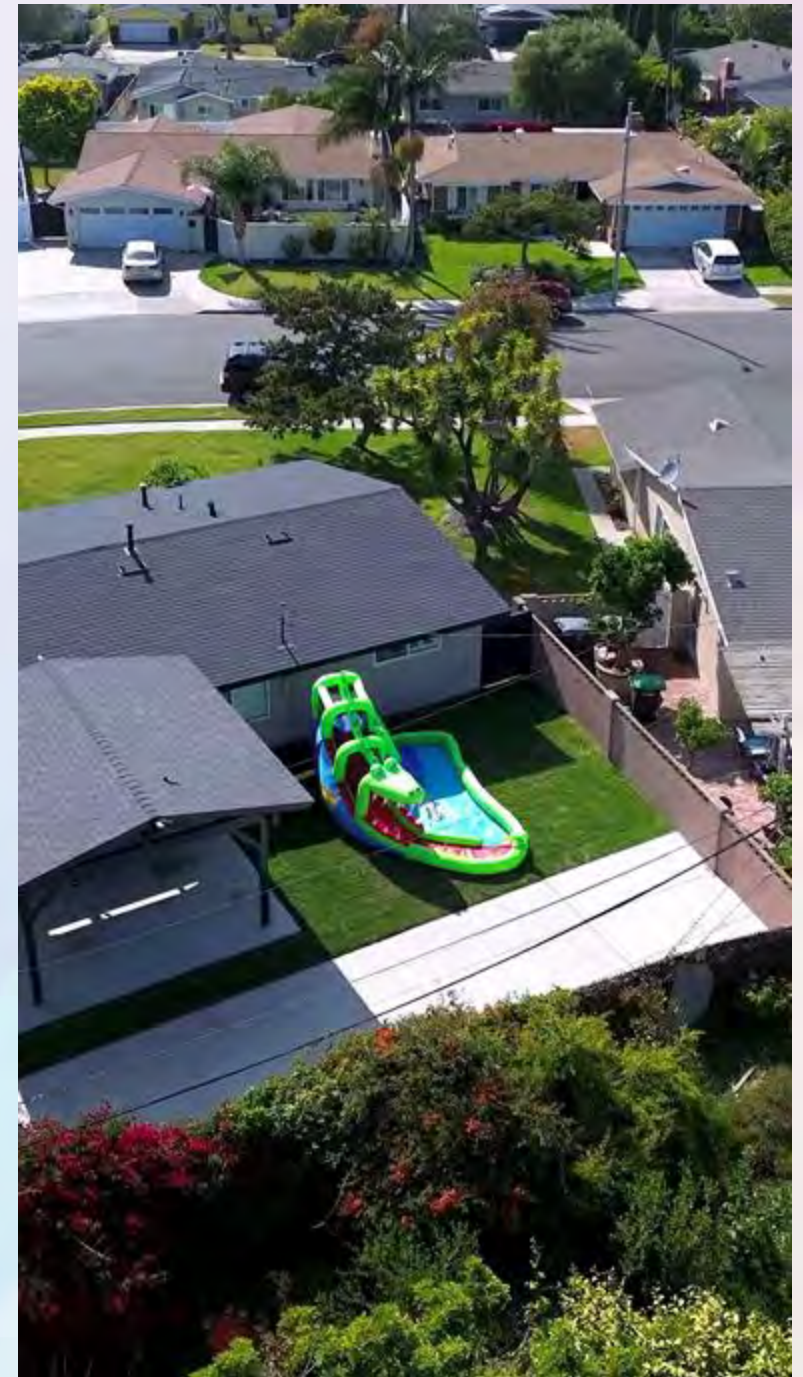
Fast Forward to Today

- x Branded goodies
- x Live entertainment and catered events
- x Over 100 brokers attend each broker's open
- x Over 500 guests in the 1st weekend of each open house



Creating Unforgettable Moments

- x Core memory closing day
- x Personalized gifts for all my clients



Key Takeaways

- ✕ Use social media to build hype
- ✕ Create exceptional experiences that people want to talk about.
- ✕ Become a recognizable brand



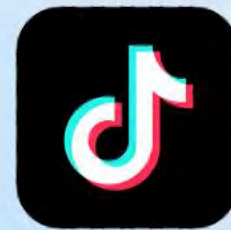
“Fortune favors the brave.”

Matt Damon

Let's Connect!



@TINASELLSOC




TOMX

Jurnee **GILLETTE**

Coordinator to Team Leader: Fast-Track to Success

 Clarksville, TN

 jurnee@jurneehometeam.com

 [jurneehometeam](#)

Homes sold: **45**

GCI: **\$361,340**

Volume: **\$13,145,750**



From Coordinator to Team Leader: Fast-Track to Success

Jurnee Gillette



Jurnee Through Time

- 2017: Started as a TC.
- Dec 2019: Became a licensed agent.
- 2020: Sold 30 homes, top 10% in my market.
- 2022: Started Jurnee Home Team.
- 2023: Broker of Benchmark Realty.



Build Your Support System

Choose people who inspire and uplift you.

- My husband
- My family and friends
- My coach
- Tom Ferry ecosystem
- Brokerage with exceptional leadership

Master Your Calendar, Master Your Success

- Timeblock your ENTIRE day.
- Commit to business-generating tasks.
- Show up consistently.
- Prioritize hard work

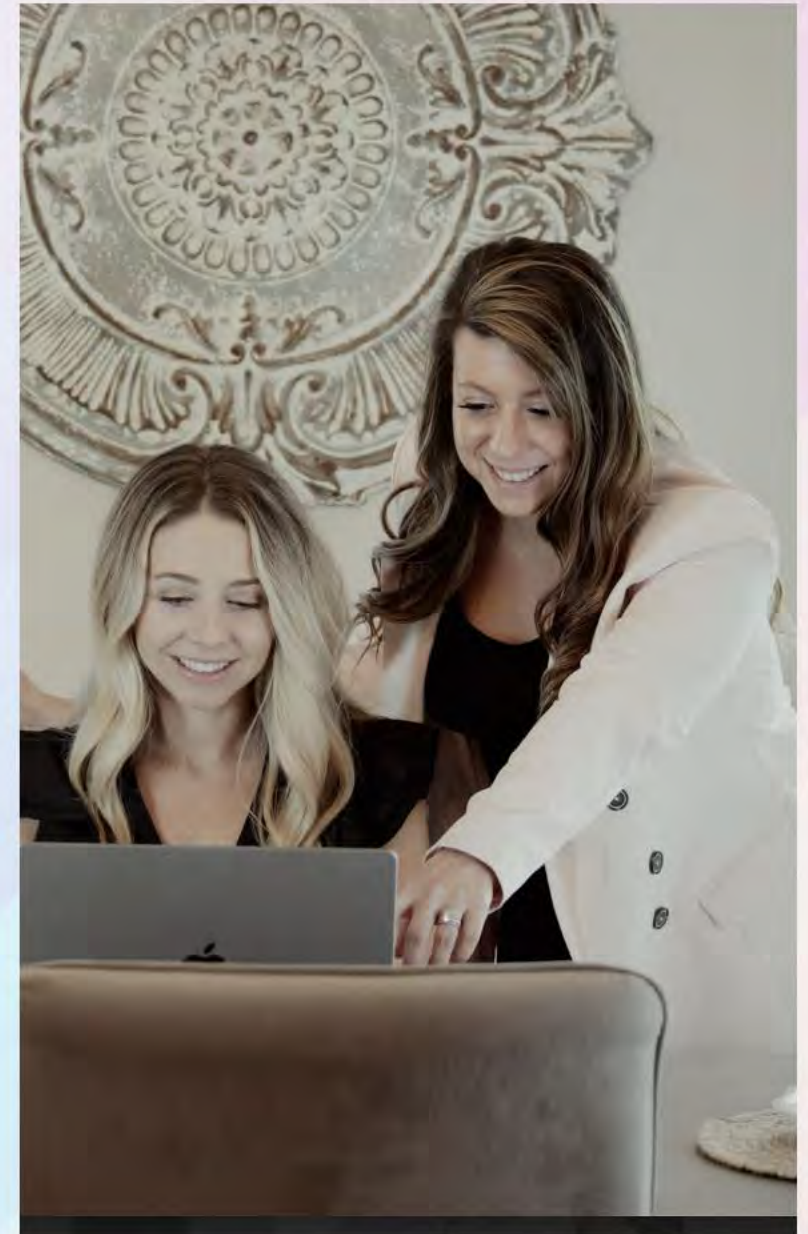
MON 26	TUE 27	WED 28	THU 29	FRI 30	SAT 31
Wake Up & Exercise 4 – 5am	Wake Up & Exercise 4 – 5am	Wake Up & Exercise 4 – 5am	Wake Up & Exercise 4 – 5am	Wake Up & Exercise 4 – 5am	
Journal & Meditate 5 – 6am	Journal & Meditate 5 – 6am	Journal & Meditate 5 – 6am	Journal & Meditate 5 – 6am	Journal & Meditate 5 – 6am	
Breakfast with Family 6 – 7am	Breakfast with Family 6 – 7am	Breakfast with Family 6 – 7am	Breakfast with Family 6 – 7am	Breakfast with Family 6 – 7am	
Market Update, 7am Team Meeting, 7:30am	Market Update, 7am Team Meeting, 7:30am	Market Update, 7am Team Meeting, 7:30am	Market Update, 7am Team Meeting, 7:30am	Market Update, 7am Team Meeting, 7:30am	
Roleplay 7:45 – 8:30am	Roleplay 7:45 – 8:30am	Roleplay 7:45 – 8:30am	Roleplay 7:45 – 8:30am	Roleplay 7:45 – 8:30am	Prep For Open House 8 – 10am
Hour of Power 8:30 – 9:30am	Hour of Power 8:30 – 9:30am	Hour of Power 8:30 – 9:30am	Hour of Power 8:30 – 9:30am	Hour of Power 8:30 – 9:30am	
Client Follow Up 9:30 – 10:30am	Client Follow Up 9:30 – 10:30am	Client Follow Up 9:30 – 10:30am	Client Follow Up 9:30 – 10:30am	Client Follow Up 9:30 – 10:30am	
CRM Upkeep, 10:30am	CRM Upkeep, 10:30am	CRM Upkeep, 10:30am	CRM Upkeep, 10:30am	CRM Upkeep, 10:30am	Open House 10am – 4pm
Social Media Lead Gen 11am – 12pm	Social Media Lead Gen 11am – 12pm	Social Media Lead Gen 11am – 12pm	Social Media Lead Gen 11am – 12pm	Social Media Lead Gen 11am – 12pm	
Lunch with Client 12 – 1pm	Lunch with Client 12 – 1pm	Lunch with Client 12 – 1pm	Lunch with Client 12 – 1pm	Lunch with Client 12 – 1pm	
CMA Drop 1 – 2pm	Appointments 1 – 2pm	Appointments 1 – 2pm	Appointments 1 – 2pm	Door Knock Open House 1 – 2pm	
CEO Time 2 – 3pm	CEO Time 2 – 3pm	CEO Time 2 – 3pm	CEO Time 2 – 3pm	CEO Time 2 – 3pm	
Appointments/Lead Gen 3 – 6pm	Appointments/Lead Gen 3 – 6pm	Appointments/Lead Gen 3 – 6pm	Appointments/Lead Gen 3 – 6pm	Appointments/Lead Gen 3 – 6pm	

Nail Down Your S.O.P.s

- x Build Systems and Processes Early**
 - Tasks performed consistently and to high standards help maintain the quality of service provided to clients.
- x Scalability**
 - As business grows, processes are already documented and can be replicated by new hires.
- x Win Client Trust and Loyalty**
 - Consistent and high-quality service builds client trust and satisfaction, leading to repeat business and referrals.

Educate the Consumer

- x Be the Knowledge Broker**
 - Share insights on social media.
 - Create video guides for your clients.
- x Master the Forms and Legalities**
 - Have a thorough understanding of all the necessary documents and their legal implications in real estate transactions.
- x Make Education a Key Part of Your Value Proposition**
 - People want to know that you are always learning more about the industry so you can serve them better.



Be Consistent

- ✕ Strive to maintain consistency across all tasks.
- ✕ Relentlessly work your lead pillars.
- ✕ Stay committed despite delayed results.
- ✕ Target your ideal client on social media.



Listen to Your Coach

- ✕ Do the homework and implement your coach's advice.
- ✕ Embrace the hustle; trust the process.



Focus on Relationships

- x Deliver Exceptional Customer Service to Buyers and Sellers**
 - Be the agent they will refer to their friends, family, and colleagues.
- x Strive for the 5-star Google Review**
 - Rank higher when consumers are doing their research.
- x Partner with Vendors Who Align with Your Values**
 - You are who you surround yourself with. Find vendors who work as hard as you do.
- x Love On Your Community**
 - Local business spotlights on The American Dream.

Don't Compromise Quality Over Quantity



- ✕ Select team members who share your core values.
- ✕ Protect your reputation.
- ✕ Avoid hiring "energy sucking vampires."
- ✕ Nurture those who contribute to your vision.

Always Be Growing

- ✕ **Draw Inspiration from Successful Individuals**
 - Follow successful people
- ✕ **Tap into the Tom Ferry Community for Motivation**
 - Contribute to the ecosystem
 - R&D
- ✕ **Align with a Brokerage That Has Strong Leadership.**
 - Guidance, mentorship, and support are crucial.
- ✕ **Leverage Relationships to Unlock Big Opportunities**
 - Choose people who will say your name in a room full of opportunities.

Your Keys To Success

1. Build Your Support System
2. Master your Calendar
3. Nail Down Your S.O.P.s
4. Educate the Consumer
5. Be Consistent
6. Listen to Your Coach
7. Focus on Relationships
8. Choose Quality Over Quantity
9. Always Be Growing

LET'S CONNECT



[INSTAGRAM.COM/JURNEEHOMETEAM](https://www.instagram.com/jurneehometeam)



[FACEBOOK.COM/JURNEEHOMETEAM19](https://www.facebook.com/jurneehometeam19)



[YOUTUBE.COM/@JURNEEHOMETEAM](https://www.youtube.com/@jurneehometeam)

TOMX

D.J. & Lindsey **DELLASALA**

Longer Sale Cycles Got You Down:
Here's the Solution!

📍 St. Augustine, FL

✉️ dj@moveto904.com

📷 lindsey@moveto904.com

Homes sold: **779**

GCI: **\$9,371,200**

Volume: **\$331,802,625**



From Click to Close:

Mastering the Art of Long-Term Lead Nurturing



DJ and Lindsey

PREMIER AGENT™ ⓘ

(They/Them/Theirs)

DJ & Lindsey Real Estate

Lead of DJ & Lindsey Real Estate

5.0 ★ 1,936 team reviews

2024 Closed Units: 779 YTD

2024 Closed GCI: \$9,371,200 YTD

2024 Closed Volume: \$331,802,625



Why Agents Fail:

- **Giving Up Too Soon**
- **Lack of a Follow-Up Plan**
- **Over-Reliance on Automation**
- **Inconsistent Communication**
- **Not Adjusting the Approach**
- **Failing to Provide Value**
- **Ignoring Lead Behavior**

Did you know that **80%** of sales are made on the 5th to 12th contact...

...but **48%** (nearly HALF) of salespeople never follow up after the first contact?

**According to the National Association of Realtors,
the average conversion rate for internet leads is
less than 1% .**

**However, agents who implement a robust long-
term follow-up strategy can see their conversion
rates increase to
5-10% or EVEN HIGHER.**

Currently Under Contract

162 UNITS

... HOW “HOT” WERE THEY?

LAST 30 DAYS

4%

1-3 MONTHS

17%

3-6 MONTHS

25%

6-12 MONTHS

32%

12+ MONTHS

22%

2021: HOW HOT WERE THEY?

LAST 30 DAYS

8%

1-3 MONTHS

27%

3-6 MONTHS

33%


6-12 MONTHS




22%



12 + MONTHS








10%


Lexi's Case Study: Lead Came in **9/2021** !

Michael Cozart  [Search for social profiles](#)

MC   (276) 608-  mcozart@

  (276) 356- [Show more](#)

B  **Sale Closed**   106  33  135  To-Do 0  Note 1

S  **New**

Good convo— looking for condo or townhouse 5-800k— low maitnance- cash buyer. will be a vacation home for his family. from out of state. Sunset Harbor is mainly where he's looking b/c it has a marina, open to Palm Coast too! Has a friend down there, will come into town if they see the perfect place

Michael

[+ Add Tag](#)

LEAD ACTIVITY

Web Activity:	\$695K	637	801	22
		visits	properties	favorites
Registered:	Sep 8, 2021 (3 years ago)			
Source:	BING for St. Augustine - New			
Last Logged In:	3 months ago (Desktop Site)			
HomeSearchNOW:	Send App Invite 			
	Last Logged In 9 months ago			

Buyer Agent: DJ & Lindsey D [Transfer](#) [Remove](#)

Listing Agent: Lexi Psihogios [Transfer](#) [Remove](#)

Lender: Sponsored Lender [Transfer](#)

Opp Wall: Buyer Agent: [Included](#) | [Exclude](#)


Listing Agent: [Included](#) | [Exclude](#)

Address: [Add](#)

Birthday: [Add](#)

Close Date: **April 25, 2024** [Edit](#) [Remove](#)

TRANSACTIONS [+ Add New](#)

	150 Pantano Cay Blvd Unit#2302 St. Augustine, FL 32080	\$545,000 Closed
---	--	----------------------------






[Edit Transaction](#)

[Expand](#)

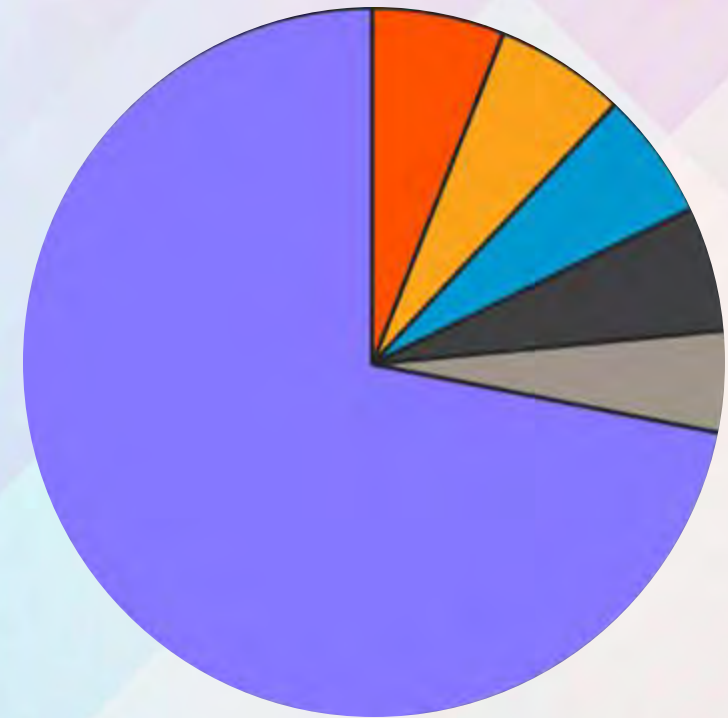
\$16k GCI

Lexi's Case Study: 2024 Closed GCI

AGENT: CLOSED GCI (YTD) LEADERBOARD

1		Lexi Psihogios	\$449,508.55	Volume	6.02%	of Total
2		Lawrence Cipollone	\$444,373.84	Volume	5.95%	of Total
3		Scott Dustin	\$435,069.90	Volume	5.83%	of Total
4		Caitlin Daugherty	\$424,844.84	Volume	5.69%	of Total
5		Markus Brown	\$345,695.31	Volume	4.63%	of Total

CLOSED (YTD)



Lexi's Case Study: Conversations and DIALS

AGENT: CONVERSATIONS (YTD) LEADERBOARD

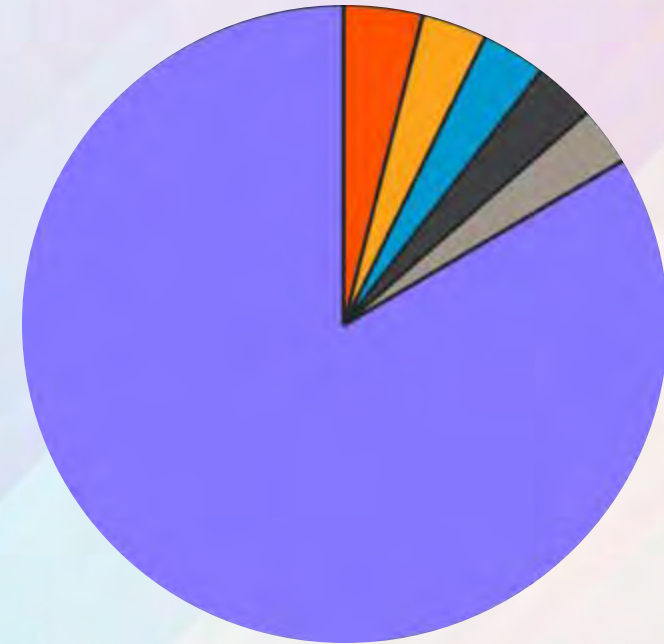
1		Jessica Wiebenga	4824	Count	3.89%	of Total
2		Michelle High	4000	Count	3.23%	of Total
3		Lexi Psihogios	3966	Count	3.2%	of Total
4		Michelia Grayson	3789	Count	3.06%	of Total
5		Drew Kazemba	3696	Count	2.98%	of Total
		Other	103659	Count	83.64%	of Total



Lexi Psihogios

6153

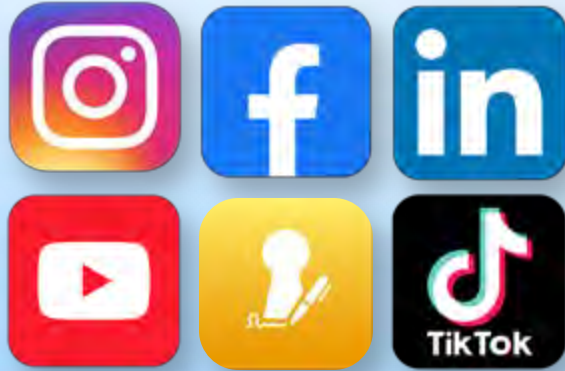
CONVERSATIONS (YTD)



Total activity: 123934

FOLLOW US!

@DJANDLINDSEY



Sign to **SHOW**

"ONE-CLICK" SHOWING AGREEMENTS



DJ&LINDSEY
REAL ESTATE

Leading
REAL ESTATE COMPANIES
IN THE WORLD

WE'RE LOCAL
WE'RE GLOBAL®

TOMX

Gino BLEFARI

Start Strong: The Ultimate Morning Routine for Success



Irvine, CA



ginoblefari@homeservices.com



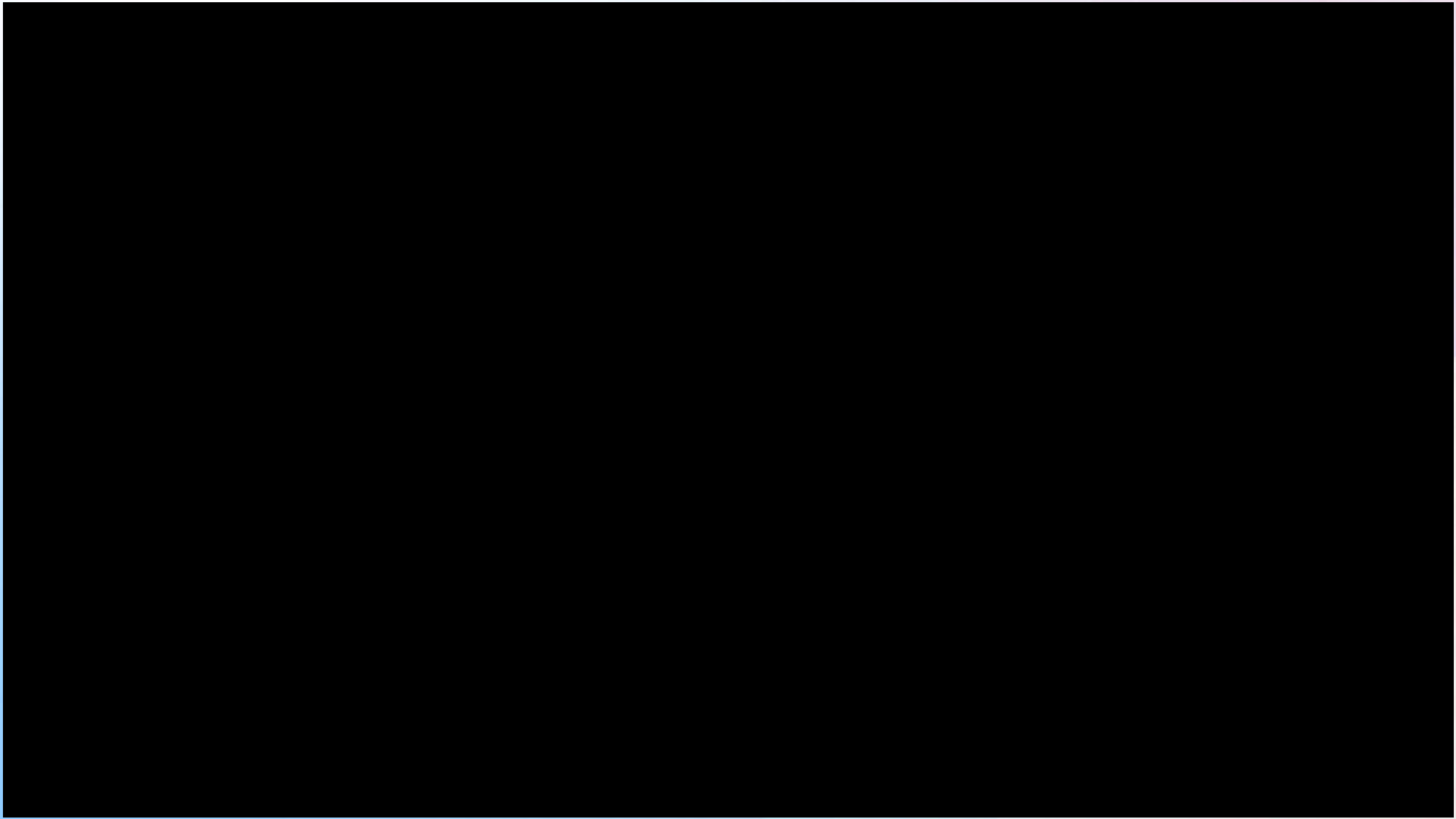
ginoblefari



ROUTINE



SUCCESS SUMMIT



KEYSTONE HABITS

M.E.D.S.

MEDITATION

EXERCISE



DIET



SLEEP



SUCCESS SUMMIT

MY MORNING ROUTINE





SUCCESS SUMMIT

2024

GENESIS

Continuous Improvement & Growth

Mission:

I am helping people achieve their goals faster than they would in my absence.

Personal Vision

I am an outstanding human being in every respect. I am honest, kind, loving, and loyal and true to myself.



SUCCESS SUMMIT



READ EVERYDAY

IF By Rudyard Kipling

If you can keep your head when all about you
Are losing theirs and blaming it on you;
If you can trust yourself when all men doubt you,
And make allowance for their doubting, too;
If you can wait and not be tired of waiting
Or being lied about, don't deal in lies;
Or, being hated, don't give way to hating;
And yet don't look too good, nor talk too wise;
If you can dream, and not make dreams your master;
If you can think, and not make thoughts your aim;
If you can meet with Triumph and Disaster,
And treat those two imposters just the same;
If you can bear to hear the truth you've spoken
Twisted by knaves to make a trap for fools,
Or watch the things you gave your life to, broken,
And stoop, and build them up with worn-out tools;

READ EVERYDAY

The Seeds of Success **By Og Mandino**

God, I thank you for this day.

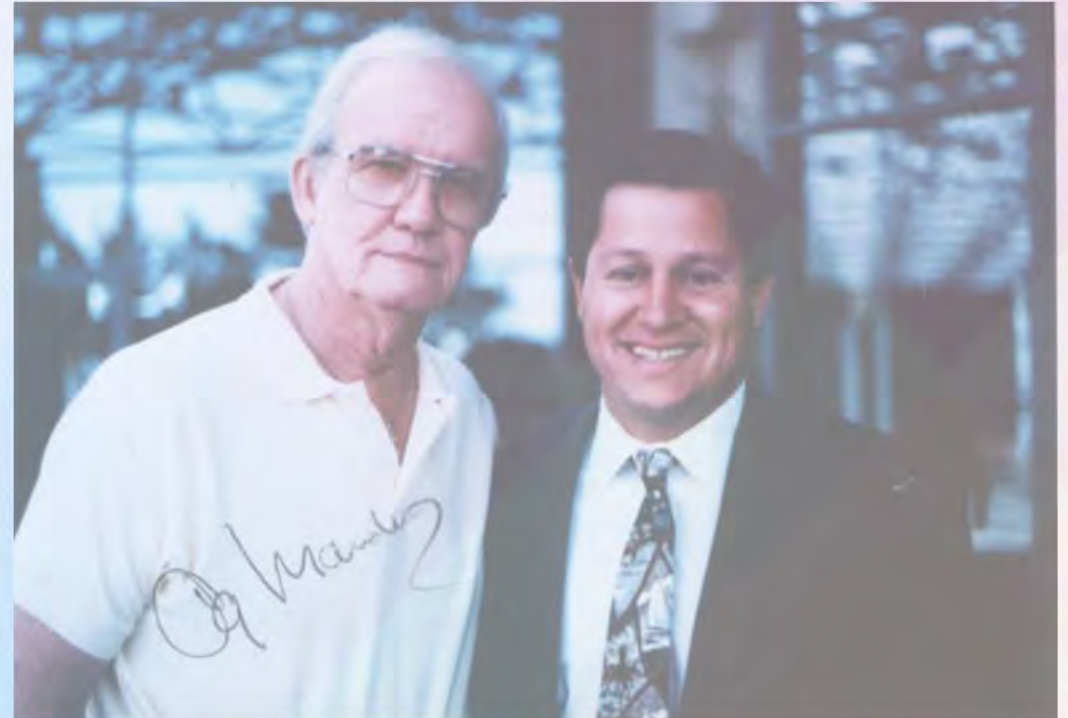
I know I haven't accomplished as yet all you expect of me, and if that is your reason for bathing me in the fresh dew of another dawn, I am most grateful.

I am prepared, at last, to make you proud of me.

I will forget yesterday, with all its trials and tribulations, aggravations and setbacks, angers and frustrations. The past is already a dream from which I can neither retrieve a single word nor erase any foolish deeds.

I will resolve, however, that if I have injured anyone yesterday through my thoughtlessness, I will not let this day's sun set before I make amends, and nothing I do today will be of greater importance.

I will not fret the future. My success and happiness does not



READ EVERYDAY

Self-Confidence Formula

1. I know that I have the ability to achieve the definite object of my purpose in life; therefore, I demand of myself persistent, continuous action toward its attainment and I here and now promise to render such action.
2. I realize the dominating thought of my mind will eventually reproduce themselves in outward, physical reality; therefore, I will concentrate my thoughts for thirty minutes daily, upon the task of thinking of the person I intend to become, thereby creating in my mind a clear mental picture.
3. I know, through the principle of autosuggestion, any desire that I persistently hold in my mind will eventually seek expression through some practical means of attaining the object back of it; therefore, I will devote ten minutes daily to demanding of myself the development of self-confidence.
4. I have clearly written down a description of my definite chief aim in life, and I will never stop trying, until I shall have developed sufficient self-confidence for its attainment.



A Success Journal

by Gino Blefari



Date _____

I am grateful for...

- | | |
|----------|-----------|
| 1. _____ | 6. _____ |
| 2. _____ | 7. _____ |
| 3. _____ | 8. _____ |
| 4. _____ | 9. _____ |
| 5. _____ | 10. _____ |

3 Things that made me happy in the last 24 hours

1. _____
2. _____
3. _____

I am earning



SUCCESS SUMMIT







MY EVENING ROUTINE



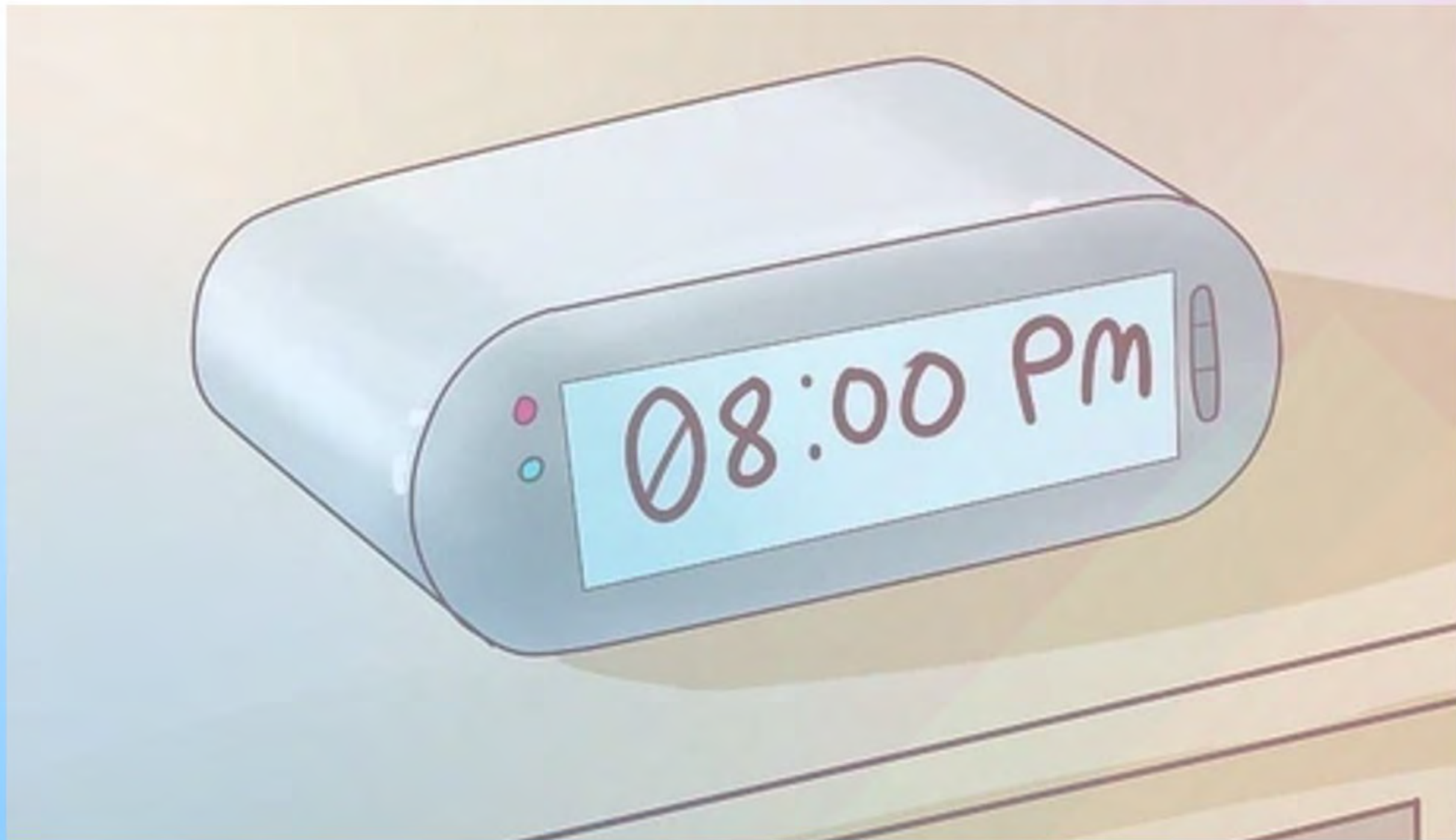


SUCCESS SUMMIT











**WHAT WILL YOUR SUCCESS STORY BE
WHEN WE MEET HERE NEXT YEAR?**





SUCCESS SUMMIT

This information is provided for informational purposes only and does not constitute legal advice. The laws and rules referenced in this presentation may have changed or could be affected by case law at any time without notice. If you have a legal question, you should consult with your attorney.

Real estate agents and brokers should not discuss fees or commissions with other brokers as it is a violation of the Sherman Antitrust Act, which prohibits price-fixing, group boycotting and other antitrust violations.

Who's in --- the Room?

Why Are You Here?

You are here because



CLARITY



SEE FRIENDS



MAKE CONNECTIONS



DIRECTION



GET BETTER



YOU ARE COACHABLE

I believe we're here...

**To Find the
Opportunities!**

I believe we're here...

To Gear Up!

I believe we're here...

**To Welcome
Abundance!**








We've prepared you



2023 CLOSED

COACHING PRODUCT	AVG UNITS	AVG VOLUME
CORE+ Coaching	23	11,633,619
ELITE+ Coaching	32	18,547,915
TEAM+ Coaching	148	85,941,603
TEAM Mastery Coaching	209	121,363,327
TEAM Legacy Coaching	437	278,999,225

First 1/2 - 2024 CLOSED

COACHING PRODUCT	AVG UNITS	AVG VOLUME
CORE+ Coaching	12 	\$6,686,588
ELITE+ Coaching	18 	\$10,823,044
TEAM+ Coaching	90 	\$52,261,385
TEAM Mastery Coaching	197 	\$114,219,383
TEAM Legacy Coaching	432 	\$258,596,252



How are agents
reacting to the changes?



TechCrunch

What's Hot: Android | Apple | Facebook

AI and Auto of the Real

2017



FIRST IN BUSINESS WORLDWIDE.

RT REAL-TIME QUOTES

Symbol / Company

Go

Symbol Looku

HOME

NEWS

MARKETS

EARNINGS

INVE

U.S.

ASIA-PACIFIC

EUROPE

ECONOMY

ENER

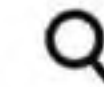
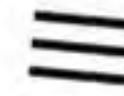


CNBC

ONLINE AND MOBILE AC

The Pandemic Effect: Will the Need for Real Estate

2020



BUSINESS INSIDER

Subscribe

iBuyers and the Future of Real Estate Agents: Are Agents on the Way Out?

2021



SUCCESS SUMMIT

There is no **Growth**



Complaint

Criticism

Comparison

- 
- A man in a dark suit and glasses is standing on a stage, addressing a large, enthusiastic crowd. The audience is filled with people of various ages, many of whom have their hands raised in the air, suggesting a high-energy event. The background is dark, and the lighting is focused on the speaker and the audience.
- **34 years**
 - **2,000 (ish) talks**
 - **2,250,000 (ish) minutes coaching**
 - **2 companies - \$680mil in revenue over 3 decades**
 - **1,700 pitches, 100+ investments, 8 triggers**
 - **2 of the fastest \$0 to \$1mil/ARR SaaS companies in RE**

Business is
Solving Problems

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

Safe to say **YOU**
NEED to take

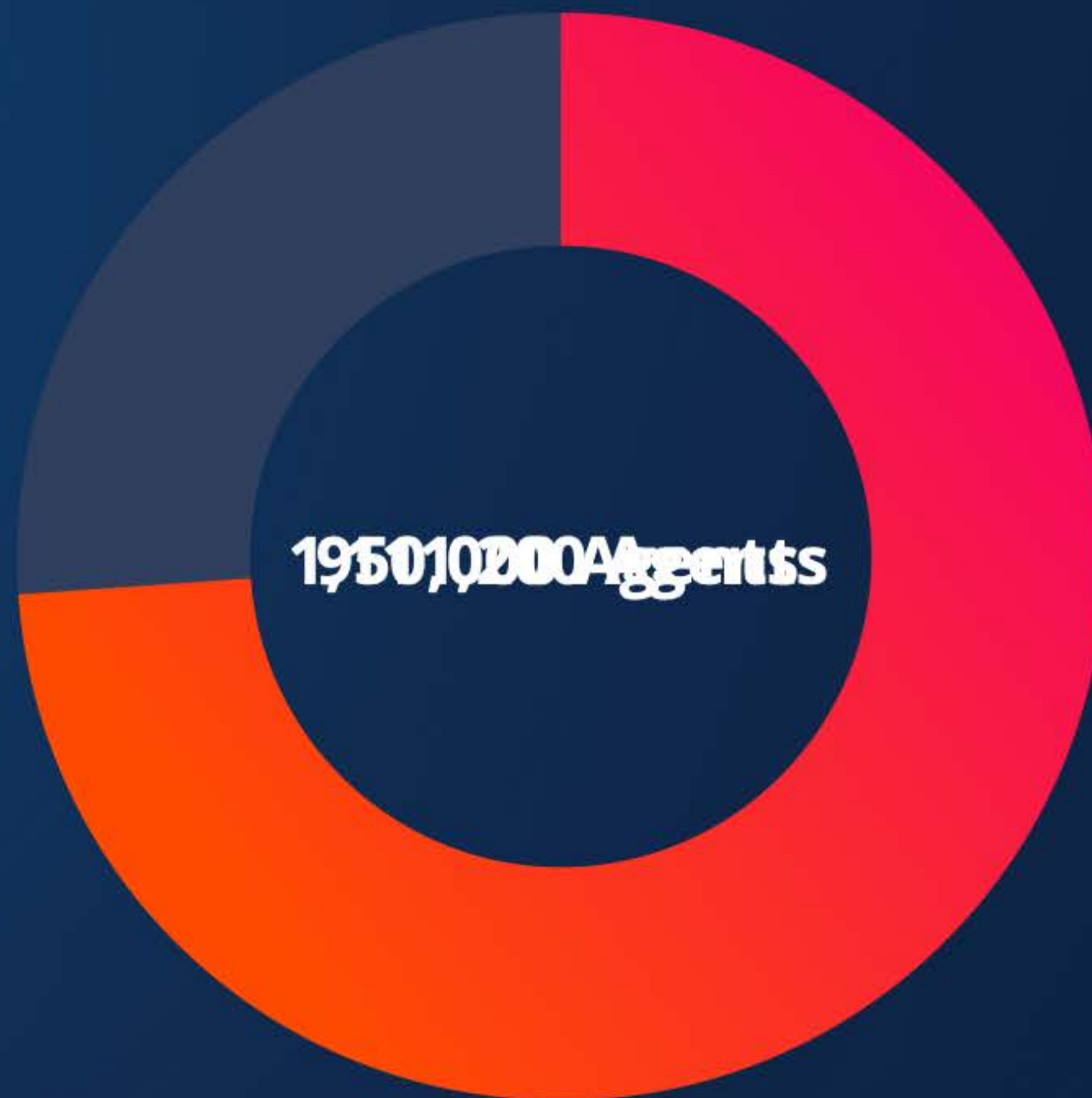
**WAY MORE
LISTINGS!**

Who's controlling the market?

**2,150,011 Listings
sold Jan to July 2024**

74%

% OF AGENTS



0

OF LISTINGS **SOLD**

0

Data for the first 7 months of 2024

14%

% OF AGENTS



1-4

OF LISTINGS SOLD



591,821
Listings Sold

Data for the first 7 months of 2024

6%

% OF AGENTS



5-10

OF LISTINGS SOLD



Data for the first 7 months of 2024

2%

% OF AGENTS



30,557 Agents

11-20

OF LISTINGS SOLD



Data for the first 7 months of 2024

.5%

% OF AGENTS



21-30

OF LISTINGS SOLD



Data for the first 7 months of 2024

.17%

% OF AGENTS

2,579 Agents

31-44

OF LISTINGS SOLD

92,935 Listings Sold



Data for the first 7 months of 2024

.14%

% OF AGENTS

2,134 Agents

45+

OF LISTINGS SOLD

262,295 Listings Sold



Data for the first 7 months of 2024

AGENTS

LISTINGS SOLD



Data for the first 7 months of 2024

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

Who wants

MORE?



SUCCESS SUMMIT

**What's the
insight?**

**“YOU NEED
to Prioritize
LISTINGS!”**

But there's a
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**

First 1/2 - 2024 CLOSED

COACHING PRODUCT	AVG UNITS	AVG VOLUME
CORE+ Coaching	12 	\$6,686,588
ELITE+ Coaching	18 	\$10,823,044
TEAM+ Coaching	90 	\$52,261,385
TEAM Mastery Coaching	197 	\$114,219,383
TEAM Legacy Coaching	432 	\$258,596,252

The Tom Ferry & Revaluate Database Case Study

Let's do some Math!



Contacts in your database/cell?



Multiply that total by 6% = # _____



Average commission check = _____



Multiple the last 2 = \$ _____



There's another
challenge we see..

8%

GENERATES REVENUE



92%

ADMINISTRATIVE TASKS

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
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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 background is dark and out of focus.

“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

STOP!

**Why Are You
Really Here?**

DECISIONS



KNOWLEDGE



ACTIONS



STRUCTURE



DECISIONS



KNOWLEDGE



ACTIONS

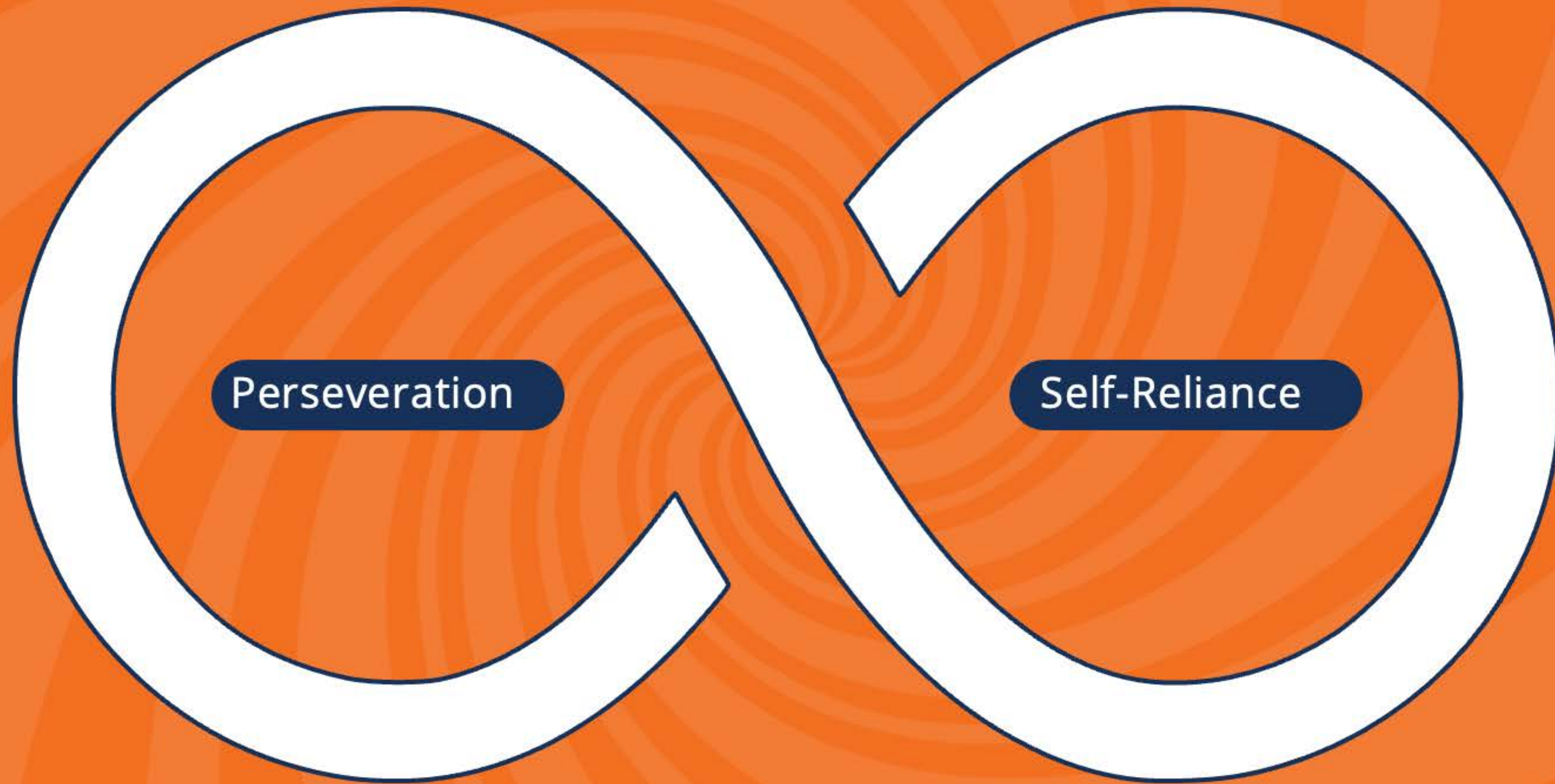


STRUCTURE



2 Thoughts

Feeling Stuck



per•se•ver•a•tion

\ pər-, se-və-'rā-shən \



SUCCESS SUMMIT



DECISIONS



KNOWLEDGE



ACTIONS



STRUCTURE



DECISIONS



KNOWLEDGE



ACTIONS



STRUCTURE



Action Solves
Everything!

The Question...

“What percentage of the information do you need to make a decision?”

Bezos: Decision Process.

- 1.** If its easy to decide and easy to reverse
Do it immediately.
- 2.** If its difficult to decide and difficult to reverse. Make a decision on when you'll decide. (24/48)

SPEED



DECISIONS
KNOWLEDGE
ACTIONS
STRUCTURE



**How do you define Structure?
When Deals and Dollars continue
to come in...
with or without you”**

REVENUE



SUCCESS SUMMIT

REVENUE



SUCCESS SUMMIT

DECISIONS



KNOWLEDGE



ACTIONS



STRUCTURE



REVENUE



We're here to
Rev up the
Revenue!

STOP!
Share what
you're thinking?

**How do we turn 1
listing into 2
more?**

200K

Meredith FOGLE

The Viral Listing Strategy



Gaithersburg, MD



mfogle@yourcoach.com

Homes sold: 25

GCI: **\$568,160**

Volume: **\$21,200,000**



The Viral Listing Strategy

How to Turn 5 Listings into 45



**1.5 Million
Agents**



SUCCESS SUMMIT

4 or Fewer
Listings

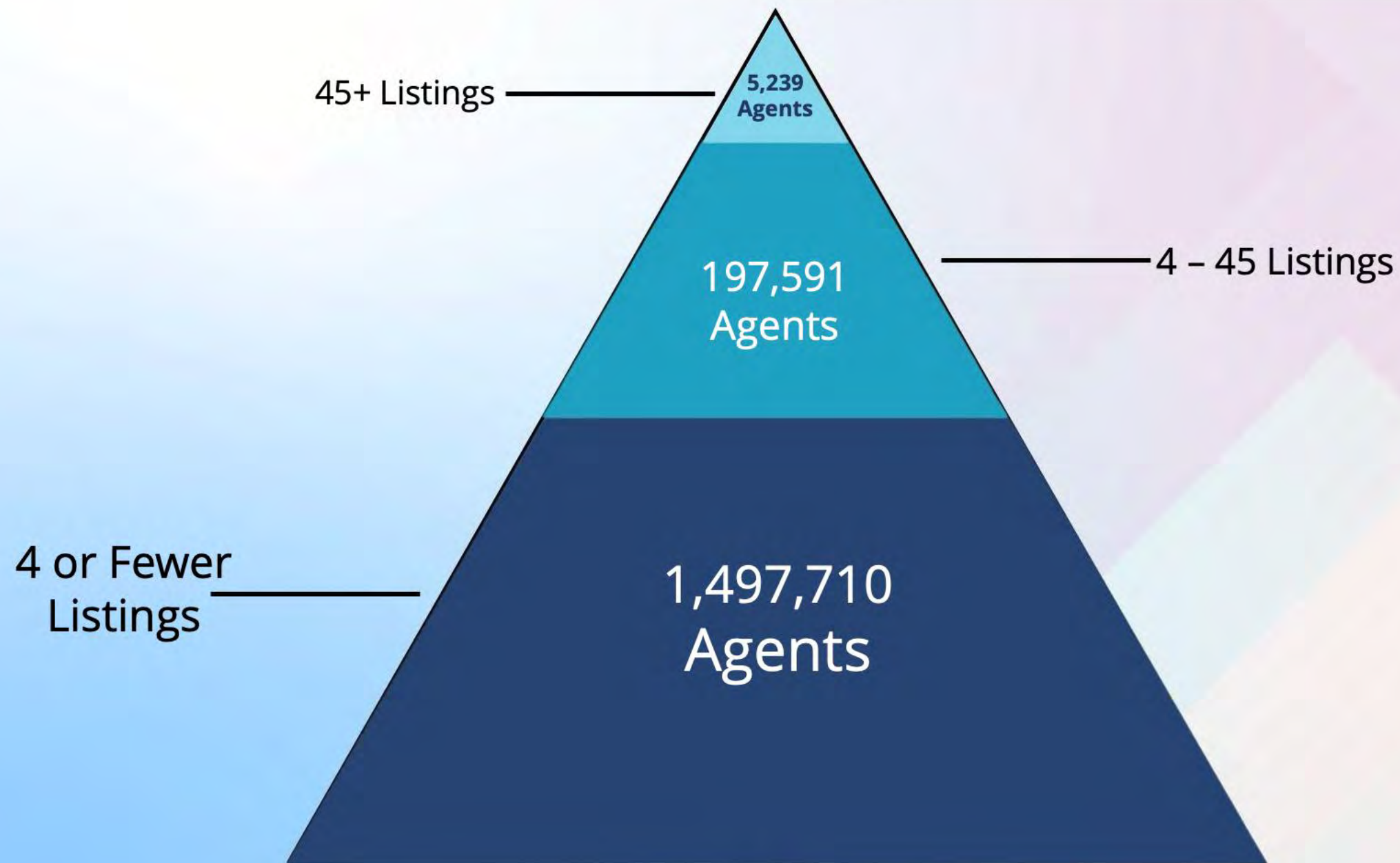
1,497,710
Agents

4 or Fewer
Listings

1,497,710
Agents

197,591
Agents

4 – 45 Listings



Viral Listing Strategy Flywheel





Listing Lead Gen Systems

• **1** **Generate Listing Leads**

• **2**

• **3**

Expired Script 2.0

“Hi, this is (name) with (company). Thank you for taking my call. I know you weren’t expecting a call from me today.

I noticed your house was listed back in (month or year house was on the market) and it looks like you still live in the house, right?

I’m curious, where were you planning to go if you’d sold before?

Is moving to (location they mentioned) still in your plans?

What made you decide to take the house off of the market?

Are you familiar with the way the market has changed since you tried to sell before?

If I could bring you a strong buyer, would you still entertain moving to (location they mentioned)?

When would a good time be for me to take a quick tour of your property and ask you a few more questions about the house and your plans?”

- **1 Generate Listing Leads**
- **2 Convert Listing Leads**
- **3**



Seller Discovery Form

Please answer the questions below so that we'll know more about you prior to our upcoming meeting.

Why is now the right time for you to sell your house? *

Your answer

What is your perception of the market right now? *

- ☐ Strong market/good time to sell
- ☐ Weak market/challenging time to sell
- ☐ Don't know

Do you know with certainty where you are going next? Are you already working with an agent to help you find your next home? *

Your answer

Why am I the right agent to help you sell your home? *

Your answer

Have you met or spoken with any other agents? If so, what questions were left unanswered? Or what stopped you from working with them? *

Your answer

What do you know about us, our business and the way we do things differently to achieve exceptional results for sellers? *

Your answer

What do you know about the benefits of working with a team vs a solo agent? *

Your answer

Do you have idea of the price at which you'd like to list your house? *

What work do you think might be necessary to prepare your house to sell? *

Your answer

What are the top 3-4 questions you are hoping I'll be able to answer when we meet? *

Your answer

Assuming we agree it makes sense to work together, are you prepared to sign a listing agreement when we meet? *



SUCCESS SUMMIT

Highnote Prelisting Presentation

"You've Found the Right Agent!"

LINK



Why Do More Local Sellers Choose Meredith?

Meredith's impressive results are a testament to her expertise and dedication. Her career, built on local knowledge, influential connections, and exceptional communication and negotiation skills, boasts an unparalleled track record. She is the preferred choice for local sellers, who trust her to achieve the most successful sale, guided by a clear understanding of their goals. Her

View link

<https://www.flipsnack.com/meredithfogle/about...>

VIDEO



The List Realty Marketing Team - Making Your Listing Famous!

Imagine hiring a professional marketing team to make your house "famous!" When you hire Meredith to list your house, that's exactly what you get. Your full marketing suite includes professional photography, videography, print marketing targeted to the buyers most likely to purchase your house, online advertising including strategically placed paid advertising, a



SUCCESS SUMMIT

- **1 Generate Listing Leads**
- **2 Convert Listing Leads**
- **3 Leverage Your Listings**

Make My Listing Famous Marketing System



Social Post Series



Blast Email



Door Hangers



Brochures



New Listing Postcards



Walkthrough Video Tour



Instant Showing Sign



Website



Mega Open House



Sold Door Hanger



Every Intersection Sale Arrows



Sold Postcards

The Mega Open House



565 Aguajito, Carmel CA
\$3,800,000



Adamo Ranch – 1,200 Acres

\$34,000,000

The Viral Listing Strategy



The Viral Listing Strategy



“

Your success
is determined by
what's inside YOU.

Steve Harney

Founder, Keeping Current Matters





KEEPING CURRENT MATTERS

Market Update: Answering the Questions on Consumer's Minds

Presented by David Childers, Keeping Current Matters





Fed Chair Powell Signals 'Time Has Come' for September Rate Cut

Jerome H. Powell used a speech in Jackson Hole to signal that the Federal Reserve will begin to cut rates on Sept. 18, and to voice wariness about the job market.

New York Times
August 23, 2024



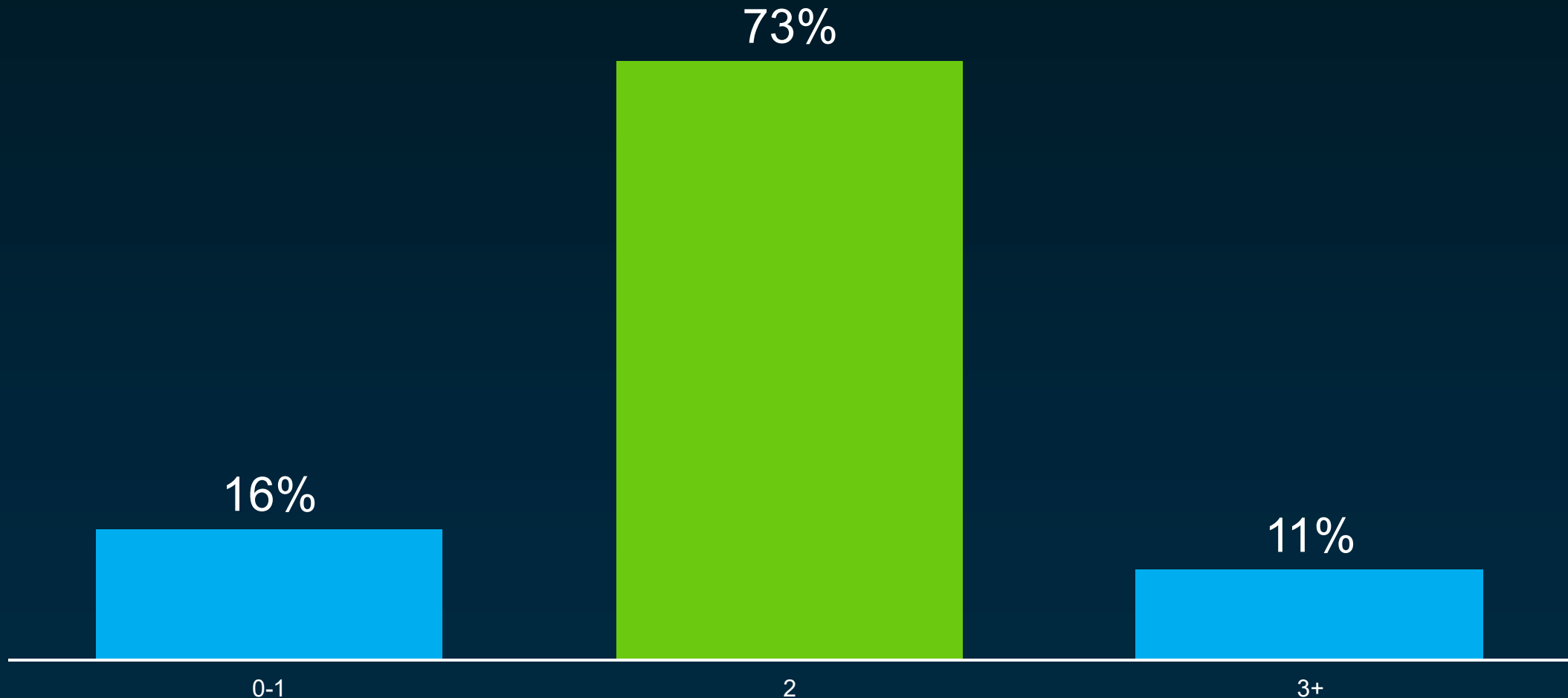
**The time has come for
policy to adjust . . .**

Jerome Powell

Chairman, Federal Reserve (August 22, 2024)

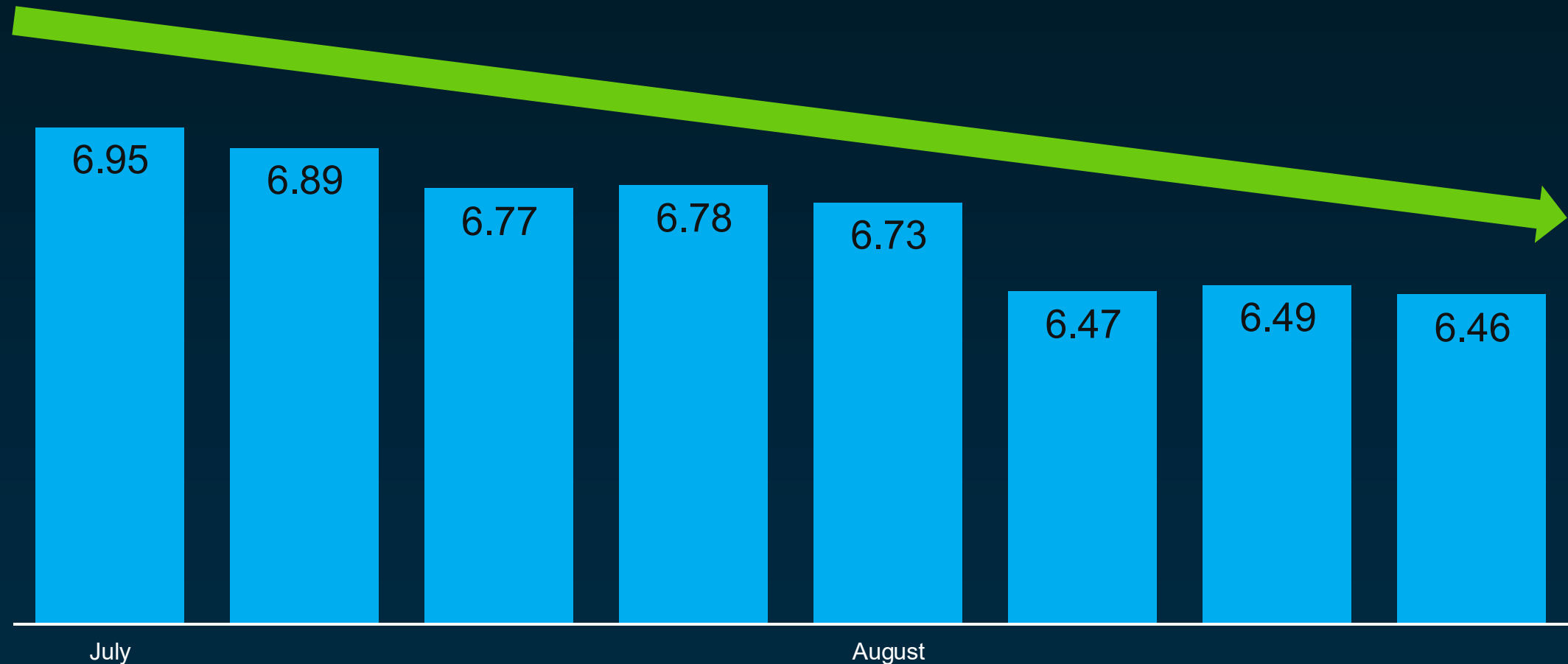
Most Economists Expect 2 Cuts This Year

Number of Federal Funds Rate Cuts Expected This Year, July 17-23 Poll



Mortgage Rates Are Declining

Weekly Averages



The Drop in Mortgage Rates

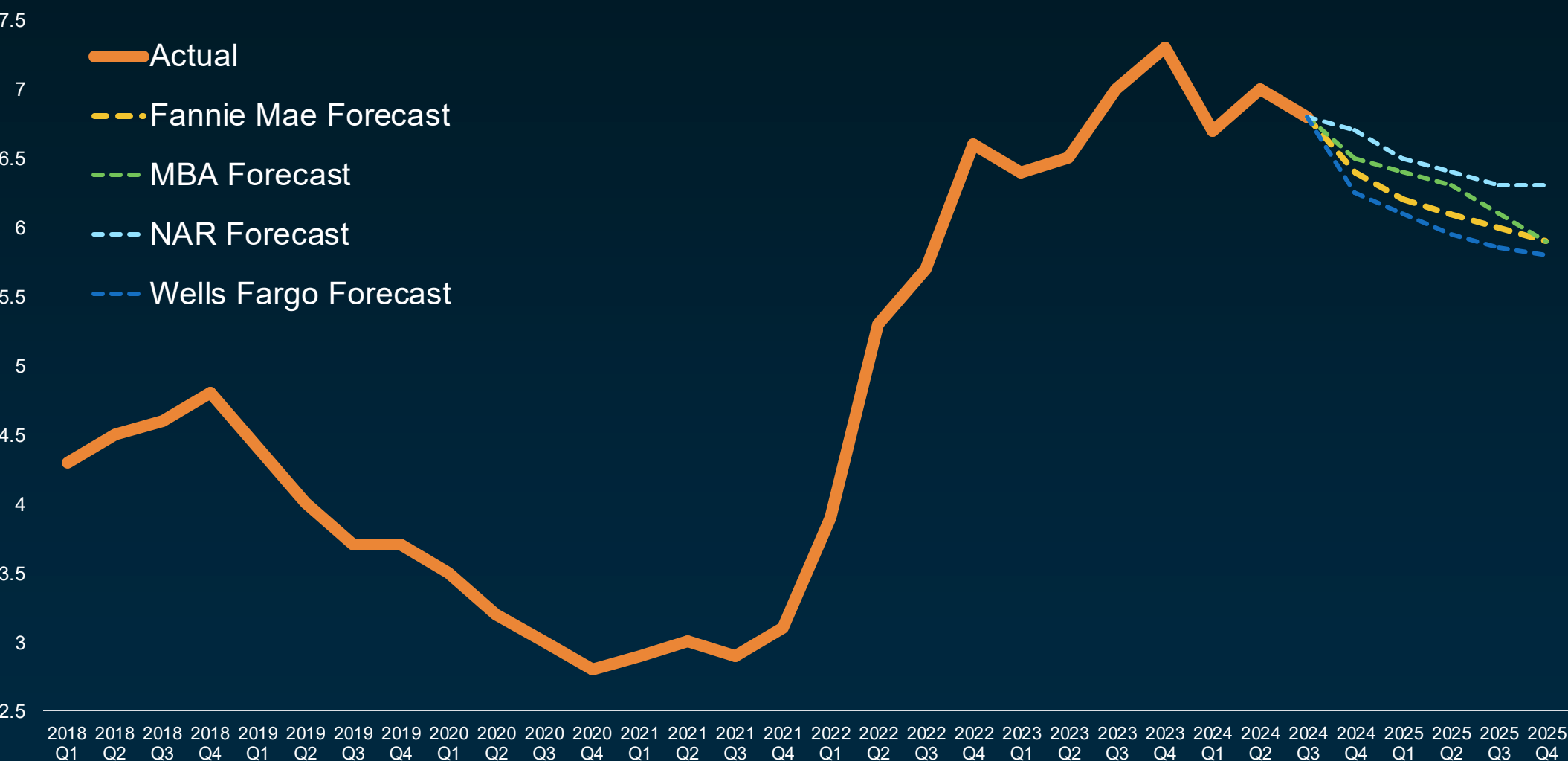
April 2024		Now	
Loan Amount:	\$400,000	Loan Amount:	\$400,000
Mortgage Rate	7.52% (04/25/2024)	Mortgage Rate	6.44% (08/26/2024)
Monthly Payment	\$2,802.34*	Monthly Payment	\$2,512.51*
Difference in Monthly Payment:		\$289.83	
Difference over the Life of the Loan (30 Years):		\$104,338.41	

**Principal and Interest Payment.*

Total Monthly payment may vary based on loan specifications such as property taxes, insurance, HOA dues, and other fees. Interest rates used here are for marketing purposes only. Consult your licensed Mortgage Advisor for current rates.

Mortgage Rates and Projections

30-Year Fixed Rate, As of 8/26/2024





Generally, the rate-cutting cycle is not one-and-done. Six to eight rounds of rate cuts all through 2025 look likely.

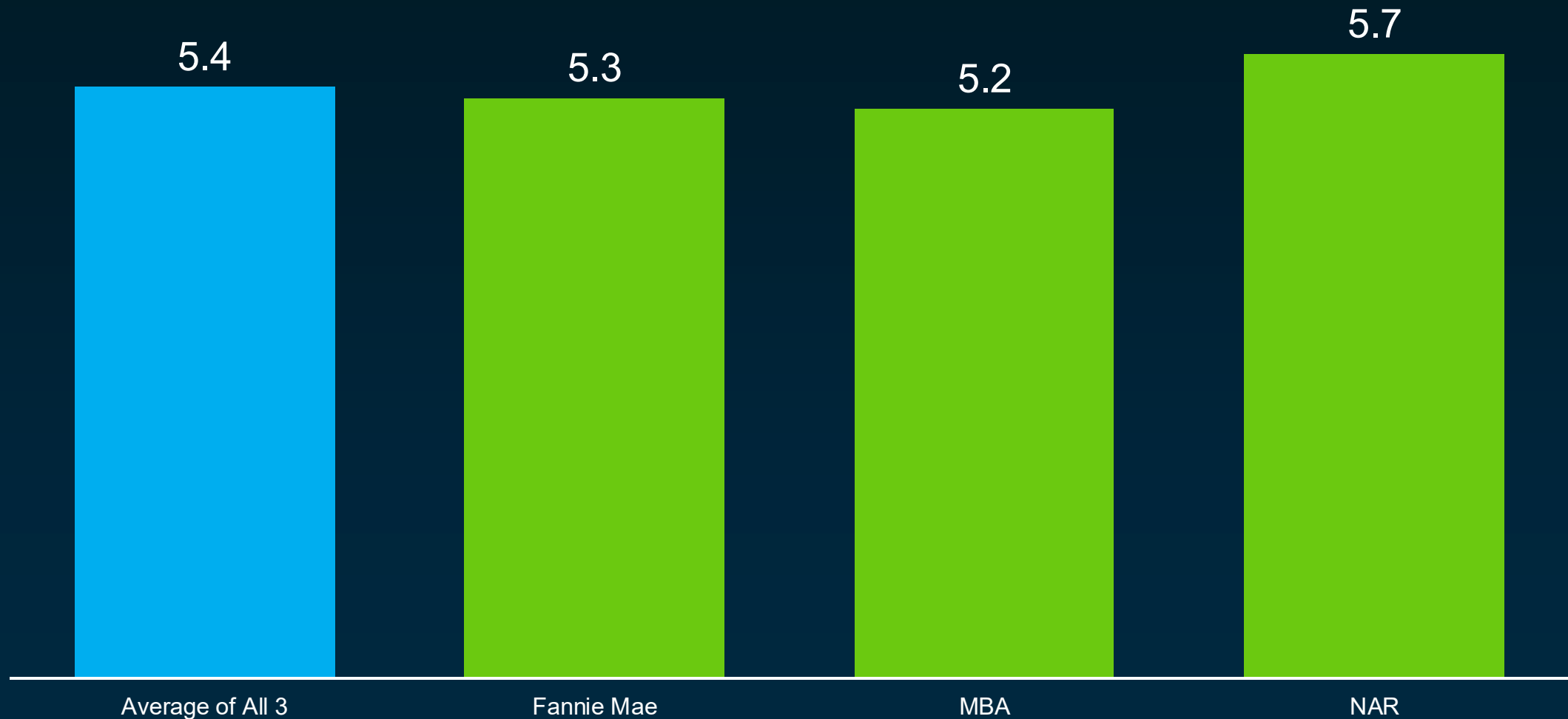
Lawrence Yun
Chief Economist, NAR



What's Ahead?

2025 Total Home Sales Forecasts

In Millions, as of 8/26/2024



2025 Home Price Forecasts

Percent Appreciation as of 8/26/2024





When it comes to the real estate forecast for the next 5 years, I'm cautiously optimistic...

I believe we're going to see a lot of ebb and flow over the next 5 years — some highs, some lows, but overall, a healthy market. Prices should continue to rise, though more slowly, and buyers might enjoy more options as inventory expands.


Dennis Shirshikov

Adjunct Professor of Economics, City University of New York

CONFUSION LEADS TO **FEAR**

FEAR LEADS TO **PANIC**

PANIC LEADS TO **PARALYSIS**



HOW WILL THE ELECTION IMPACT THE HOUSING MARKET?

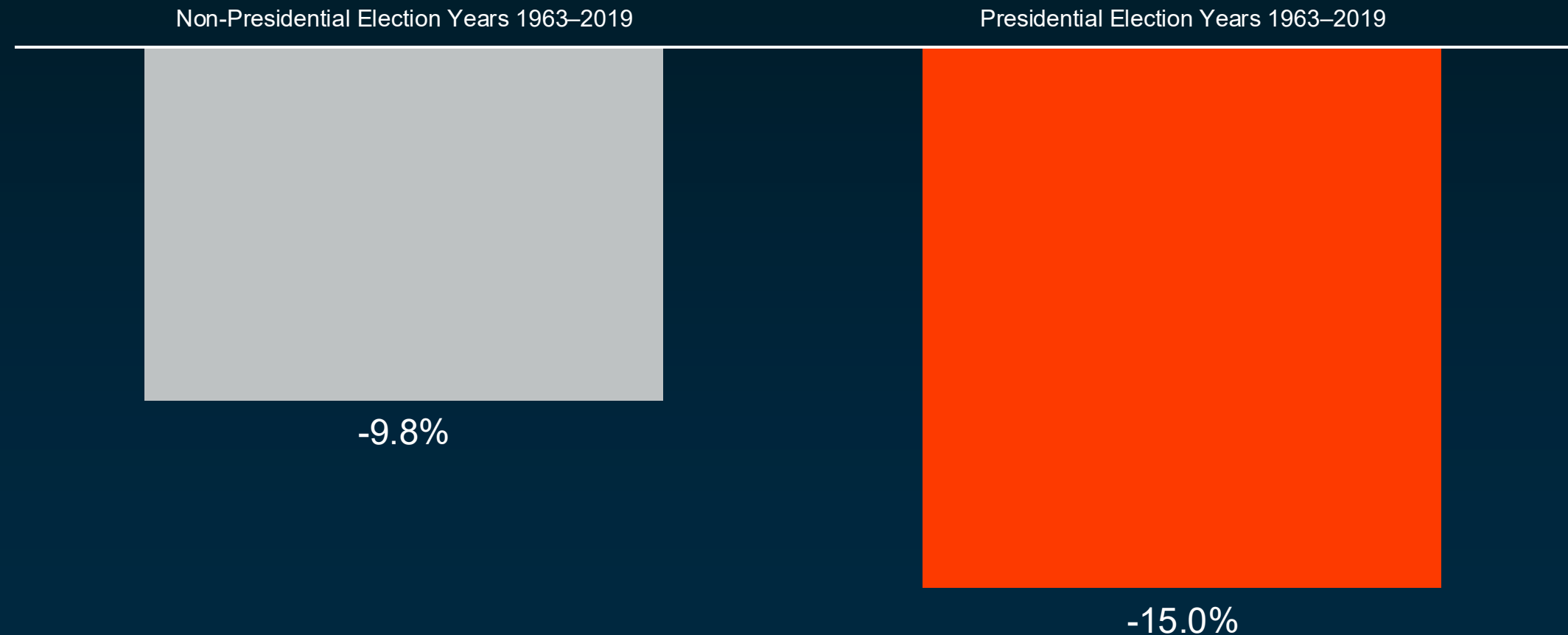


Presidential election years affect the national housing market and mortgage rates through three interrelated channels: uncertainty, policy expectations, and consumer confidence . . .

Al Lord
Founder and CEO, Lexerd Capital Management

Seasonal Drop in Sales Sharper in Presidential Election Years

Percent Change in Actual Monthly New Home Sales, October–November



TYPICALLY

Home Sales Went Up After 9 of the Last 11 Presidential Elections

U.S. Annual Existing Home Sales

Election Year	Year After	
1980: 2,973,000	1981: 2,419,000	↓
1984: 2,868,000	1985: 3,214,000	↑
1988: 3,594,000	1989: 3,290,000	↓
1992: 3,431,000	1993: 3,737,000	↑
1996: 4,167,000	1997: 4,374,000	↑
2000: 5,173,000	2001: 5,335,000	↑
2004: 6,778,000	2005: 7,080,000	↑
2008: 4,110,000	2009: 4,340,000	↑
2012: 4,660,000	2013: 5,090,000	↑
2016: 5,450,000	2017: 5,510,000	↑
2020: 5,640,000	2021: 6,120,000	↑

Existing Home Prices Went Up After 7 of the Last 8 Presidential Elections

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

Election Year	Year After
1992: \$105,500	1993: \$109,100 
1996: \$122,600	1997: \$129,000 
2000: \$147,300	2001: \$156,600 
2004: \$195,200	2005: \$219,000 
2008: \$196,600	2009: \$172,100 
2012: \$177,200	2013: \$197,400 
2016: \$235,500	2017: \$248,800 
2020: \$296,700	2021: \$350,700 

New Home Prices Went Up After 10 of the Last 11 Presidential Elections

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

Election Year	Year After	
1980: \$64,600	1981: \$68,900	↑
1984: \$79,900	1985: \$84,300	↑
1988: \$112,500	1989: \$120,000	↑
1992: \$121,500	1993: \$126,500	↑
1996: \$140,000	1997: \$146,000	↑
2000: \$169,000	2001: \$175,200	↑
2004: \$221,000	2005: \$240,900	↑
2008: \$232,100	2009: \$216,700	↓
2012: \$245,200	2013: \$268,900	↑
2016: \$307,800	2017: \$323,100	↑
2020: \$336,900	2021: \$397,100	↑

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%



For most Americans, election results will have little direct effect on their income and therefore should not significantly impact their decision to buy or sell a home.

Bankrate



Don't wish it were easier, wish you were **better**.

Don't wish for fewer problems, wish for more **skills**.

Don't wish for less change, wish for more **wisdom**.

Jim Rohn

