



THE ULTIMATE REAL ESTATE PLAYBOOK: SYSTEMS THAT WORK

A 10-Step System for Attracting and Managing Listings

Processes, Programs, and a Tech Stack for Consistently Closing

**Meredith
Fogle**



The List Realty



@meredithfoglethelistrealty



At a GLANCE

Meredith Fogle recognized the potential for two things when she entered the industry: the freedom to create her own schedule and the possibility to multiply one listing into many more. To make this not only possible but scalable, she leverages a comprehensive tech stack, specialty programs, and a 10-step system for success.



**The DMV
(DC, MD, VA)**

PRIMARY MARKET



\$650k

AVERAGE PRICE POINT



28

YEARS IN REAL ESTATE

2022 PRODUCTION STATS

121

TRANSACTIONS

\$67,300,000

SALES VOLUME

\$1,717,000

GCI

CORE CLIENTELE

- ✓ Upsizing
- ✓ Lateral movers

PRODUCTION

30% | 70%

Buyers | Sellers

TEAM STRUCTURE

- ✓ 17 agents
- ✓ 4 staff members

Meredith **ON COACHING**



Tom Ferry coaching has been transformative to my business. Before coaching, I was struggling with growing my production, supporting and growing my team, running my business as a business, and finding time for people and activities outside of real estate. I truly didn't realize there was an answer – an ecosystem that already existed with an abundance of generous, supportive, successful, and like-minded industry professionals going through the same struggles and experiencing the same victories. The community support, the individual support of my brilliant coach, the resources available to my entire team, and the unflagging inspiration Tom provides are invaluable. This ecosystem is what helped me grow from a struggling two-person team to a successful team leader now able to enjoy time with my family, to travel, and to grow as a person as a professional – with 16 agents and counting. I am endlessly grateful to Tom for the ecosystem he has built for us and for the incredible people who are part of it.



BY THE NUMBERS

32

Unique systems held in project management systems

100+

SOPs in operations library

7

Listings launched a month on average

3

Listing systems available to clients





THE STORY

Meredith's real estate story began when she was purchasing her own home. The exceptional service she received from her agent, who treated her with the same level of care as her luxury clients regardless of the price point, left an indelible impression. This agent became the inspiration and role model and inspiration for entering the industry, with one factor of the agent's testimony resonating most deeply – the freedom inherent in this career path.

Meredith already had the communication skills developed during her stints in homeowners insurance and customer service, but it was the freedom to manage her own time and ability for success that she craved.

As a novice in the field, Meredith joined a prominent brokerage where she discovered that the more prosperous agents predominantly focused on the listing side, prompting her to do the same. Listings were more than just a transaction – they were catalysts for generating an organic flow of additional business. Eager to glean insights, she diligently queried experienced peers and shadowed their practices, absorbing wisdom day by day.

Early interactions imbued in her the virtues of perseverance and the capacity to withstand rejection, attributing each "no" as a stepping stone toward an eventual "yes." Looking back, she recognizes that it was her mindset that allowed her to become the agent she is today. Her mindset was focused on one primary objective: get more listings. The art of effectively marketing listings metamorphosed into a mechanism for promoting herself and her services, a symbiotic relationship that attracted incoming business.

Soon, she discovered that a single transaction could yield not only three buyers but also two additional listings. Exponential growth was within her grasp, but as business began to boom, it naturally detracted from the freedom she initially craved. Freedom would require a system for managing so many listings at a time. She began leveraging technology, diving headfirst into new advancements to gain an edge and penetrate new markets. This leads to where she is today, managing a team with a highly streamlined system for tackling numerous listings at once.



THE STRATEGY

SYSTEMS-BASED OPERATIONS

- Meredith stresses the importance of integrating agents into existing systems which can be tailored to their unique approaches while offering steadfast support.
- Consistency is everything. If it can't be replicated consistently, it's not a system.
- Several systems form the bedrock of Meredith's business, facilitating a monthly closure rate ranging from 3 to 10 deals.
 - The Listing Preparation System ensures properties are optimally primed for market.
 - The Listing Concierge System offers sellers the luxury of having all of the prep work necessary to take the listing to market seamlessly coordinated by their team.
 - Notably, clients have the option to settle payments post-transaction.
- The "Make My Listing Famous" program stands out as a social media marketing campaign that generates massive attention.

THE TECHNOLOGY STACK

- Systems integrated within robust technology and software solutions have the ability to stand the test of time.
- Monday.com has been the team's central task management and progress tracking system for the past five years.
 - While primarily serving internal needs and streamlining workflows, it plays an instrumental role in their listing launches, allowing each step to be communicated within the team.
- Google Drive is used for backend forms to ensure accessibility, organization, and storage.
 - Leveraging Google Forms, clients sign up for their preferred service level, with automatic integration sending data to Monday or designated staff.
- Google Workspace is a cornerstone of the team's technological framework.
 - The visual-oriented approach of Google Calendar enhances the flow of timelines and allows for the direct integration of images.



THE STRATEGY

- Follow Up Boss is the go-to for customer relationship management.
 - Offers transaction tracking.
 - Serves as a hub for housing educational resources.
- Thinkific is an educational repository which empowers agents to refresh their skills through video tutorials and walkthroughs.
- Their tech ecosystem extends to an Intranet setup via Google and other custom systems, thoughtfully designed to mimic a regular website for agents.
 - Constructed in 2021, it's equipped with intuitive links and tables to ensure streamlined access to essential resources.
- Slack serves as the main internal communication platform.
- Highnote comes into play for pre-appointment presentations.

FORMS TO CAPTURE EVERYTHING

- At the core of Meredith's operational framework lies a comprehensive collection of forms meticulously designed to capture every essential detail.
 - These forms are used to launch diverse programs which elevate the client experience.
- The process is ingeniously simple: agents are required to complete the pertinent information within the form and submit it. The subsequent legwork is managed by the operations team, precisely tailored to the chosen listing program.

A SYSTEM-DRIVEN PROCESS (FULL OVERVIEW)

1. Use The List's listing lead generation systems (they have many) to unlock listing opportunities.
2. Use their Seller Discovery initial conversation system to ask the right questions to prepare for the seller strategy session.
3. Send their "You've Found the Right Agent" pre-appointment Highnote presentation to the seller prior to the appointment date.
4. Use their in-house CMA tool to create the most accurate possible value analysis.
5. Prepare for the appointment (using systems they teach their agents in Career Kick Start).



THE STRATEGY

6. Meet with the seller to consult by asking questions (Phil M. Jones's "Exactly What to Say" has honed their seller consultation methodology) to uncover the seller's pain points and to discover how their services can fulfill their goals.
7. Present The List's suite of seller services that address seller needs:
 - Listing Concierge System
 - Rent vs. Sell Analysis
 - Property Prep and Expected ROI tool
 - Make My Listing Famous Marketing System
8. Ask the seller what else they need to know in order to make a decision about how to proceed – and watch the seller close themselves.
9. Implement the Seller Gifting System and Transaction Coordination System.
10. Move the client to their Past Client Gifting System when the transaction closes.

Meredith's 3 Action Items **FOR SUCCESS**

1

R&D (rip-off and duplicate) things that are already working for other people. Take what's already out there and running. Don't reinvent the wheel.

2

Take time to document and record what is working for you. It will multiply your time later.

3

Don't feel stuck or inert if you don't have the most beautiful system yet; the best systems are built to evolve.

6 Things Meredith Will Do **MOVING FORWARD**

1

Develop agent training tutorial video series (to be placed on team YouTube channel) walking agents through the systems.

2

Track and measure KPIs (specifically listing lead conversion rates, listing market share increase, and listing time-on-market measures) to monitor system effectiveness.

3

Solicit feedback from agents using the programs and materials to continue to refine each system and their assets.

4

Hire additional support staff as needed to facilitate expansion of each system as agent count and listing units numbers increase.

5

Review systems annually against company growth and profitability goals and revise/refresh as needed.

6

Work with her Tom Ferry coach to help keep her accountable and implement these ideas!

Meredith's TOOLKIT



FIND THE BELOW TOOLKIT ITEMS IN illūm

Listing Systems Package

Overview of the various listing options offered by The List Realty.

Listing Transaction Concierge Form

Example of The List Realty's Listing Concierge Google Form.

Make My Listing Famous Program Form

Example of the Google form for the "Make My Listing Famous" listing program.

System and Program Tracking

Examples of the interfaces Meredith's team use to manage their various programs in Monday.com and Google.