

More Appointments Now:
The Team Prospecting Challenge Playbook





Congratulations on downloading “More Appointments Now: The Team Prospecting Challenge Playbook.”

Here’s what we know:

Appointments are the leading indicator of a healthy real estate business. The more appointments your team books, the more business they’ll close.

Here’s another thing we know:

There’s no better way to inspire your team to book lots of appointments than running a contest! This “playbook” will walk you through every step of running a highly effective team appointment setting challenge.

Don’t be shy about running these contests regularly... two, three, or even four times annually! (More than four might be pushing it.)

Not only will they result in more appointments and more closed transactions, but also a stronger sense of camaraderie and positive culture among your team members.

Read through this guide and start planning your first challenge today!

Also, be sure to take advantage of your Team coaching consultation. It’s completely free and will show you how at Tom Ferry, we’re ready to “meet you where you are” with our three distinct Team coaching programs. We’ll be in touch to schedule it shortly!

A handwritten signature in black ink that reads 'Tom' followed by a stylized, cursive flourish.

Tom Ferry



1. Choose two agents, one to captain each team.



2. Have the team captains choose their teams (or the sales manager choose for them). Teams should be balanced between newer and experienced agents.



3. Have the teams create their names.



4. Establish designated call times when everyone makes their calls, keeping track of conversations and appointments set.



5. Each week, team members tally their results and give them to their team captains to sum up. In turn, the captains submit their numbers to the sales manager to establish weekly winners and leaders.



6. Agents write their daily numbers on the leaderboard. Manager updates leaderboard weekly to post weekly individual agent winners and where teams stand against each other.



7. Awards are given to agents who win in each category in any given week.



8. At the end of the pre-established contest period, an award is given to the team that has the most appointments set and another is given to the team with the most conversations.



9. The grand prize? Everyone's a winner as everyone gets more deals done!



A Prospecting Glossary

Affirmations - Say them often whether you fully believe them or not: "I thrive on prospecting. I dominate in appointment setting. I love contacting people because with every call I'm one step closer to a sale!"

Competition - It's hard to make your calls on your own. It's much easier when you participate as a team with shared camaraderie and accountability. Having a prospecting partner helps. But to go all in when the occasion arises, use the Team Prospecting Challenge.

Conversations - You're aiming for any form of engagement, whether face-to-face, or by phone, DM or text, during which you discuss some aspect of your business. If you just chat about life, it doesn't count as a conversation. And remember to close for the appointment.

Hours of Power - Block out two hours a day for prospecting. No distractions. No interruption. No excuses.

Mindset - Prospecting is a matter of inches - the six inches between your ears. Listen to what you're saying to yourself. Positive self-talk is essential to success.

Posture - Stand up. Use a headset so you can use your hands naturally. Have space to walk around. Smile as you talk. They won't see it, but they'll hear it.

Role-play - Learn your scripts. Memorize. Personalize. Internalize. Practice with others, frequently. And always before a call session.

Scripts - Knowing what to say builds confidence and competence. Here's a formula for speaking to your database: The acronym F.O.R.D. Ask people about their family, occupation, recreation and dreams. Chances are, when you ask about their occupation, they'll ask about yours.

Time of Day - We believe optimal times to call are...
But don't let conflicts with those times serve as excuses. Whatever works best for you, commit to it and make your calls!

Winning - An attitude. A practice. A destiny.



Agent Scorecards

(To be completed weekly by each agent and turned in to the team captain.)

----- (Cut here) -----

Week 1 - Agent Name _____

	Day 1	Day 2	Day 3	Day 4	Day 5
Conversations	_____	_____	_____	_____	_____
<i>Listing Appts Set</i>	_____	_____	_____	_____	_____
<i>Buyer Appts Set</i>	_____	_____	_____	_____	_____
Total Appts Set	_____	_____	_____	_____	_____

My Conversations Goal This Week: _____

My Total Conversations This Week: _____

My Total Appointments Set Goal This Week: _____

My Total Appointments Set This Week: _____

----- (Cut here) -----

Week 2 - Agent Name _____

	Day 6	Day 7	Day 8	Day 9	Day 10
Conversations	_____	_____	_____	_____	_____
<i>Listing Appts Set</i>	_____	_____	_____	_____	_____
<i>Buyer Appts Set</i>	_____	_____	_____	_____	_____
Total Appts Set	_____	_____	_____	_____	_____

My Conversations Goal This Week: _____

My Total Conversations This Week: _____

My Total Appointments Set Goal This Week: _____

My Total Appointments Set This Week: _____

----- (Cut here) -----



Agent Scorecards

(To be completed weekly by each agent and turned in to the team captain.)

----- (Cut here) -----

Week 3 - Agent Name _____

	Day 11	Day 12	Day 13	Day 14	Day 15
Conversations	_____	_____	_____	_____	_____
<i>Listing Appts Set</i>	_____	_____	_____	_____	_____
<i>Buyer Appts Set</i>	_____	_____	_____	_____	_____
Total Appts Set	_____	_____	_____	_____	_____

My Conversations Goal This Week: _____

My Total Conversations This Week: _____

My Total Appointments Set Goal This Week: _____

My Total Appointments Set This Week: _____

----- (Cut here) -----

Week 4 - Agent Name _____

	Day 16	Day 17	Day 18	Day 19	Day 20
Conversations	_____	_____	_____	_____	_____
<i>Listing Appts Set</i>	_____	_____	_____	_____	_____
<i>Buyer Appts Set</i>	_____	_____	_____	_____	_____
Total Appts Set	_____	_____	_____	_____	_____

My Conversations Goal This Week: _____

My Total Conversations This Week: _____

My Total Appointments Set Goal This Week: _____

My Total Appointments Set This Week: _____

----- (Cut here) -----



Team 1 Tallies

(To be completed weekly by team captain and turned in to the sales manager.)

Week 1 Totals for Team _____

Name _____ Most Conversations This Week: _____

Name _____ Most Appointments Set This Week: _____

Total Team Conversations This Week: _____

Total Team Appointments Set This Week: _____

Week 2 Totals for Team _____

Name _____ Most Conversations This Week: _____

Name _____ Most Appointments Set This Week: _____

Total Team Conversations This Week: _____

Total Team Appointments Set This Week: _____

Week 3 Totals for Team _____

Name _____ Most Conversations This Week: _____

Name _____ Most Appointments Set This Week: _____

Total Team Conversations This Week: _____

Total Team Appointments Set This Week: _____

Week 4 Totals for Team _____

Name _____ Most Conversations This Week: _____

Name _____ Most Appointments Set This Week: _____

Total Team Conversations This Week: _____

Total Team Appointments Set This Week: _____



Team 2 Tallies

(To be completed weekly by team captain and turned in to the sales manager.)

Week 1 Totals for Team _____

Name _____ Most Conversations This Week: ____

Name _____ Most Appointments Set This Week: ____

Total Team Conversations This Week: ____

Total Team Appointments Set This Week: ____

Week 2 Totals for Team _____

Name _____ Most Conversations This Week: ____

Name _____ Most Appointments Set This Week: ____

Total Team Conversations This Week: ____

Total Team Appointments Set This Week: ____

Week 3 Totals for Team _____

Name _____ Most Conversations This Week: ____

Name _____ Most Appointments Set This Week: ____

Total Team Conversations This Week: ____

Total Team Appointments Set This Week: ____

Week 4 Totals for Team _____

Name _____ Most Conversations This Week: ____

Name _____ Most Appointments Set This Week: ____

Total Team Conversations This Week: ____

Total Team Appointments Set This Week: ____



Weekly Team Winners

(To be completed weekly by the sales manager.)

Week 1 Winners

Agent Winner-of-the-Week _____ # of Conversations _____

Agent Winner-of-the-Week _____ # of Appointments _____

Team-in-the-Lead _____

Cumulative Total Conversations: _____

Team-in-the-Lead _____

Cumulative Total Appointments: _____

Week 2 Winners

Agent Winner-of-the-Week _____ # of Conversations _____

Agent Winner-of-the-Week _____ # of Appointments _____

Team-in-the-Lead _____

Cumulative Total Conversations: _____

Team-in-the-Lead _____

Cumulative Total Appointments: _____

Week 3 Winners

Agent Winner-of-the-Week _____ # of Conversations _____

Agent Winner-of-the-Week _____ # of Appointments _____

Team-in-the-Lead _____

Cumulative Total Conversations: _____

Team-in-the-Lead _____

Cumulative Total Appointments: _____

Week 4 Winners

Agent Winner-of-the-Week _____ # of Conversations _____

Agent Winner-of-the-Week _____ # of Appointments _____

Team Winner _____

Cumulative Total Conversations: _____

Team Winner _____

Cumulative Total Appointments: _____