

2025 | LISTING LEADER EDITION

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THE BILLION DOLLAR PLAYBOOK
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GET THE GOODS.

ACCESS THE **BILLION** DOLLAR PLAYBOOK DIGITAL TRAINING COMPANION IN REVII (FORMERLY ILLUM)



This online resource is packed with valuable templates, checklists, and real-world examples, bringing the strategies to life and making implementation seamless. Dive into the digital companion to maximize your learning and streamline your journey to listing success! A login is required. If you do not already have a Revii account, you will be asked to create one



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BE A FUTURE LISTING LEADER.

Listing leaders are not just participating in the market; they are shaping it. This requires a mindset dedicated to excellence, strategic marketing, and the ability to close deals with confidence.

Leading with listings is your gateway to market dominance. By focusing on listings, you gain more control over your business, generate more leads, and establish a ripple effect that can elevate your brand presence. Each listing becomes an opportunity to create new relationships, attract buyers, and pave the way for future success.

Being a true listing leader means embodying the qualities that attract sellers and inspire trust. You have to market, close, and attract new business like a Listing Leader. It's about strategically positioning yourself, staying informed on market trends, and consistently showing your expertise. In this role, you are a trusted expert—someone clients rely on for knowledge and guidance in their most significant transactions.

Prepare to dive deep into strategies that will sharpen your skills and elevate your presence in the real estate market. Explore the nuances of effective marketing, from creating compelling listings to building a personal brand that clients are drawn to. Your commitment to becoming a knowledge expert and informed advisor will set you apart and solidify your status as a leader in your market.

Be proud of for embarking on this journey. It promises to help you to grow, succeed and most importantly LEAD.

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MARKET LIKE A LISTING LEADER

DISCOVER STRATEGIES AND INSIGHTS TO ELEVATE YOUR MARKETING EFFORTS, POSITIONING YOURSELF AS THE GO-TO EXPERT IN YOUR MARKET.

Being a Listing Leader means not just showcasing properties, but crafting a compelling narrative that attracts and engages potential buyers. We'll explore techniques to amplify your brand, leverage digital platforms, and create marketing campaigns that resonate with your target audience, ensuring your listings stand out and draw the attention they deserve.

Billy Bruce

Authenticity Earns the Listing: Adding a Personality to Your Brand

Meredith Fogle

The Viral Listing Strategy: 5X Your Transactions from 1 Listing!


Judy Michaelis

Direct Mail Campaigns for Winning Your Audience:
High Level Strategy and Detailed Tactics for Winning with Mailers



THE ULTIMATE REAL ESTATE PLAYBOOK: LISTING ATTRACTION MULTIPLIER

The Viral Listing Strategy

5X Your Transactions from 1 Listing!




**MEREDITH
FOGLE**

 The List Realty
 @meredithfoglethelistrealty



THE ULTIMATE REAL ESTATE PLAYBOOK: THE LISTING EXPERT

Authenticity Earns the Listing

Adding a Personality to Your Brand



Billy Bruce

 Billy Bruce Realty
 @billybrucerealty

THE ULTIMATE REAL ESTATE PLAYBOOK: LISTING ATTRACTION MULTIPLIER

Direct Mail Campaigns for Winning Your Audience

High Level Strategy and Detailed Tactics for Winning
with Mailers



**Judy
Michaelis**

 Coldwell Banker
 @judymichaelisrealtor



THE ULTIMATE REAL ESTATE PLAYBOOK: THE LISTING EXPERT

Authenticity Earns the Listing

Adding a Personality to Your Brand

Billy Bruce

 Billy Bruce Realty

 @billybrucerealty

At a GLANCE

When Billy Bruce noticed that his competition didn't implement social media into their marketing campaigns, he saw an opening and set out to be the realtor associated with Southwest Missouri. By hiring a videographer and giving his videos a personal touch, he's able to reach the hearts and listings of his clientele.



**Southwest
Missouri**

PRIMARY MARKET



\$230K

AVERAGE PRICE POINT



7

YEARS IN REAL ESTATE

PREVIOUS PRODUCTION STATS

103

TRANSACTIONS

\$15,579,000

SALES VOLUME

\$364,636

GCI

CORE CLIENTELE

- ✓ Retirement
- ✓ "Coming Back Home" clientele

PRODUCTION

43% | 57%

Buyers | Sellers

TEAM STRUCTURE

- ✓ 7 agents
- ✓ 1 admin



BY THE NUMBERS

8,000

Number of views on his highest performing reel.

30-40

Number of consistent listings for the past two years.

25%

Percentage of customers that are repeat customers.

6X

The amount of views he gets on average on his gratitude reel.

90%

Percentage of customers that are from sphere of influence.

20-30

Hours per week saved by implementing a videographer.





THE STORY

In a world where real estate transactions often feel transactional and detached, Bruce has carved out a distinct niche by infusing his business practices with authenticity and a personal touch. At the heart of his strategy is the innovative use of social media, which he skillfully employs to build genuine connections with his audience. Instead of resorting to glossy, impersonal content, Bruce opts to showcase his real, day-to-day activities. This transparency not only demystifies the real estate process but also fosters trust and loyalty among potential clients.

Bruce's journey into social media began as a leap into the unfamiliar, but it quickly transformed into a powerful tool for professional and personal growth. He recognized early on the potential of these platforms to transcend traditional marketing boundaries, offering a direct line to his community. By sharing candid moments and behind-the-scenes glimpses into his life and business, Bruce has created a narrative that resonates with his audience on a deeper level.

Central to his approach is the belief that real estate is inherently about relationships. Bruce's use of social media as a window into his world underscores his commitment to service over sales, where every interaction is an opportunity to build rapport and trust. His followers, both potential and existing clients, get to experience not just properties but also the person behind the properties. This approach has distinguished Bruce in a crowded market by showing that he values people over transactions.

His dedication to authenticity extends beyond content; it's a philosophy that enriches his business model. Through social media, Bruce has been able to extend his reach, engage in meaningful conversations, and cultivate a network that appreciates not just his professional acumen but his genuine personality. This strategy has turned social media from a mere tool into a virtual handshake, welcoming clients into a space where they feel valued and understood.

As Bruce contemplates the future, his focus remains steadfast on evolving his digital presence while staying true to his authentic self. By continuing to intertwine personal storytelling with professional insights, he's ensuring his brand remains relatable and credible. Bruce's journey is a testament to the power of personal connection in real estate, proving that when you put people first, success naturally follows.



THE STRATEGY

AUTHENTICITY AND REAL-LIFE INTERACTIONS

Being genuine and show real-life interactions in social media posts. Billy's highest-performing videos are those that showcase day-to-day activities and authentic moments, rather than overly polished content.

ENGAGING CONTENT

- Strive for content that resonates on a personal level. Videos that give a heartfelt message, like showing appreciation to the team, tend to have higher engagement.
- A video of Billy acknowledging his team members' hard work is one of his best performing videos, showing that simple, sincere communications can make a significant impact.

CONSISTENCY AND ADAPTABILITY

- Initially, Billy used a social media manager and outside firms, but later he found more success with in-house management.
- Consistency in posting and engaging with followers is crucial. Shift posting strategy to allow for more genuine and spontaneous content creation. Adapt strategies based on what works best.

UTILIZING DIFFERENT SOCIAL MEDIA PLATFORMS

- Use several social media platforms, including Instagram, Facebook, and YouTube. Tailors content to fit the medium, keeping it native to the platform.
- For instance, Billy mentions using Instagram Reels and Stories effectively to showcase behind-the-scenes moments and share more personal insights.



THE STRATEGY

ENGAGEMENT AND INTERACTION

- Respond to comments and engage with followers in a meaningful way. Whether through emojis or personalized comments, focus on building a community and fostering direct interactions.
- Places importance on engagement-driven content rather than just posting for the sake of it.

STORYTELLING AND VISUAL VARIATION

- Use storytelling to make content more compelling. For example, sharing a narrative about a difficult day or a success story helps humanize the brand and makes you relatable.
- Incorporating visual variations and spontaneous elements keeps the content fresh and engaging.

EDUCATIONAL AND INFORMATIVE CONTENT

- Providing value through content. Share real estate tips, market trends, local insights, and position yourself as a reliable source of information.

PRACTICAL TIPS

- Batch Filming
 - Create a reservoir of content in one go to ensure consistent posting.
- Mix of Content
 - Combine personal anecdotes with professional insights to keep the audience engaged.
- Adapt and Measure
 - Regularly review the performance of different types of posts and adapt strategies accordingly.
- Be Genuine
 - Authenticity can create a stronger connection with your audience than overly curated content.

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

1

Dive deep into your database. Own it and nurture it by maintaining regular communication with your contacts. Hosting community events such as block parties, rodeo sponsorships, county fairs, or school drives can help you stay connected and top-of-mind within your community.

2

Strive for perfection in your marketing efforts. Instead of comparing yourself to local competition, benchmark against top performers nationwide. Social media is increasingly becoming a significant source of credibility for many potential clients. Use social platforms not just to promote listings but to build a brand that exudes expertise and trust.

3

Once you engage with a client, prioritize understanding their deeper motivations for selling. By relating to and fully comprehending their reasons for exiting or selling their property, you can tailor your approach to better address their needs and build a stronger client relationship.

6 Things Billy Will Do **MOVING FORWARD**

1

Expand and nurture the database with a CRM and add a monthly newsletter for increased engagement. Billy will continue his four annual mailers, maintaining regular communication.

2

Continue enhancing marketing efforts by outsourcing some editing, allowing Billy to maintain high-quality content without overextending himself.

3

Prioritize YouTube content, focusing on property showcases and tours. A regular posting schedule will enhance video value, boost reach, and build credibility.

4

Host an even bigger block party for his two-year anniversary, aiming for higher turnout and engagement. These events boost community interaction and create significant brand buzz.

5

Boost his 'real talk' content with candid reels filmed in his pickup, showcasing daily tasks. This approach will enhance personal connection and build authenticity and trust with his audience.

6

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

Billy's TOOLKIT

NEW DIGITAL COMPANION
find the below toolkit items in

Revii™



EXAMPLE: The Gratitude Reel

One of Billy's favorites, The Gratitude Reel, shows his appreciation towards his team's successes.

EXAMPLE: Content Comparison

Billy's changed his content since he implemented social media, see those changes for yourself!

GUIDE: How to be Authentic on Camera

It's not always easy to act natural, where should you start?

GUIDE: Questions to Understand a Client's Deeper Motives

It's not always easy to read your customers, but you can read this guide to find some telltale signs of what they might actually be wanting!

NOTES

THE ULTIMATE REAL ESTATE PLAYBOOK: LISTING ATTRACTION MULTIPLIER

The Viral Listing Strategy

5X Your Transactions from 1 Listing!

MEREDITH
FOGLE

 The List Realty

 @meredithfoglethelistrealty



AT A GLANCE

The Viral Listing Strategy is a comprehensive systems that works every time, regardless of market conditions, to leverage every listing into many more and create consistent revenue. In Meredith Fogle's words: "Every aspect is designed to maximize exposure and efficiency."



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

PRIMARY MARKET



\$650k

AVERAGE PRICE POINT



28

YEARS IN REAL ESTATE

PREVIOUS PRODUCTION STATS

64

TRANSACTIONS

\$ 32,755,945

SALES VOLUME

\$ 850,778

GCI

TOP LEAD SOURCES

- ✓ Database - 24%
- ✓ Geofarm - 22%
- ✓ Online leads - 9%

PRODUCTION

30% | 70%
Buyers | Sellers

TEAM STRUCTURE

- ✓ **15 agents**
- ✓ **4 staff members**

Meredith ON COACHING



"Tom Ferry Coaching has transformed my business and personal life in unimaginable ways. I initially joined to overcome inconsistent scaling and team-building struggles, I found myself trapped in a "J-curve" pattern, sacrificing important family moments for business highs and lows. **Tom Ferry Coaching provided the systems, strategies, and support I needed to build a solid foundation and a thriving team.** My coach has been pivotal, offering unwavering support and growth-driven guidance. **An invaluable benefit has been the incredible, family-like community of generous, innovative, and successful industry leaders.** The Tom Ferry Ecosystem provides next-level support and idea-sharing, to an often isolating industry and profession. I am endlessly grateful to Tom and his phenomenal team for the numerous gifts that being part of this incredible ecosystem has given me, my business, and my family."



BY THE NUMBERS

45

Transactions generated from 5 initial listings

\$30M+

Sales volume generated from strategy on average annually

\$750K

GCI generated from strategy on average annually





THE STORY

It all started during the housing crisis of 2008, a year that brought a significant market shift and left Meredith questioning everything she knew about real estate. **Rather than let this hold her back, she instead deconstructed her previous success to reverse-engineer a strategy that would work regardless of market conditions.** She began to see listings not as standalone transactions but as investments in future business, eventually developing the "Viral Listing Strategy Flywheel."

This groundbreaking strategy allowed her to leverage each listing to generate multiple new ones, entirely transforming her career. **Meredith employs a comprehensive system that changes the way agents approach listings by focusing on attracting more listings rather than just buyers.** This mindset and strategy have allowed her to turn 5 listings into 45, and to continue to scale from there.

Eventually, Meredith noticed a pattern: each listing generated three buyers, and one out of three buyers became a new listing.

The cornerstone of Meredith's strategy is the use of integrated technology. She began incorporating tech solutions early in her career to stay ahead of the curve and penetrate new markets. Utilizing tools like Monday.com, Google Workspace, and CRM systems like Follow Up Boss, her team maintains high efficiency.

Meredith's Viral Listing Strategy is built on the core belief: your first five listings are the hardest, but scaling becomes increasingly easier. This is because **every listing creates momentum and attracts more opportunities.** However, many agents make the fatal mistake of merely listing properties on the MLS and moving on to the next transaction. Truly successful agents market listings to create even more listings, leveraging each opportunity to its fullest potential.



THE STRATEGY

THE VIRAL LISTING STRATEGY

The Viral Listing Strategy aims to transform each listing into a cascade of new opportunities, potentially earning agents three buyers and two additional listings from one initial listing. It takes a comprehensive approach, blending Listing Systems and AI-powered tech tools to maximize each listing's potential and results.

- Comprised of a Listing Systems Suite and a Tech and AI suite.
- Blue outer ring for generating new listings and attracting buyers.
- Orange inner ring for enhanced tech and AI tools.
- Centralizes information capture via Google forms.

MARKETING MINDSET

Successful implementation requires agents to view marketing as an investment, not a cost. This proactive approach will not only maximize opportunities but also build a robust reputation, ensuring long-term success.

- Run mega open houses to attract future sellers.
- Offer to hold open houses for colleagues.
- Leverage innovative marketing techniques.
- Establish yourself as a significant market player.

SELLER-FOCUSED SYSTEMS

The strategy's success hinges on leveraging the outer ring systems. The Listing Lead Gen System Suite, Seller Discovery System, and Make My Listing Famous Marketing System are essential components that ensure each listing can create at least one additional listing and three buyers.

- Stack the odds for converting listing leads.
- Utilize a simple Google Form for capturing seller information.
- Prepare agents ahead of listing appointments.
- Employ video-heavy digital pre-listing presentations via Highnote.
- Increase likelihood of signed listing agreements.



THE STRATEGY

MAKE MY LISTING FAMOUS SYSTEM

This system incorporates professional photography, custom videos, comprehensive social media campaigns, and property-specific marketing materials to ensure maximum exposure and efficiency.

- Social media-driven marketing approach.
- Includes professional photography and custom videos.
- Comprehensive suite: website, email blast, door-hangers, etc.
- Mega Open House and Neighbor Sneak Preview for maximum exposure.
- Focuses on marketing investment rather than cost.

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

1

Implement this strategy now! Apply the tactics to your next listing using tools you already have in place and evolve it as you go.

2

Apply the strategy even if your listing goes under contract before it hits the open market. Don't use the excuse that your listing sold too quickly to skip applying the Viral Listing Strategy.

3

Use a system template to track the steps and so you can reapply the strategy to every listing you take. Use a simple Google Sheet or an Excel spreadsheet to get started.

6 Things Meredith Will Do

MOVING FORWARD

1

Apply the strategy to her expansion farm areas.

2

Leverage the strategy to recruit agents to her company.

3

Train the system and strategy components to all agents she recruits.

4

Implement innovative tech and ai as new products come onto the market.

5

Leverage the strategy to attract new referral partners and expand her network.

6

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

Meredith's TOOLKIT



NEW DIGITAL COMPANION
find the below toolkit items in

Revii™



The Listing Flywheel

An overview of the stages in Meredith's Viral Listing Strategy.

Make My Listing Famous Marketing System

Overview of Meredith's listing marketing system.

Seller Discovery System Intake Form

Example of Meredith's Seller Discovery Intake Form hosted in Google Forms.

Viral Listing Tech and Applications Stack

An overview of the technology and applications Meredith has embedded into her process.



THE ULTIMATE REAL ESTATE PLAYBOOK: LISTING ATTRACTION MULTIPLIER

Direct Mail Campaigns for Winning Your Audience

High Level Strategy and Detailed Tactics for Winning
with Mailers

**Judy
Michaelis**

 Coldwell Banker

 @judymichaelisrealtor



At a GLANCE

If direct mail is one of your lead gen pillars, sending a few nice postcards a month won't cut it. You need to be playing on a larger scale, running strategic mail campaigns to a large yet targeted audience. That's what Judy Michaelis does – and it's why she's achieved such incredible success.



**Westport,
Connecticut**

PRIMARY MARKET



\$1.6m

AVERAGE PRICE POINT



29

YEARS IN REAL ESTATE

PREVIOUS PRODUCTION STATS

26

TRANSACTIONS

\$48,000,000

SALES VOLUME

\$1,085,000

GCI

CORE CLIENTELE

✓ Rightsizing sellers

PRODUCTION

10% | 90%

Buyers | Sellers

TEAM

✓ Solo agent
✓ 3 staff members

Judy **ON COACHING**



My coach is an integral part of my business. He has given me the courage and confidence to 'play big' and invest in my business, and the payoff has been life-changing. Our sessions have accelerated my approach to marketing and thereby my business results. The 'I see you everywhere' mantra has really started to pay off, and my brand awareness has gone through an incredible evolution since I began coaching.



BY THE NUMBERS

25%

Of business is attributed to direct mail campaigns

8.5"x 11"

Standard mailer size

10,000

Homes in geo farm

10,000

Mailers sent to farm monthly

1,000

Mailers sent for each listing campaign

\$0.19

Cost per mailer delivered

\$4,500

Monthly budget for mailers





THE STORY

Before Judy Michaelis entered real estate and began dominating with her direct mail campaigns, she was in the world of finance. With a master's degree in taxation and experience as a CPA, she'd already built up the financial acumen that would empower her later career, but it wasn't until she underwent the process of purchasing her own home that Judy understood the potential of this industry. Right away, she knew that she could thrive here.

Initially, Judy embarked on her journey by collaborating with builders and new construction developers to secure listings. Instead of waiting for the market, she actively sought out opportunities – a strategy that proved fruitful. Before long, she diversified her efforts to encompass various resale avenues, continually expanding her horizons as her business grew. As a mother with younger children, Judy balanced her endeavors mostly on a part-time basis during this phase.

However, it was in 2014 that Judy fully immersed herself in the world of direct mail campaigns – and completely turned the tides of her career. She joined Tom Ferry (a decision that proved pivotal), and it was during this time that she encountered Josh Rubin, a staunch advocate of direct mail marketing. Intrigued by his success, Judy decided to test the waters in her own market. The notion gained additional resonance when her adult daughter, residing in New York, forwarded one of Josh's mailers to her. Judy found it immensely effective on her and knew that her own mailers could have the same effect on others.

She began modestly, targeting specific localities within her town, only to evolve and encompass a broader area over time. Central to her strategy was a consistent investment and reinvestment, gradually fine-tuning her approach. The initial year saw results, albeit on a smaller scale, with calls from interested parties. Although the branding wasn't as polished as her current standards, it marked the beginning of her direct mail journey. During the following years, 2016 and 2017, she decided to escalate by launching a full-fledged 10,000-mailer campaign. This phase demanded meticulous refining of the mailer design and a focused optimization of the messaging. Judy recognizes that direct mailers are an ongoing project, constantly evolving and improving as she gauges their effectiveness.



THE STORY

Judy attests that the impact of direct mail campaigns are cumulative, maintaining her presence in the minds of potential sellers. This consistent exposure engenders a sense of trust and reliability. By capitalizing on the psychology of familiarity, she can confidently generate valuable seller leads when the time is ripe. Remaining top of mind is a cornerstone of her strategy, amplifying brand exposure and frequently eliciting the remark, "I see you everywhere."



THE STRATEGY

MAILER CAMPAIGNS

- Form a strategic rhythm with a focus on consistency and relevance.
- Each month, Judy sends out a meticulously crafted mailer to her expansive farm of 10,000 individuals.
- Harmonize mailers with online efforts such as Instagram and YouTube.
 - Use targeted ads on these social platforms which synchronize with mailer themes.
- Always avoid generic content. Focus on personalized, trending topics.
 - Every mailer should have a point to convey.
- Plan up to three months in advance in order to cover the spectrum of themed campaigns such as market updates and the origins of buyers (which helps cultivate understanding).
 - Campaigns should always extend beyond sales and offer value.
 - Narrow in target audiences, such as downsizers or those looking to move within the same market.
- Adjust themes as market dynamics shift.
 - Judy is now catering to the post-peak market era.
- Showcase social proof while prompting homeowners to assess their property's worth in order to build trust and relevance.
- Offer a "home equity checkup" as part of an initiative to promote financial awareness in homeownership.
- Employ creative formats for mailers.
 - The "map mailer" offers visual insights into local real estate trends.
 - The "Who Do You Know?" campaign showcases voice and taps into personal connections.
 - "Just Sold" mailers celebrate achievements while emphasizing the process.

STAY CONSISTENT

- Consistency is key when it comes to direct mail.
- During the onset of the COVID pandemic, Judy temporarily faltered in upholding this crucial practice, resulting in a dip in production.
- Be unwaveringly committed to the investment it will require before showing results, even in a sluggish market.
- When the market slows down, most agents will be inclined to retract their efforts. But as Judy puts it: "When others choose to pivot left, I opt to pivot right." She fully believes that the long-term benefits of maintaining presence outweigh the costs.



THE STRATEGY

MAILERS FOR EVERY LISTING

- Employ a strategic mail approach for every listing, utilizing “Just Listed” and “Just Sold” mailers.
 - This has a dual impact of maintaining seller satisfaction while also spreading the word.
 - “Just Listed” mailers are the centerpiece of Judy’s marketing arsenal. For these, be sure all contents revolve around the core objective.
 - The “Just Sold” mailer serves as a post-sale triumph. Judy uses these to market herself and her own success.
- Target postal codes surrounding the listing.
- Send between 500 and 1,000 mailers within the vicinity of the property to ensure the message reaches the right audience.

MAILER SIZE AND QUALITY MATTER

- Judy uses “Every Door Direct” which brings her cost to just 19 cents per delivery across all markets and regardless of the mailer’s size.
- The quality and size of each mailer are carefully curated for optimal engagement.
 - 8.5 X 11 inches
 - The larger format is more visually appealing and more likely to be remembered. Smaller mail pieces can be easily dismissed.
 - Good quality card stock with glossy sheen.
- Clarity and simplicity are key.
 - Use white space to ensure a clean and uncluttered layout.
- Timeliness is crucial. Each mailer must have a timely and topical piece of information.

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

1

Be patient. Make sure you have enough resources to do it for a year without any leads.

2

Don't neglect the importance of saturation. Judy started with 2,500 homes, which was a sizable dent of the marketplace.

3

Pay attention to turnover rate. Make sure it makes financial sense – the general rule of thumb is that your turnover rate should be between 6-7%, depending on your sales price.

6 Things Judy Will Do **MOVING FORWARD**

1

Increase use of her seller-centric “Just-Listed” card.

2

Develop a brand-centric “Just-Sold” card.

3

Target Westport homeowners who’ve lived in their homes 30+ years with geo-farming and follow-up letters – going after downsizers with the intention of owning the downsizing market.

4

Expansion: Target Fairfield County (towns surrounding Westport) homeowners in areas she hasn’t targeted yet that have lived in their homes for 30+ years.

5

Focus more on drip mail, more CTA home valuation mailers.

6

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

Judy's TOOLKIT



NEW DIGITAL COMPANION
find the below toolkit items in

ReviiTM



Home Value Mailers

Examples of Judy Michaelis' Home Value mailers

Year-End Mailer

An example of Judy's year-end mailer.

Just Listed and Just Sold Mailers

Examples of Judy's Just Listed and Just Sold mailers

Informative Mailers

A collection of some of Judy's information forward mailers.

NOTES



UNLOCK THE SECRETS TO ONLINE LEAD CONVERSION WITH THE

ONLINE LEADS ACCELERATOR WITH CHRIS GIANNOS



ONLINE LEADS ACCELERATOR

**The Most Effective Way For Agents To
Maximize Online Lead Conversion**

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LEAD MANAGEMENT BEST PRACTICES

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CLOSE LIKE A LISTING LEADER

**HONE THE CRITICAL SKILLS NEEDED
TO TRANSFORM POTENTIAL OPPORTUNITIES
INTO SIGNED LISTING CONTRACTS.**

Learn the art of listening to client needs, overcoming objections, and confidently guiding conversations towards a successful agreement. By mastering these techniques, you'll build trust with prospective sellers, demonstrating your expertise and ensuring they choose you as their representative.

Chris Grant

Building Trust and Rapport from Beginning to End:
What to Do Before, During, and After the Listing Presentation

Stephanie Younger

Winning Listings: The Keys to a "Yes": The Training & Tools of a Listing Expert

Jillian & Keith Jamison

A Stunning Pre-Appointment Presentation to WOW Sellers:
How to Distill Your Brand into a Winning Presentation

THE ULTIMATE REAL ESTATE PLAYBOOK: THE LISTING EXPERT

Winning Listings: The Keys to a "Yes"

The Training & Tools of a Listing Expert

STEPHANIE
YOUNGER

COMPASS
@stephanieyoungergruop



THE ULTIMATE REAL ESTATE PLAYBOOK: THE LISTING EXPERT

Building Trust and Rapport from Beginning to End

What to Do Before, During, and After the Listing Presentation

Chris Grant

RE/MAX Anchor
@therealchrisgrant



THE ULTIMATE REAL ESTATE PLAYBOOK: THE LISTING EXPERT

A Stunning Pre-Appointment Presentation to WOW Sellers

How to Distill Your Brand into a Winning Presentation

Jillian &
Keith
Jamison

Lipply Real Estate
@jamisonteamtampabay





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At a GLANCE

For most agents, a listing presentation is their one big shot to demonstrate their expertise and build trust. For Chris Grant, a listing presentation isn't one block of time – it's a process that takes place before, during, and after the appointment itself.



**Southwest
Florida**

PRIMARY MARKET



\$400k

AVERAGE PRICE POINT



12

YEARS IN REAL ESTATE

PREVIOUS PRODUCTION STATS

235

TRANSACTIONS

\$100,000,000

SALES VOLUME

\$1,700,000

GCI

CORE CLIENTELE

- ✓ Investors
- ✓ Retirees

PRODUCTION

35% | 65%

Buyers | Sellers

TEAM

- ✓ 10 agents
- ✓ 5 staff members

Chris ON COACHING



Coaching kept me in this business when I was going to quit because I was so aggravated. My coach and I started with mindset, time blocking, tracking, and lead sources. This helped me stay focused on what was moving the needle and got me away from things that were killing my production. Accountability and networking have also been huge in helping my business continue to grow.



BY THE NUMBERS

65%

Of business is listings (2022)

80%

Listing taken ratio

1

Appointment set for every
7 conversations

2 / 14

Appointments set goal
per day/week





THE STORY

Around 2015 when Chris was four years into his career, he took a step back to seriously consider the elements of a great listing presentation. From there, he began field testing his presentation, incrementally improving it over time. He continued to reflect on what people in his market were looking for, and this reflection came to be essential.

As a straightforward and results-oriented listing agent, Chris clearly explains to future clients how he applies his expertise in all areas of the sales process – from marketing to negotiations to the transaction process. But most importantly, he communicates that customer care is the foundation of his business.

Movement toward the perfect presentation is rooted in listening to clients, incorporating their feedback, and continuously adapting to their needs. His listing presentation success is a result of what he does before, during, and even after the appointment is over. By understanding the most meticulous detail of the big picture, he has increasingly established himself as a listing leader.



THE STRATEGY

GETTING THE APPOINTMENT

- The first point of contact is the beginning of Chris' presentation. The key: ask the right questions upfront, foster a relationship, and start earning the business by providing value. His goal is to be the first agent to offer assistance and guidance to the potential seller.

TOP CTAs

- **Online lead:**

"Hi (blank), this is Chris Grant with RE/MAX. I see you just logged on via (source). I'm the preferred listing agent for (source) here in the area. I see you would like to sell your home located at (address). Let me ask you, ideally when would you like to have this home sold by?"

- **Referral:**

"Hi (blank), I was introduced to you by (blank) as I am the top selling agent here in (blank). Let me ask you, ideally when would you like to have this home sold by?"

- **FSBO:**

"Hi (blank), this is Chris Grant with RE/MAX here in (blank) and I'm calling about the home you just listed for sale on (blank). I see you are asking (blank). Let me ask you, if I could show you how you could net your asking price, would you be willing to meet me today at (blank) or tomorrow at (blank)?"

- **Expireds:**

"Hi (blank), this is Chris Grant with RE/MAX here and I'm calling because I see you were interested in selling your home on (blank). Let me ask you, when are you going to interview for your next agent who will be in charge of marketing and selling your home here?"



THE STRATEGY

BEFORE THE APPOINTMENT

- After booking the appointment, Chris immediately sends a personalized video message to better introduce himself. It conveys his personality and enthusiasm about the upcoming meeting.
- He sends an appointment reminder card, then lets them know his assistant will reach out to them beforehand to provide a friendly reminder.
- He sends a copy of his listing presentation and the complete listing package that he will discuss with them in person. This allows prospective clients the opportunity to familiarize themselves with the content and come prepared with any questions or concerns.
- On the morning of the appointment date, Chris and his team call those who are scheduled to ensure they are ready.

AT THE APPOINTMENT

- At the beginning of the appointment, he revisits and further explores the owners' goals, expectations, and priorities. He also inquires about any other real estate professionals they may be considering, and what their decision-making process will be.
- As the seller shows him the house, he pays close attention to how the clients talk about their property to learn what is important to them. He is never critical and only speaks about something if he has something positive to say. It's all about building rapport.
- Chris prefers to meet in the living room over the dining room as it can foster a more relaxed and open conversation.
- During the meeting, he lets the homeowners do most of the talking while he listens attentively to get a better understanding of the motivations and goals so he can understand how to align his services with their needs.



THE STRATEGY

MATERIALS

- Chris ensures that he has all the essential materials for his pitch, including his comprehensive listing presentation. This presentation encompasses crucial elements such as his marketing plan, which outlines the strategies he employs to effectively sell properties. In addition, Chris includes information about his total sales and highlights recent sales in the neighborhood, showcasing his success as a top agent in the MLS.
- Even while he provides printed materials, as most people tend to appreciate having tangibles, he also has digital copies if they prefer to use their phones or tablets.
- He discusses what is entailed in the disclosure form.

LISTING AGREEMENT

- Chris brings a physical copy of the listing agreement.
- He takes the prospective clients through it line by line, even if they're not ready to sign it. This ensures that when they are ready to proceed, they can immediately sign.
- When clients don't sign during the initial meeting, he schedules a follow-up during the meeting. The optimal time is immediately after the prospective clients have had their last meeting with other agents.

Chris' 3 Action Items **FOR SUCCESS**

1

Building trust and rapport before, during, and after the appointment by asking meaningful questions and active listening.

2

Do more than just set the appointment. Take advantage of your initial connection to learn everything you can about them, the move, their plans, and more to build rapport.

3

Everyone has an opinion on the timing of your listing presentation. Mine is to focus on getting in the door first so you can win the contract before other agents even have a chance.

6 Things Chris Will Do **MOVING FORWARD**

1

Update his presentation and layer in new offers as they relate to the current market (ex., concierge for hurricane damage, home watching program).

2

Review other agents' presentations and implement new ideas.

3

Role-play listing presentation with team.

4

Test/track success as they tweak their process.

5

Update recent sales/testimonials quarterly.

6

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

Chris' TOOLKIT



NEW DIGITAL COMPANION
find the below toolkit items in

ReviiTM



Listing Presentation

The Grant Team's listing presentation.

Video Message Example

Example of video messages Chris sends to listings leads.

Listing Agreement Checklist

The Grant Team's checklist of listing agreement items.

Photography and Showing Checklist

The Grant Team's checklist for photography and showing action items.

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STEPHANIE
YOUNGER

 COMPASS

 @stephanieyoungergroup



AT A GLANCE

Operating a "Listing Specialist" business model, every listing expert on Stephanie Younger's team can give a presentation and carry the process through to close just as well as she can. That's because Stephanie has crafted such a well thought-out process and comprehensive training that anyone can master it if they follow her guidance.

 **West Los Angeles, California**
PRIMARY MARKET

 **\$1.5M**
AVERAGE PRICE POINT

 **22**
YEARS IN REAL ESTATE

PREVIOUS PRODUCTION STATS

288 TRANSACTIONS	\$340,000,000 SALES VOLUME	\$8,100,000 GCI
----------------------------	--------------------------------------	---------------------------

TOP LEAD SOURCES
✓ Past Clients- 28%
✓ SOI - 20%
✓ Geofarm - 20%

PRODUCTION
47% | 53%
Buyers | Sellers

TEAM STRUCTURE
✓ **37 agents**
✓ **12 staff members**

Stephanie ON COACHING



I have always believed deeply in training, coaching, and accountability; I have always maintained a strong mindset and a disciplined approach to business. Prior to joining TF coaching, I was thinking big however my capacity for growth was constrained. I realized I was missing the insight into the strategies, systems and practices that worked in other markets, and most importantly for other large teams and other team leaders. Tom Ferry, our coach, and the TF Ecosystem have given me **exposure to new strategies, emerging ideas and opportunities and most importantly, the kind of people and other team leaders that I could truly learn from.**

My mindset and discipline remain strong; but **my business has become more strategic, more professionalized, and more systematized since I joined Tom Ferry Coaching.** I could not be happier with the changes I've made and the opportunities that lie ahead!



BY THE NUMBERS

18.75

Hours per month performing pre-appointment interviews

25

Listing appointments met per month

63%

Conversion rate for appointment-to-listing taken





THE STORY

In 2016, Stephanie Younger knew that if she was going to reach her goal of taking 100 listings, she was going to need to go on 200 listing appointments. This, she soon found, was extremely labor-intensive and unsustainable.

She needed a listing team – but not just any team of agents...**She needed a team of listing specialists who could conduct listing appointments at her level.** This new strategy allowed for a more focused and efficient workflow. As business continued to come in, she had to continue expanding her team. Today, her team boasts four full-time listing agents, with Stephanie herself accounting for just 10% of the overall business.

As a result of their brand recognition, the team has continued to expand and develop. And now, Stephanie and her team of Listing Specialists have opened up opportunities for more agent partners to become “certified in the SYG Way” in order to join them in taking listings.

To ensure consistent success in securing listings, Stephanie created a training program, a set of standard operating procedures (SOPs) and a listing presentation so compelling that it inspires not only clients but agents. Every tool and resource is crafted that any new member to her team could undergo her training and walk away as a listing expert.

The secret to the success in the transference of Stephanie’s listing skills is the belief that the “Listing Presentation” as we know it is no longer enough. Stephanie has created a Three Step Seller Consultation that builds rapport, ensures the agent is viewed as a trusted advisor, gets the listing and most importantly, accomplishes the seller’s goals and gets the home sold!

Through years of experience, strategic growth, and the refinement of their listing presentation process, Stephanie Younger and her team have positioned themselves as trusted leaders in the real estate industry. Their commitment to excellence and continual improvement continues to propel their success in securing listings and satisfying their clients' needs.



THE STRATEGY

STEP ONE: THE SELLER INTAKE PHONE CALL

The pre-appointment qualifying process begins right from the first contact on the Seller Intake Phone Call. The team has created a Seller Lead Questionnaire that not only obtains essential contact information but details the client's wants, needs, and motivations.

- The team aims to gather as much information as possible to understand the lead's needs, goals, and expectations for the transaction.
- The goal is that any agent could step in and ask questions on behalf of another agent and still gain a full understanding.
- It's important to the strategy that this qualifying process be done over the phone.
 - This way, the client can freely respond to the questions, while the agent details the responses into the form.
- Actively listen and create a low-risk environment for leads to freely express their thoughts and opinions about their home.
 - This dialogue allows the clients to reveal important details such as other professionals they may be considering and the necessary preparations for their home before listing.
- Questions are asked by the listing agent or one of the listing partners rather than an ISA or receptionist. This allows them to offer a warm reception while also collecting details before physically visiting the property.
- Use a Google Sheet as the interview form.
 - Some agents may choose to handwrite the information during the call and then enter it into the Google Form later.
 - Collected data is then integrated into Follow Up Boss, Stephanie's CRM.
- Stephanie and her team are willing to spend anywhere from 30 minutes to an hour during the intake interview.
 - Investing more time during the initial phone call increases the likelihood of converting the potential client into a listing.
- Critical to the process, both parts of the Listing Appointment - the 15-Minute Walkthrough and the following Seller Strategy Meeting - are scheduled during this phone call as well.



THE STRATEGY

STEP TWO: THE 15-MINUTE WALK THROUGH

Schedule this meeting at the end of the Seller Intake Call. Inform the Client that this is strictly for you to view the home. Explain it takes around 15 minutes to walk through the house, take photos, and understand the layout in order to determine pricing.

- Emphasize the importance of seeing the house first, as it wouldn't be fair otherwise.
- Let them know that all decision makers DO NOT need to be present! This is just a viewing!
- Conduct a tour of the client's home.
 - Walk through, take photos. Compliment the home. Show appreciation for the home and reserve all judgment.
- Refrain from discussing price or terms. Let them know that you will cover all of that at the Seller Strategy Meeting.
- Confirm the date and time of the seller strategy meeting. Make sure that all decision makers will be present for this meeting. This is the part of the process that is your "traditional Listing Presentation."
- Prepare your CMA, your Process overview and Marketing Presentation.
- Upon arrival, here are a few Pro Tips:
 - If the client has a dog, Stephanie always acknowledges the furry friend first to establish rapport.
 - Always remember to ask if shoes should be removed before coming inside.
 - Allow for relaxed and genuine interaction, but keep in mind they might be eager and excited to dive into the details.
- Sit at the Dining Room Table. Stephanie prefers to sit next to one of the sellers and across from the other, rather than across from both. During the sit-down:
 - Review key points discussed during the phone call, aiming to align desires, timing, and goals. Get agreement on important points from both parties.
 - Stephanie emphasizes the importance of slowing down, being fully present, and actively listening.
 - Commit to going through your entire presentation every time.



THE STRATEGY

STEP THREE: THE SELLER STRATEGY MEETING

This is the part of the process that is your “traditional” listing presentation. Prepare your CMA, your Process overview and Marketing Presentation.

- Upon arrival, here are a few Pro Tips:
 - If the client has a dog, always acknowledge the furry friend first to establish rapport. If the dog loves you, so will the client!
 - Always remember to ask if shoes should be removed before coming inside.
 - Allow for relaxed and genuine interaction, but keep in mind they might be eager and excited to dive into the details. Stay on point!
- Sit at the Dining Room Table. Stephanie prefers to sit next to one of the sellers and across from the other, rather than across from both.
- During the sit-down:
 - Review key points discussed during the phone call, aiming to align desires, timing, and goals. Get agreement on important points from both parties.
 - Stephanie emphasizes the importance of slowing down, being fully present, and actively listening.
 - Commit to going through your entire presentation every time. This is a job interview and you might not get a second chance.

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

1

Be committed to giving your complete presentation. Be sure to include the market data and overview of your service and Unique Value Proposition (UVP).

2

Understand the owner's needs. Ask lots of questions – don't be afraid to ask questions, they will tell you more than you think they will

3

Charge your full fee! And make sure you are adding value that commands it.

6 Things Stephanie Will Do

MOVING FORWARD

1

Update the Listing Specialist curriculum and training to address the changing rules of Agent Compensation.

2

Execute an update to her training. The 2nd Bootcamp of 2024 will be recorded and she will turn this into video training modules.

3

Create a Flipped Classroom Training Program: Agents will watch the modules on their own, complete assignments and come to the sessions prepared to present and roleplay.

4

Build an add-on program for "Listing Conversion" Training.

5

Create a modified version of our training program that can be available to agents outside of our organization.

6

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

Stephanie's TOOLKIT

NEW DIGITAL COMPANION
find the below toolkit items in

Revii™



Seller Intake Questionnaire

An example of Stephanie's Seller Intake Questionnaire used during the initial contact with the listing lead.

Seller Intake Questionnaire Script

An excerpt of the script Stephanie's team uses during the initial Seller Intake call.

Listing Agent Training Overview

An overview of Stephanie's 12-week Listing Agent Training.

NOTES

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How to Distill Your Brand into a Winning Presentation

**Jillian &
Keith
Jamison**

 Lipply Real Estate

 @jamisonteamtampabay



At a GLANCE

What you say and show at your listing appointment is essential, but for Jillian and Keith Jamison, it's the presentation they send before the listing appointment that establishes them as the team of choice. Their comprehensive Highnote presentation solidifies their brand as the tactical experts of their geo farm.



**Tampa Bay,
Florida**

PRIMARY MARKET



\$375k

AVERAGE PRICE POINT



12

YEARS IN REAL ESTATE

PREVIOUS PRODUCTION STATS

90

TRANSACTIONS

\$33,715,673

SALES VOLUME

\$798,000

GCI

CORE CLIENTELE

- ✓ Wide-range
- ✓ Upsizing families

PRODUCTION

60% | 40%

Buyers | Sellers

TEAM

- ✓ 4 agents
- ✓ 1 staff member

Keith & Jillian **ON COACHING**



Joining Tom Ferry coaching has been a game changer for us. Our coach's expertise and accountability have been invaluable. Learning from other top producers around the world has been eye opening in helping us realize our full potential. Tom's knowledge and ability to stay ahead of the curve helped us not only get through the challenging times during the pandemic but truly excel. We were able to multiply our business by 4.5x from 2019 to 2021. We are forever grateful to our coach and the entire Tom Ferry ecosystem.



BY THE NUMBERS

90%

Conversion rate on listing appointments

2

Listing appointments per week goal for team





THE STORY

Jillian and Keith Jamison are the hyperlocal experts of their geo farms. Whenever someone thinks of one of these neighborhoods, they think of the Jamisons – it's their brand, and they've been able to leverage it into increased listings by distilling that entire brand into a powerhouse presentation.

But before they were the listing experts they are today, Jillian was working an unsatisfying job at a bank. She knew she was meant to do sales, so in 2012 when a family friend reached out to her about entering real estate and joining her team, Jillian jumped on it. While the structure of the team was primarily focused on lead distribution, it offered Jillian a platform to let her talents shine and to sculpt her skills in real estate. With every experience, she gleaned valuable lessons, adapting and evolving, her innate ambition and talent radiating brighter with each passing day. A pivotal moment arrived in 2017, presenting Jillian with the opportunity to step into a leadership role as the team leader embarked on a new journey. With grace and confidence, Jillian embraced the responsibility, ready to infuse the team with unity, support, and a shared vision.

By the close of 2019, Jillian honed in on listing and geo-farming as a strategic focus, a decision that yielded immediate and enduring results. Since then, the Jamison team has consistently harnessed the power of geo-farming to drive their listing success and show no signs of slowing down.

In early 2020, Keith joined Jillian in her real estate career and they created the Jamison Team as it is today. The Jamisons employ an Operations Manager who has been instrumental in their business growth and has allowed each member of the team to focus on their core competencies. The Jamison team's commitment to innovation and adaptability has enabled them to remain at the forefront of the industry.



THE STRATEGY

THE LISTING APPOINTMENT

- Focus on appointments within the targeted geographical zone.
 - Jillian and Keith are known for their joint presence within the community. Their presence as a unit enhances their reputation and establishes a sense of trust.
- Use a Highnote presentation to proactively share comparable property information before the appointment. (Example in the Toolkit!)
 - This includes a specialized video tailored to the selling process within the specific neighborhood, emphasizing their residency and local expertise.
 - This video serves as a high-level marketing plan, outlining their approach and strategies.
 - Jillian and Keith are able to track data analytics from the video in order to see who has watched it or rewatched it. This helps them determine who is serious, who they may need to spend more marketing dollars on, and how much they'll need to explain during the appointment.
- Another part of their Highnote presentation is a comprehensive selling guide which offers insights into the process, answers questions, and alleviates concerns.
- A sample listing video and property page are also included. These examples demonstrate their marketing prowess, technical capabilities, and dedication to showcasing homes in the best possible light.
- To cap off the listing appointment, Jillian and Keith present a sample listing agreement, giving potential clients an overview of the contractual aspect of their collaboration.

HITTING ON THE MOST VALUABLE POINTS

- The highly structured listing appointment begins with a property tour alongside the sellers.
 - During this tour, bring the clients through some of the details that will be discussed later.
 - Inquire about the most comfortable space within the home, allowing the client to choose the conversational setting.



THE STRATEGY

- Begin the conversation with property comparisons.
 - The Jamisons usually have an understanding of the client's pricing expectations, obtained through pre-appointment phone calls.
 - Utilizing Zillow as a reference point, address the client's familiarity with the platform's data.
 - Collaborate with the client to determine an appropriate price while providing transparent explanations.
- Transition the discussion to netsheets to offer a financial overview.
- Next, go into the marketing aspects.
 - Advocate the significance of professional photography and highlight the essential role that listings videos and SEO play in maximizing property visibility.
 - A standout feature of their approach is the creation of HGTV-style listing videos, which captivate potential buyers and differentiate their marketing strategy.
 - The Jamisons emphasize the effectiveness of in-stream advertisements, detailing instances where their listing videos have amassed over 2,000 views.
 - Postcard examples are shown, reinforcing yet another crucial strategy.
 - Highlight that staging is essential.
 - During this stage, the Jamisons bring a professional stager to do a walking tour of the home with the client, showing them how to arrange existing furniture to make it look like a model home.
- Finally, the listing agreement is presented again.
 - Note that it has already been previewed through the Highnote presentation, but it is now examined in detail.
 - Foster an open dialogue about payment structures and rationale while ensuring compensation.

LEAVING THE APPOINTMENT

- As the appointment concludes, express gratitude for the client's time and engagement.
- Outline the next steps in case the clients decide not to sign at the appointment, which involves sending the necessary documentation through Docusign for their review.
- Ask whether it'd be suitable to follow up the next day in order to uncover their level of interest.



THE STRATEGY

- In line with their low-pressure approach, the Jamisons give clients space to thoroughly examine the documents after the meeting.
 - A few hours later, the team forwards the documents via Docusign, facilitating a seamless and convenient process.
- A follow-up plan is scheduled for clients who might be in the early stages of considering to list.
 - These clients are added to a weekly newsletter and are extended invitations to client events, fostering ongoing engagement.
- Set up neighborhood-specific property searches to keep past clients informed about the local real estate scene and stay updated on new listings.
- Add all potential clients on social media.
 - The Jamisons primarily focus on Facebook.
- Even when clients remain on the prospect list, the team ensures they benefit from personalized attention, including pop-bys.
 - Touch base with potential clients but not too frequently, so you don't overwhelm them.
 - Treating prospects as past clients often yields referrals.

Keith & Jillian's 3 Action Items **FOR SUCCESS**

1

Have a strong, consistent brand. The Jamisons are the brand of the neighborhood, and their consistency is reinforced at the listing appointment.

2

Bring the marketing knowledge and be the expert. Look at the homes. Stop by local Open Houses. Tour new constructions.

3

Know the comps in your market well. They often call out the comps they have sold.

6 Things Keith & Jillian Will Do

MOVING FORWARD

1

Stay consistent with what they already have in place.

2

Start doing neighborhood events.

3

Choose a neighborhood and expand into a new, third farm area.

4

Professional video tour of both neighborhoods.

5

Find a new marketing avenue (bus bench, billboard, etc.).

6

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

Keith & Jillian's TOOLKIT

NEW DIGITAL COMPANION
find the below toolkit items in

Revii™



Overview of Listing Presentation

Overview of all of the elements of the Jamisons' pre-listing presentation. Hosted in Highnote.

NOTES



PROSPECTING BOOTCAMP

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ATTRACT LIKE A LISTING LEADER

DRAW IN MORE LISTING BUSINESS AND ENHANCE YOUR APPEAL TO POTENTIAL SELLERS, POSITIONING YOU AS THE AGENT WHO CAN DELIVER EXCEPTIONAL RESULTS.

Learn how to establish a strong personal brand, utilize innovative marketing tactics, and engage with your community effectively to become the agent sellers are eager to work with.

Ryan Adams

Being the Mayor of the Farm: Reaching Every Person in Your Geo Farm

Mikki Ramey

Sphere Growth: \$0 to \$200K with Online Leads:

The Formula for Nurturing Lifelong Client Relationships

Jenny Hensley

How I 4X'd My Business: The Secret to Skyrocketing Success:

The Power of Genuine Connection

THE ULTIMATE REAL ESTATE PLAYBOOK: THE REFERRAL PIPELINE

The Best ROI in Real Estate: 1 Lead = \$100K GCI

Online Lead Nurturing for Rapid Database Growth

MIKKI
RAMEY

Healthy Realty
@movingwithmikki



THE ULTIMATE REAL ESTATE PLAYBOOK: LISTING ATTRACTION MULTIPLIER

Being the Mayor of the Farm

Reaching Every Person in Your Geo Farm

Ryan Adams

Compass
@theadamsgroupptx



THE \$200K REAL ESTATE PLAYBOOK: THE REFERRAL PIPELINE

How I 4X'd My Business: The Secret to Skyrocketing Success

The Power of Genuine Connection

JENNY
HENSLEY

Luxe Residential LLC
@jennyhenz



THE ULTIMATE REAL ESTATE PLAYBOOK: LISTING ATTRACTION MULTIPLIER

Being the Mayor of the Farm

Reaching Every Person in Your Geo Farm

Ryan Adams



Compass



@theadamsgrouptx

At a GLANCE

Ryan Adams used to rely on online leads. But as his team grew, he imagined what would happen if instead of buying leads, he could buy in to the entire community. Today, Ryan is the face of his geo farm. He sponsors all kinds of community events, hosts his own events, sends postcards, has his team door knocking, and runs Open Houses like a master.



**Houston,
Texas**

PRIMARY MARKET



\$500k

AVERAGE PRICE POINT



6

YEARS IN REAL ESTATE

PREVIOUS PRODUCTION STATS

122

TRANSACTIONS

\$48,000,000

SALES VOLUME

\$1,300,000

GCI

CORE CLIENTELE

- ✓ Downsizing
- ✓ Upsizing

PRODUCTION

58% | 42%
Buyers | Sellers

TEAM STRUCTURE

- ✓ **7 agents**
- ✓ **5 staff members**

Ryan ON COACHING



The biggest thing for coaching with me has been the accountability. If I'm not hitting my goal, I've got to tell my coach. Then we need to figure out the problem. It could be the lead sources or the actions I'm not taking. It's my coach and I pulling out the drawing board asking what I need to do. I have someone that's looking at my business every week and looking for those blind spots and what I can do to fix them.



BY THE NUMBERS

9x

ROI on geo farming activities

25%+

Of business attributed to geo farm pillar (2022)

10,000

Homes in geo farm

5,000

Postcards deployed a month

22

Open Houses held in 2022

11+

Community and appreciation events put on annually

\$50,000

Geo farm marketing budget (2023)

\$450k

GCI goal for geo farm (2023)

Ryan's total business attributed to his geo farm activities has increased significantly -

PRODUCTION YEAR	TOTAL SALES VOLUME	SALES FROM GEO FARM	% OF TOTAL PRODUCTION
2021	36	4	11%
2022	52	13	25%
2023 YTD	29	11	38%



THE STORY

When Ryan entered real estate in 2017, he didn't dive in without a plan. For the first year-and-a-half he focused on establishing best practices for running a successful real estate business – and ultimately starting a team. In regard to leads management, he initially developed processes around online leads, which constituted 90-95% of his business.

Toward the end of 2018, as Ryan was taking steps to bring team members on board, he also resolved to increase his lead sources and create a long-term sustainable business model by incorporating geo farming.

For all of 2019, he made inroads into a local community, but it was 2020 when he decided that, if he was really going to make an impact, he would have to allocate significantly more marketing dollars to his geo farm – while at the same time developing new systems to reach more people, both physically and online.



THE STRATEGY

COMMUNITY INVOLVEMENT

- Ryan's geo farm complements his lifestyle and sphere of influence (SOI). Located close to his home, he makes a point to be involved in various local clubs, boards, and groups.
- Because his children are involved in so many school and extracurricular activities, he connects with parents as well as teachers and other youth leaders.

OPEN HOUSES

- Holding Open Houses in a community that already knows your name is super effective for building brand recognition. Besides averaging three open houses a month in the farm, his team aims for at least one Mega Open House per quarter.
- To get more contact with the community, they door knock surrounding properties.
- To maximize publicity in the farm, they put up as many as 50 Open House signs throughout the community!

COMMUNITY SPONSORSHIP

- Ryan sponsors youth sporting events, school functions, and a variety of other community events. As much as possible, Ryan wants to be the top sponsor.
- They also support charities with the input of the community. Everyone gets to nominate and then vote on which charity to support each quarter.

ONLINE PRESENCE

- The team Facebook Group of 8000+ members focuses on promoting local businesses rather than real estate.
- On top of their standard listing announcements, they also produce a monthly market update on YouTube that focuses on their geo farm. They get between 6,000 and 10,000 views on their videos in a community of just over 10,000 homes!



THE STRATEGY

EVENTS

- As a matter of strategy, Ryan chooses to consistently host more small events throughout the year rather than focusing solely on the larger, more splashy events. These include:
 - Community events (the goal is to participate in all of them)
 - Five pop-up events each year
 - Annual client appreciation event
 - Happy hour seminars – Two for seller and five for buyers

POSTCARDS

- Ryan sends 2,500 postcards twice a month using Every Door Direct Mail (EDDM). The recipients are selected based on high seller scores identified through platforms like Remine and PropertyRadar.
- Postcards have CTAs and include QR codes to drive traffic to their website and capture contact information.

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

1

Be consistent and be patient, understanding that each year adds more exposure.

2

While you need to promote your brand in a number of ways, you don't have to start with everything at once. To keep costs down, consider starting with community events rather than something like postcards.

3

Build a marketing plan for your farm. Schedule out your marketing activities for the entire year.

6 Things Ryan Will Do **MOVING FORWARD**

1

Add two more pop-up events this year.

2

Conduct mega weekend Open Houses.

3

Produce more YouTube market reports and listing videos, targeting ads toward the geo farm.

4

Conduct circle prospecting after Just Solds, Just Listed, and Open Houses.

5

Add more CTA postcards this year to build long term nurture leads.

6

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

Ryan's TOOLKIT



NEW DIGITAL COMPANION
find the below toolkit items in

Revii™



Event Promotion Examples

Examples of the invitations for some of Ryan's community and client events.

Examples of QR Postcards

Example of Ryan's mailer that includes a QR code to home valuation and contact forms.

Top Performing YouTube Videos


List of some of Ryan's top performing YouTube videos.

THE ULTIMATE REAL ESTATE PLAYBOOK: THE REFERRAL PIPELINE

The Best ROI in Real Estate: 1 Lead = \$100K GCI

Online Lead Nurturing for Rapid Database Growth

MIKKI
RAMEY

 Healthy Realty

 @movingwithmikki



AT A GLANCE

Mikki Ramey's strategy focuses on cultivating lifelong clients by prioritizing exceptional service and relationship-building from the outset. For her, the initial transaction marks the start of a potential long-term partnership.



**Charleston,
South Carolina**

PRIMARY MARKET



\$600k

AVERAGE PRICE POINT



17

YEARS IN REAL ESTATE

PREVIOUS PRODUCTION STATS

180

TRANSACTIONS

\$94,500,000

SALES VOLUME

\$2,438,252

GCI

TOP LEAD SOURCES

- ✓ SOI - 42%
- ✓ Past Clients - 13%
- ✓ Online leads - 9%

PRODUCTION

70% | 30%
Buyers | Sellers

TEAM STRUCTURE

- ✓ 20 agents
- ✓ 4 staff members

Mikki ON COACHING



Before I became a realtor, I was a teacher. Quite literally, I knew nothing about running a business. Coaching with Tom Ferry has transformed my career. **After joining Tom Ferry Coaching I have grown my team of 5 to a team of 20 agents and staff!** We now have excellent agents who have a desire to grow and improve their skills daily. Our systems have improved as a direct result of coaching and our numbers show it. **We are well on our way to break \$100M in sales volume this year. If you want mediocrity, just stay where you are. If you want big results in your business, you need Tom Ferry Coaching!**



BY THE NUMBERS

68

Contact points with database per year

\$400,200

GCI generated from strategy in (2023)

3,136

Online lead contacts added to database (2023)

\$100,000+

GCI generated from a single online lead relationship





THE STORY

It was one client that changed the course of Mikki Ramey's career. It started with an online lead from Zillow, and in 2012, she earned a \$11,000 commission when she helped the Ramsey family find their perfect beachfront getaway for \$440,000. Mikki paid Zillow their share and proceeded to follow up diligently, maintaining a relationship with the family. **In the years to follow, this single lead turned into four transactions and nearly \$100,000 in earned commission.**

Lesson learned? **Consistent follow-up has the potential of turning a single transaction into a series of profitable deals.** This approach has transformed Mikki's business and established her as a leading figure in the industry.

In the competitive world of real estate, Mikki Ramey has consistently achieved 6 figure results from her stellar long-term online lead nurture strategy. Her approach revolves around the concept of investing beyond the initial transaction. "Always be willing to pay for an opportunity to create a lifetime client," says Ramey. This mindset has driven her remarkable success and yielded extraordinary results.

Mikki's strategy goes beyond the initial transaction cost, which she views as an investment. Zillow leads now cost about \$1000 each in her area, but she continues to invest because she understands the long-term value. "The first transaction is just the beginning," she notes. **"Loving on your online leads after closing is the absolute best ROI in real estate."**

Mikki Ramey's story is a testament to the power of persistent engagement and the rewards of nurturing long-term relationships. By focusing on the lifetime value of her clients, she has unlocked incredible growth and success, setting an example for real estate professionals everywhere.



THE STRATEGY

INVEST BEYOND THE INITIAL TRANSACTION

Treating your first client interaction as if it sets the tone for a long-term relationship is crucial because it establishes the foundation for trust, satisfaction, and potential referrals. A positive initial experience can lead to continued business growth and loyalty, showcasing your commitment to delivering exceptional service from the start.

- Understand long-term client value.
- Pay for quality leads.
- View each lead as a future investment.
- Aim for multiple transactions per lead.
- Recognize long-term client potential.

LEVERAGE THE FIRST TRANSACTION

To build a successful business strategy, start by expanding on initial agreements to deepen relationships. Focus on building trust and reliability through consistent delivery. Offer complementary services to add further value. Encourage referrals from satisfied clients and utilize their success stories in promotional efforts to attract new business. These steps form a cohesive approach to growth and client retention.

- Treat initial deals as the start of a relationship.
- Build trust and reliability.
- Offer complementary services.
- Encourage referrals.
- Highlight client testimonials.

USE TECHNOLOGY AND AUTOMATION

Automation and technology play a crucial role in Mikki's strategy. Tools like Vyrat help her develop engaging content, while AI solutions like Maverick provide insights into client engagement. YLOPO's Home Valuation system adds extra touchpoints, cementing Mikki's role as a trusted advisor.

- Employ tools like Follow Up Boss.
- Develop content with Vyrat.



THE STRATEGY

- Analyze client engagement with AI.
- Use YLOPO for additional touchpoints.
- Maintain a structured nurture sequence.

ONGOING FOLLOW-UP AND ENGAGEMENT

Her comprehensive 18-month nurture strategy includes 68 touchpoints, ensuring clients feel consistently valued. Using Follow Up Boss, Mikki tracks interactions meticulously, maintaining a high level of engagement. Her personalized communications range from video newsletters to home valuation reports, demonstrating her dedication to client satisfaction.

- Communicate regularly.
- Personalize messages and interactions.
- Utilize CRM tracking systems.
- Show appreciation through gifts and gestures.

MAXIMIZE ROI

Track client lifetime value to understand their long-term contribution. Reinvest earnings strategically to nurture client relationships and enhance satisfaction. Optimize marketing tactics to attract and retain high-value clients, focusing on activities that yield significant returns while avoiding unnecessary expenditures.

- Be willing to pay for the right leads
- Calculate lifetime client value.
- Eliminate unproductive spending.

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

1

Commit to paying for initial lead opportunities and commit to follow up after closing.

2

Put systems that you will use in place! Use a CRM daily and consistently.

3

When buying online leads, make sure your process prioritizes calling quickly to set an appointment.

6 Things Mikki Will Do

MOVING FORWARD

1

Continue to implement strategies to encourage repeat business and referrals, such as offering complementary services.

2

Audit her current client list in an effort to identify clients that have the potential for longevity.

3

Continue to stay abreast of current and emerging technologies, both in and out of the real estate space.

4

Regularly solicit feedback from clients to understand their experience and identify areas for improvement.

5

Build relationships with other professionals in the industry, such as mortgage brokers, home inspectors, and lawyers.

6

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

Mikki's TOOLKIT

NEW DIGITAL COMPANION
find the below toolkit items in

Revii™



Breakdown of Long-term Contact Sequence

Overview of each of Mikki's contact sequence components and tips for connecting with past clients.

Monthly Text Newsletter Example

An example of Mikki's text-based emails that go out to her database twice a month.

Market Update Video Newsletter Example

An example of Mikki's video-based emails that go out to her database twice a month.


THE \$200K REAL ESTATE PLAYBOOK: THE REFERRAL PIPELINE

How I 4X'd My Business: The Secret to Skyrocketing Success

The Power of Genuine Connection

JENNY
HENSLEY

 Luxe Residential LLC

 @jennyhenz



AT A GLANCE

Jenny Hensley is a top-selling agent in Raleigh, NC. Her strategic focus is on consistent nurturing of her sphere of influence, which she does through supporting small businesses and making gift baskets of local goods for each of her clients. Her goal at this stage in her career is that when clients hear the name "Jenny Hensley," they should instantly associate it with care and trust.



**Raleigh,
North Carolina**

PRIMARY MARKET



\$860K

AVERAGE PRICE POINT



9

YEARS IN REAL ESTATE

PREVIOUS PRODUCTION STATS

22

TRANSACTIONS

\$17,629,200

SALES VOLUME

\$422,440

GCI

TOP LEAD SOURCES

- ✓ Referrals - 50%
- ✓ SOI - 27%
- ✓ Other - 23%

PRODUCTION

49% | 51%
Buyers | Sellers

TEAM STRUCTURE

- ✓ Solo agent
- ✓ 1 staff member

Jenny ON COACHING



Joining TF coaching has completely transformed my business in just a year and a half. Before our weekly coaching calls, my daily schedule was disorganized, I didn't have the tools necessary to track leads, and I had no idea if my business was profitable. **Coaching provided the much-needed structure to my daily schedule and has completely changed my mindset towards success. I now have a clear vision of what's ahead, and methods to sustain measurable growth.** I rely on my coach for personal and professional guidance, accountability, and ways to navigate industry shifts. To say that I am grateful for this relationship, would be a sore understatement. The value it's brought to my life is truly amazing, and I'm excited for more to come!



BY THE NUMBERS

97%

of business comes from referrals
and past clients (2023)

86%

of her initial buyer clients use her
for the future sale of their home

51x

ROI on Pop By Strategy





THE STORY

Meet Jenny Hensley, a real estate agent in Raleigh, NC, who started this journey by taking a deep dive into the history of her business. What she and her coach discovered was that an astounding **97% of her business has come from her referrals and past clients**. This revelation inspired her to take a new approach to nurturing her Sphere of Influence (SOI). She then formulated **a comprehensive strategy centered around building lasting relationships and offering a personalized experience to every client who signs with her**.

Jenny is a high-achieving agent, and has been the top selling agent at her firm for two consecutive years. She also ranks among the Top 500 Agents in Raleigh according to Real Producers. Additionally, Jenny is a Guild Member of the Luxury Institute for Home Marketing. Since joining coaching in 2002, she has consistently doubled her Gross Commission Income (GCI) and sales volume, with the average price point of her transactions rising from \$610K in 2022, to \$720K in 2023, and \$860K in 2024.

Integral to Jenny's success is her strategic approach to establishing accessibility and trust, which includes meticulous planning to ensure that every move aligns with her business goals, market movements, and client needs. Her strategy also includes a detailed marketing and social media plan that complements her gifting efforts.

One of Jenny's defining services are her client gifts. Each basket, tailored to individual clients, contains high-quality items sourced from local businesses in their new neighborhood. This strategy not only keeps her top of mind when clients are asked for recommendations, but it also engrains her in the local communities in which she works most.

Jenny's systematized approach to client relationships sets a benchmark in the real estate industry. By focusing on personalized care and strategic planning, she has built a thriving business that continually grows through referrals and repeat clients. Her story is a powerful reminder that success in real estate is built on relationships and genuine care.



THE STRATEGY

PRIMARY FOCUS ON RELATIONSHIP BUILDING

An emphasis on nurturing connections through personal networks and close relationships, without relying on purchased leads. Regular face-to-face meetings often include local tokens of appreciation to enhance trust and accessibility.

- All leads are generated through personal connections and SOI.
- No paid leads.
- Regular in-person check-ins that include local gifts.
- Prioritize trust and accessibility in relationships.

DETAILED BUSINESS PLANNING

Thorough planning is a cornerstone of operations, with strategies laid out a year in advance. Thoughtful gestures and tailored interactions are strategically incorporated to align with business objectives.

- Business planned a year in advance.
- Strategic gifting and contact points based on business, audience, and market movements.
- Schedules purchases, videographers, and content creation.

MARKETING AND SOCIAL MEDIA INTEGRATION

The marketing strategy seamlessly integrates with the social media presence. A comprehensive social media strategy documents every step of thoughtful gestures, focusing on compelling visual narratives and actively engaging with the community.

- Corresponding social media plan that captures each step of the gifting process.
- Emphasis on visual storytelling and community engagement.



THE STRATEGY

POP-BY GIFTS - PERSONALIZED AND HIGH-QUALITY GIFTING

Unique and locally sourced gifts ensure that each client is wowed by the level of personalized service they receive from Jenny.

- Gifting items are sourced from local businesses and vendors.
- Each client receives a unique, personalized gift basket.
- Avoid gifting during predictable times like December.

CONSISTENCY AND ACCESSIBILITY

Consistency is key across communication channels, including email, social media platforms, and personal visits. The aim is to create a feeling of being easily accessible to clients, fostering a sense of closeness and importance in relationships.

- Maintaining a consistent presence through email, social media, and in-person visits.
- Creating a feeling of being 'just a short drive away' for clients.
- Consistent presence via various channels.
- Ensures clients feel valued and connected.

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

1

Get organized & create a plan! Set time to focus and write it down. You can't make it sustainable if it's all last minute.

2

Learn how to leverage either people or technology to help you implement your plan. Time is MONEY!

3

Learn to TRACK EVERYTHING! Costs, time spent, income, etc.

6 Things Jenny Will Do

MOVING FORWARD

1

Develop new strategic partnerships with local businesses and expand on her personalized pop by's by identifying new suppliers.

2

Continue to implement her corresponding social media plan.

3

Continue to deploy bi-monthly emails to her database.

4

Continue to strategize often and early, developing business plans and projections for at least a year in advance.

5

Deploy a ZMA texts campaign to her past clients.

6

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

Jenny's TOOLKIT



NEW DIGITAL COMPANION
find the below toolkit items in

Revii™



2024 Pop-By Calendar

An overview of Jenny's Pop-by and gifting calendar for 2024.

Pop-By System Checklist

Jenny's checklist for deploying a Pop-by campaign and her strategy for client selection.

2024 Spring Baskets Pop-By Example

Examples of the social media posts that are generated by Jenny's strategy.



BONUS **CASE STUDY**

**COACHING MEMBERS HAVE ACCESS TO 100+ CASE STUDIES IN
THE ULTIMATE REAL ESTATE PLAYBOOK COLLECTION.**

Each case study highlights unique strategies and tactics employed by top performers, providing you with actionable insights and inspiration.

Cari Ann Carter



Treating Open Houses Like Art Exhibits:
Create Beauty, Tell Stories, and Capture Leads

THE ULTIMATE REAL ESTATE PLAYBOOK: LISTING ATTRACTION MULTIPLIER

Treating Open Houses Like Art Exhibits

Create Beauty, Tell Stories, and Capture Leads

**Cari Ann
Carter**

 Edina Realty
 @carianncartergroup



THE ULTIMATE REAL ESTATE PLAYBOOK: LISTING ATTRACTION MULTIPLIER

Treating Open Houses Like Art Exhibits

Create Beauty, Tell Stories, and Capture Leads

**Cari Ann
Carter**



Edina Realty



@carianncartergroup



At a GLANCE

Cari Ann Carter's love for design is evident in every aspect of her Open House, from the promotional materials and the staging, to the way she speaks about the property, and even the landing page where she captures contact info. Everything she does turns an Open House from an "empty house" to a beautiful experience – and a busy one!



**Minneapolis,
Minnesota**

PRIMARY MARKET



\$550k

AVERAGE PRICE POINT



23

YEARS IN REAL ESTATE

PREVIOUS PRODUCTION STATS

88

TRANSACTIONS

\$54,900,000

SALES VOLUME

\$1,840,000

GCI

CORE CLIENTELE

- ✓ **Luxury**
- ✓ **Rightsizing**

PRODUCTION

45% | 55%
Buyers | Sellers

TEAM STRUCTURE

- ✓ **10 agents**
- ✓ **3 staff members**

Cari Ann **ON COACHING**



Tom Ferry real estate coaching has transformed my career and continues to drive my success. Through Open House events, I've built lasting client relationships and a reliable source of recurring revenue. But when I hit a ceiling, I turned to my coach and the Tom Ferry ecosystem for clarity and focus. Their coaching has had a profound impact on my production and my team's. With Tom Ferry real estate coaching, I have the strategies and resources needed to continually grow my business and thrive in this competitive industry.

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BY THE NUMBERS

60%

Of total business comes from Open Houses

3-5

Opens per property

15-20

Average attendance per Open

\$800

Budget for an Open House on average

7-12

Strong leads generated by each Open House

1-2

Additional closed transactions originate from each Open on average





THE STORY

For the first five years of her career, Cari Ann Carter lived and breathed Open Houses, at times holding as many as four per weekend. And while she has other lead pillars now, Open Houses still generate a whopping 60% of her business.

Besides her willingness to consistently stay on course with a marketing plan and flawless execution, Cari Ann's deep love for design and architecture means she can tell engaging stories about the homes she shows. She understands that selling real estate is about emphasizing the visual, so she treats each home as a work of art – and she is the docent. Also, because of her eye for design, she has a knack for putting a home in the best light.

Cari Ann's Open Houses showcase both the home and her own capacity to create beauty, story, and experience. No wonder she has distinguished herself among her peers and established herself as a marketing leader when it comes to Open Houses.



THE STRATEGY

VISUAL EXPERIENCE

- With a new listing, Cari Ann becomes a designer for the physical space, the marketing materials, and the staging.
- She helps her clients understand the ROI of staging.
- She seeks to evoke a feeling of luxury that translates easily into online marketing.

PROMOTION AND MARKETING

- Cari Ann's promotion includes circle prospecting up to 500 residents in the surrounding neighborhood by:
 - Sending marketing materials through Mailchimp
 - Sending postcard mailers
 - Delivering door hangers
 - Door knocking
 - Creating Google Ad campaigns
 - Posting on social media
- Her approach typically results in no less than 25 attendees per Open House

COMMUNICATION

- When interacting with visitors, Cari Ann
 - Avoids small talk
 - Actively listens to their interests
 - Attends to them each as she would a special guest
 - Takes notes
 - Employs kvCORE and SISU as her CRM system to record notes about interactions and conversations
 - Follows up after the Open House
- And she trains her agents to do the same!



THE STRATEGY

INFORMING ATTENDEES

- Cari Ann uses QR codes that direct attendees to a landing page where they'll find:
 - Features of the home
 - Disclosures
 - Giveaways like gift cards
- Because attendees are motivated to scan a QR code and enter their contact information on the landing page, she can easily capture lead details.

Cari Ann's 3 Action Items **FOR SUCCESS**

1

Approach other agents and offer to run their Open Houses for them!

2

Invest some time and commit to learning how to have more meaningful conversations with people. Have you read *Exactly What to Say* by Phil M. Jones?

3

Connect with as many people as you can. Send mailers, newsletters, postcards, and social posts. Let as many people as possible know you are hosting an Open House.

6 Things Cari Ann Will Do

MOVING FORWARD

1

Continue to tap technology to capture contact info.

2

Role play with her team to create consistent on-brand introductions (elevator pitches).

3

Increase door knocking to attain a 100-neighbor goal.

4

Further leverage the team in promotional efforts.

5

Continue training the team to have productive conversations at Open Houses.

6

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

Cari Ann's TOOLKIT



NEW DIGITAL COMPANION
find the below toolkit items in

Revii™



Open House Protocol

Overview of Cari Ann's process to launch an Open House.

Samples of Social Media Marketing Posts

Examples of Cari Ann's Instagram posts and Reels promoting the Open House.

Sample of Email Marketing

Example of Cari Ann's Open House email invitations.

Listing Flipbook

Example of the flipbooks Cari Ann produces for her listings.

Coming Soon Postcard

Example of the invitation postcards Cari Ann makes for her new listings.

EXPLORE MORE

IN TF LEARNING

SCAN THE QR CODES BELOW
TO LEARN MORE ABOUT EACH PROGRAM



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LEAD MANAGEMENT BEST PRACTICES



RECRUITING ROADMAP

Build Your Dream Team Faster Without Stepping Away From Your Business

RECRUITING PLAN | HIRING & ONBOARDING PLAYBOOK
RETENTION MODEL



FAST TRACK

Compete With The Pros & Convert Like A Rockstar
The Ultimate New Agent Training

LEAD GENERATION STRATEGIES | PROSPECTING SCRIPTS
ESSENTIAL SYSTEMS



A man with glasses and a dark jacket is speaking to a group of people in a dimly lit room. The audience is seen from behind, and the speaker is gesturing with his hands. A bright light source is visible in the background.

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**LISTING
EDGE**

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EDGE**

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Feb 06**

The Westin Bayshore Vancouver

**LISTING
EDGE**

**Portland, OR
Feb 11**

Portland Marriott Downtown Waterfront

**LISTING
EDGE**

**Tampa, FL
Feb 18**

Embassy Suites Tampa USF

**LISTING
EDGE**

**Atlanta, GA
Feb 20**

Cobb Performing Arts Energy Center

**LISTING
EDGE**

**San Diego, CA
Mar 04**

San Diego Marriott Del Mar

**LISTING
EDGE**

**Orange County, CA
Mar 05**

Hilton Orange County/Costa Mesa

**LISTING
EDGE**

**Los Angeles, CA
Mar 06**

Los Angeles Airport Marriott

**LISTING
EDGE**

**Toronto, Canada
Mar 10**

Hilton Toronto/Markham

**LISTING
EDGE**

**Columbus, OH
Mar 11**

Hilton Columbus Polaris

**LISTING
EDGE**

**Oklahoma City, OK
Mar 12**

Omni OKC

**LISTING
EDGE**

**Houston, TX
May 06**

Hilton Houston North

**LISTING
EDGE**

**Grand Rapids, MI
May 07**

JW Marriott Grand Rapids

**LISTING
EDGE**

**St. Louis, Mo
May 08**

Renaissance St. Louis Airport

**LISTING
EDGE**

**Albuquerque, NM
May 13**

The Clyde

**LISTING
EDGE**

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May 14**

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TomAI+ <small>NEW</small> +	✓	✓	✓	✓	✓
Tom Ferry Referral Network & Communities +	✓	✓	✓	✓	✓
Interactive Business Plan +	✓	✓	✓	✓	✓
Activity Tracking and Reporting +	✓	✓	✓	✓	✓
Advantage Marketplace +	✓	✓	✓	✓	✓
Annual Success Summit +	✓ Discounted	✓ 1 Ticket	✓ 10 Tickets	✓ 15 Tickets	✓ 20 Tickets
Tom Ferry Public Events +	✓ Discounted	✓ 1 Ticket	✓ 15 Tickets	✓ 30 Tickets	✓ 45 Tickets
Exclusive Elite Retreat +	✗	✓ 1 Ticket	✓ 2 Tickets	✓ 3 Tickets	✓ 4 Tickets
Marketing Masterminds +	✗	✗	✓ 4/year	✓ 4/year	✓ 4/year
Team Business Plan +	✗	✗	✓	✓	✓
Team Tracking and Reporting +	✗	✗	✓	✓	✓
Dedicated Customer Support Team +	✗	✗	✓	✓	✓
Team Retreat +	✗	✗	✓ 2 Tickets	✓ 4 Tickets	✓ 5 Tickets
Sales Masterminds +	✗	✗	✗	✓ 4/year	✓ 4/year
Operations Masterminds +	✗	✗	✗	✓ 4/year	✓ 4/year
In-Person Masterminds with Tom Ferry +	✗	✗	✗	✓ Up to 2 sessions	✓ Up to 4 sessions
Specialty Coaching +	✗	✗	✗	✓ 4 credits/year	✓ 8 credits/year
Annual Business Audit +	✗	✗	✗	✓	✓
Live Learning +	✗	✗	✗	✓ 15 seats/year	✓ 45 seats/year
Leadership Webinars +	✗	✗	✓ 4/year	✗	✗
Growth Retreat +	✗	✗	✓ 2 Tickets	✗	✗



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