
Reclaim your schedule

The process to build the schedule you need
and get the results you want

Janet Miller

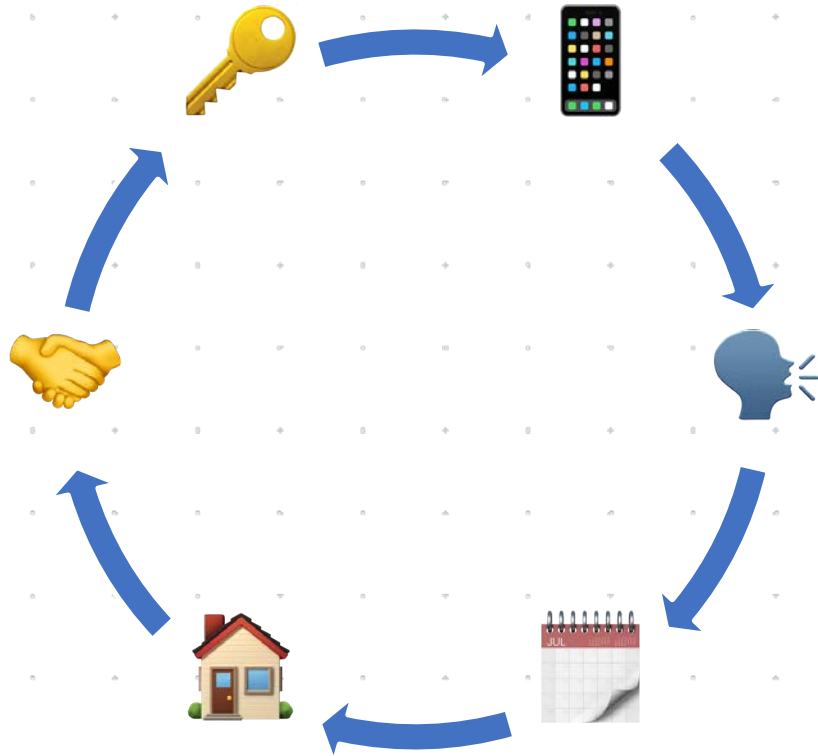


The 5 levels of growth



Step #1:
Visualize your future 🌟

What's the best version of this for your business?



- 1 Create attention via prospecting and marketing
- 2 Start a conversation
- 3 Meet for a consultation
- 4 Sign an agreement
- 5 Negotiate a firm contract
- 6 Successfully close, stay connected, repeat and refer

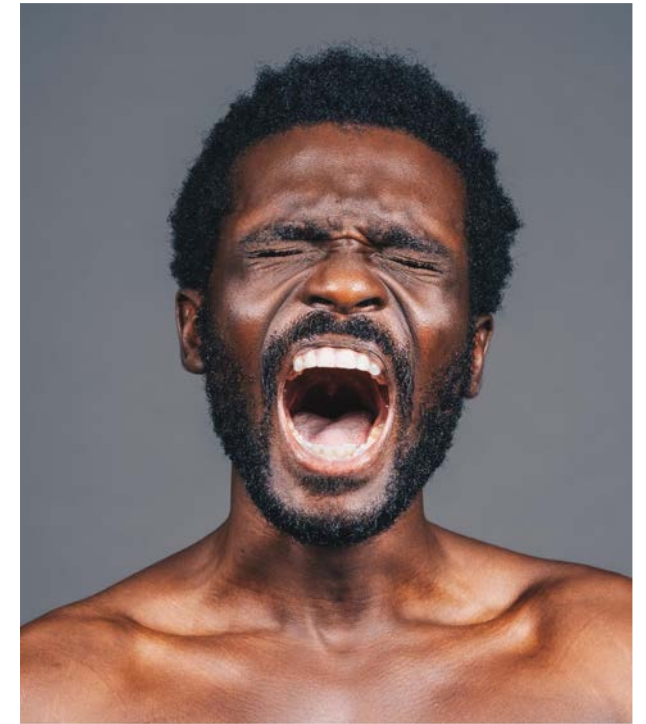


Imagine your 5-star life

- ★ Health and Vitality
- ★ Wealth and Contribution
- ★ Travel and Adventure
- ★ Relationships and Connections
- ★ Personal and Professional Growth

Step #2:
Align your actions 🕒 (build your
time blocked schedule)

Without a time-blocked schedule



This agent uses time blocks

- ✓ His business is thriving.
- ✓ He has time for family and friends.
- ✓ He does daily reading and learning.
- ✓ He is healthy and happy.
- ✓ He is in growth mode in all areas of his life.

Janet Miller
COACH

 **TomFerry™**
SUCCESS SUMMIT





Discipline is a trained behavior and
can be one of your greatest assets.

Book time to do a full audit of your schedule the last week of each quarter

- Your schedule expires every 90 days
 - Sunrise and sunset
 - Family commitments
 - Personal commitments
 - Business needs

Janet Miller
COACH



Block off when you are NOT working

- On Vacation / Travel / Events
- Taking care of your health
- Spending time with the most important people in your life
- Starting and stopping work for the day
- Don't leave white space in your calendar, block off your free time

Janet Miller
COACH



TomFerry™

SUCCESS SUMMIT

Book 30 minutes every Sunday to plan your week

- Measure your results against your goals for the quarter
- Review your calendar
- Double check personal and family commitments
- Set 3 goals for the next 7 days
- **READ YOUR 1 YEAR VISION EVERY SUNDAY NIGHT**

Janet Miller
COACH



 TomFerry™
SUCCESS SUMMIT

Plan your morning routine

- Wake up at the same time
- Make your bed
- Exercise your mind
 - Gratitude
 - Affirmations
 - Journaling
- Exercise your body
- Read your Quarterly Plan
- Read your 7-day plan
- Set 3 outcomes for today

Janet Miller
COACH



Plan your evening routine

- Stop work at the same time
- Debrief on your day
- Family time
- Prepare for tomorrow
 - Read your schedule
 - Lay out clothes
- Reading and Meditation
- Lights out at the same time

Janet Miller
COACH



Use your morning to create opportunities

- Get to the office at the same time
- Study the MLS
- Role play and scripts
- Hour of Power to set appointments
- Team huddles and admin work late morning
- Review contracts late morning
- DO NOT BREAK ANY APPOINTMENTS WITH YOURSELF

Janet Miller
COACH



Use your afternoons to meet with others

- Get in front of people
 - Home Equity Reviews
 - Consultations on selling, buying, investing
 - Visiting properties
 - Connecting with past clients
 - Building new connections

Janet Miller
COACH



 TomFerry™
SUCCESS SUMMIT

Book time to work ON the business

- CEO time
- Projects
- Improving the pillars of your business
 - Finance
 - Sales
 - Marketing
 - Operations
 - People
- Planning and Goal Setting
 - Days
 - Weeks
 - Quarters

Janet Miller
COACH



Pick a color for each type of time block

Your health and happiness

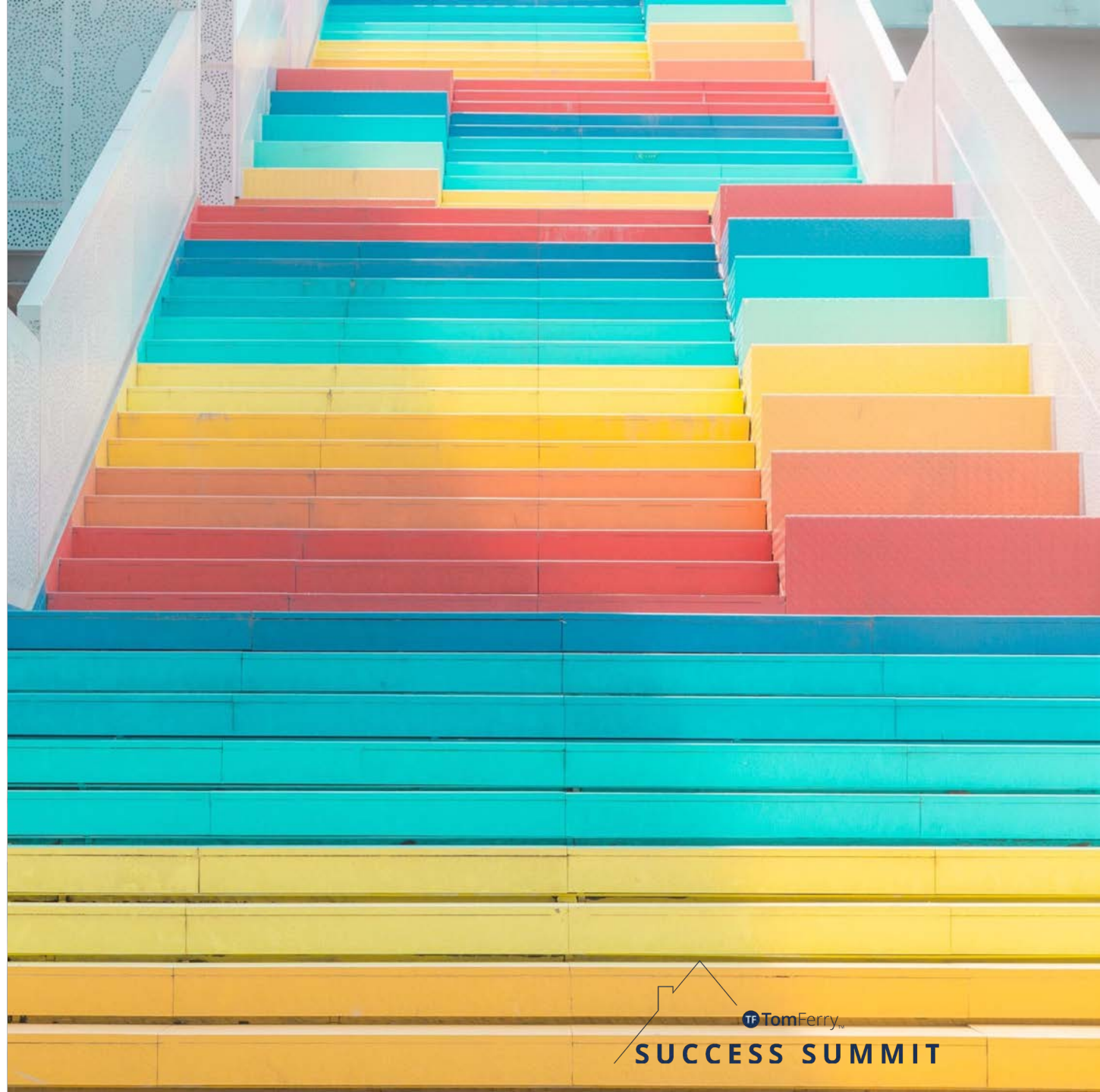
Time with the most important people in your life

Working IN the business

Working ON the business

Sleeping and flex time, doing nothing!

Janet Miller
COACH



Step #3:
Document your journey 🖋️

**At the end of every
day, answer this**

👍 Wins?

👎 Losses?

👊 How can I improve?

Watch your language

✘ Hope
Hope is not a strategy

✘ Should
Should is not a commitment

✘ Try
Try is not a goal

Janet Miller
COACH



Watch your language

What you say to yourself about yourself impacts what you believe, what you do, and what you achieve



Janet Miller
COACH

 Tom Ferry
SUCCESS SUMMIT

WARNING:

Watch out for squirrels
and shiny objects 🐿️

Janet Miller
COACH



 Tom Ferry™
SUCCESS SUMMIT

**Motivation gets you going.
Discipline keeps you growing.**

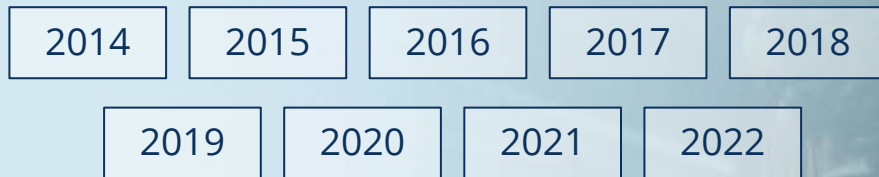
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COACH



#1 COACH

In Real Estate Training

9 Consecutive Years





Instagram.com/**JeffMays_RE**



Facebook.com/**Jeff.Mays1**



LinkedIn.com/in/**JeffMaysVA**



JOY

Confidence

Fun

Can we control...

Interest rates?

Inflation?

The Stock Market?

Gas Prices?

We Can NOT...but we can control:

Our Actions

Our Attitude

Our Approach

That's Easy!
That's My Job!
I Do This All The Time!



www.cnbc.com



The hottest housing market in the US is up 13% and now may be headed for a crash

Jul 10, 2018 — Prices increased nearly 4 percent in the first quarter, according to the Federal Housing Finance Agency, the largest jump in the nation. They ...



**WAITING FOR MARKET
TO CRASH/VALUES ADJUST**

*“It sounds like you are looking for **a deal?**
Or better prices around properties... right?”*

What does a deal mean to you?”

*“As I see it..**you have 3 options.***

- 1. Buy something a little less expensive*
- 2. Look at a few different types of loan products*
- 3. Or put more money down to have the same payment...*

When would be a good time to explore those options...do have 5-10 minutes for a zoom call with my lender?”

SET APPOINTMENT

We're going to still hold off.

"Ok..if I found you a property... that checks all the boxes you are looking for...do you still want to know about it?"

YES

Ok...so nothing's really change...right?
(Continued to Follow Up)

I've Got An IDEA! 
(Pattern Interrupt)

SET AN APPOINTMENT

*“I got an idea!
You have a lot
of great questions. Let’s talk.
What does your
week look like?”*

SET AN APPOINTMENT

*"I got an idea...let's connect.
Are you familiar with zoom?
Let's hop on zoom call
and talk about a strategy."*

*Why Aren't We
Getting
More Referrals?*

Ask and you shall...

90%
Will Refer You!

70%
***Are In a Position
to Refer You!***

Referral Moments


Contract is Accepted

Inspections Are Negotiated

At Closing / Keys Are Turned Over

2 Questions

2x Income



*"I'm sure you've been sharing your with friends and coworkers....about what you purchase.
What have they been saying?
Are they excited for you?"*

*Don't forget about me if you hear
of renters looking to move.*

Do you know of anyone that's mentioned moving?



*"It was a pleasure working within you.
Have a done a good job so far?"*

***Who else do you know that
may want to take advantage
of this market?"***

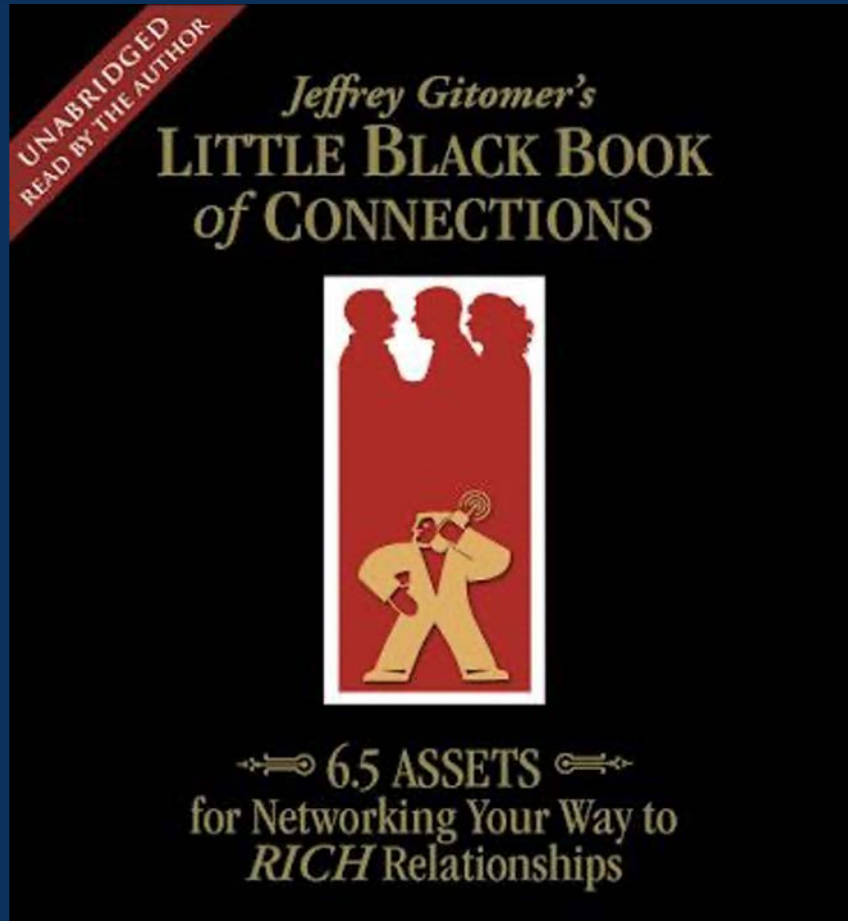
UNABRIDGED
READ BY THE AUTHOR

Jeffrey Gitomer's
LITTLE BLACK BOOK
of CONNECTIONS



— 6.5 ASSETS —
for Networking Your Way to
RICH Relationships

*“All things being equal,
people want
to do **business**
with their **friends.**”*



*“So...to climb
the ladder of success...
you don't need
more techniques &
strategies ...
you need
MORE FRIENDS!”*

CMA-A-DAY



Lead Generation Playbook

REFERRAL

CMA-A-DAY

ALEXANDRA ROJAS

Years in Real Estate: 7

2021 Results

- ❖ Transactions: 33
- ❖ Volume: \$17,341,043
- ❖ GCI: \$537,037


Jan to July (C&P)

- ❖ Transactions: 17
- ❖ Volume: \$13,300,000
- ❖ GCI: \$505,000

BY THE NUMBERS



Database size:	400
2021 percentage of business attributable to PC/SOI :	60%
2021 database GCI:	\$322,222
CMA's a month:	20 (that's over half her database per year!)
CMA's that result in responses by phone, text or email:	90%
CMA's that result in face-to-face conversations:	30%
Rate of referrals from face-to-face conversations:	14%



WHY CMA-A-DAY

It's a lot harder to build a client base than it is to keep it. And it's a lot easier to impress clients so they recommend others than it is to pay for referrals. Your database is a gold mine, and either you're mining it or another agent is.

“The Playbook”

ALEXANDRA'S APPROACH



BACKGROUND



Only recently has Alexandra fully integrated CMA-a-Day into her client service. Now it's a cornerstone for engagement. What she knows:

- ❖ A CMA is the perfect way to start a conversation which transitions into a personal meetup – Alexandra's strong suit.
- ❖ A personal meetup is the best way to build trust and share value – which leads to word of mouth and referrals.



Every listing,
every sale and
every appointment
starts with a conversation.

*You are just
not having
enough conversations.*

CONTENT



- ❖ Don't use PDFs or any other attachments. People need to be able to see it fast and read it fast.
- ❖ Don't tell the whole story. The goal is to pique interest so you have something to talk about face-to-face.
- ❖ Customize email subject lines.
- ❖ Producing two CMA emails takes 30 minutes a day

CONTENT



- ❖ Send the email.
- ❖ Send a text the next day (video text or regular).
- ❖ Follow up with a phone call after 3 days if they haven't gotten back to you.
- ❖ Ask to meet in person.

***“Do me a favor...
I’ll be sending you an **EQUITY ANALYSIS...**
take a few moments to look at it and let’s
discuss next week.***

When would be a good time to connect?”

“The Playbook”

ALEXANDRA'S TOOLKIT



ALEXANDRA's TOOLKIT



Example CMA email

John and Susan,

I hope all is well with you. I know you are familiar with everything going on in Miami and how the housing market has been insane. I do have good news :) You did the right thing by investing in real estate so I am sending you the current market value of your home in today's market. I want to say THANK YOU for allowing me to serve and help you with all your real estate needs. Please see below

12582 SW 99th Ave Palmetto Bay FL 33157 **ESTIMATED VALUE \$600,000.00**

ALEXANDRA'S TOOLKIT



Asking for Referrals:

Susan, since your home increased so much in value, do you think any of your neighbors might be interested in selling?

[If Yes]: Great, do you think you can connect us?

[If No]: Since I am actively prospecting your neighborhood, do you know anyone looking to buy there or nearby? Great, can you connect us?

3 THINGS YOU CAN DO NOW



1

**Keep it simple.
The details are for
face-to-face.**

2

**Follow up.
The whole purpose
of sending a CMA is
to start a
conversation.**

3

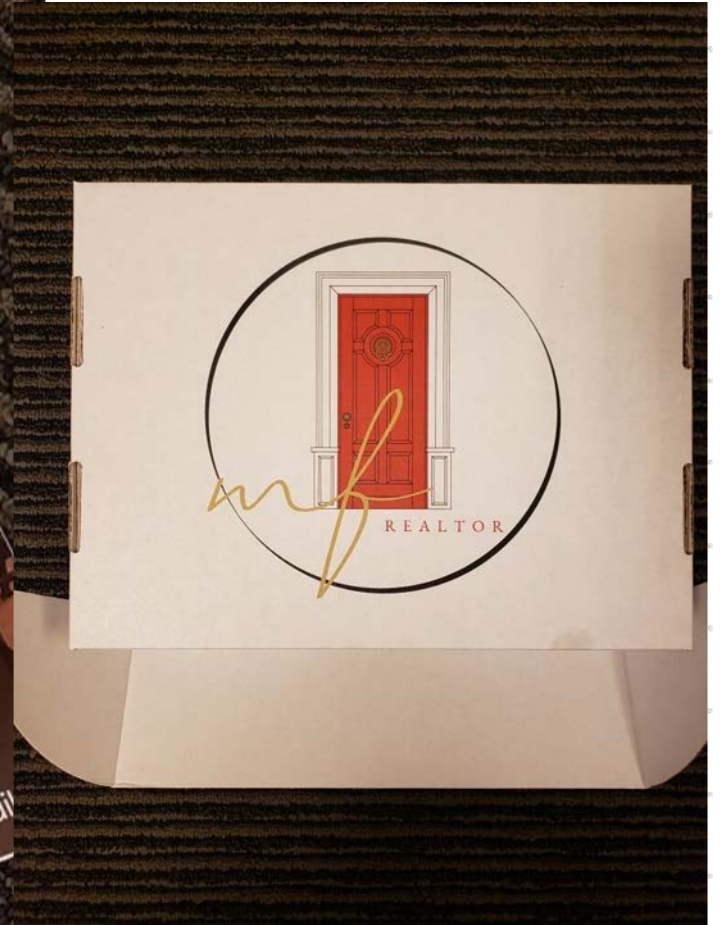
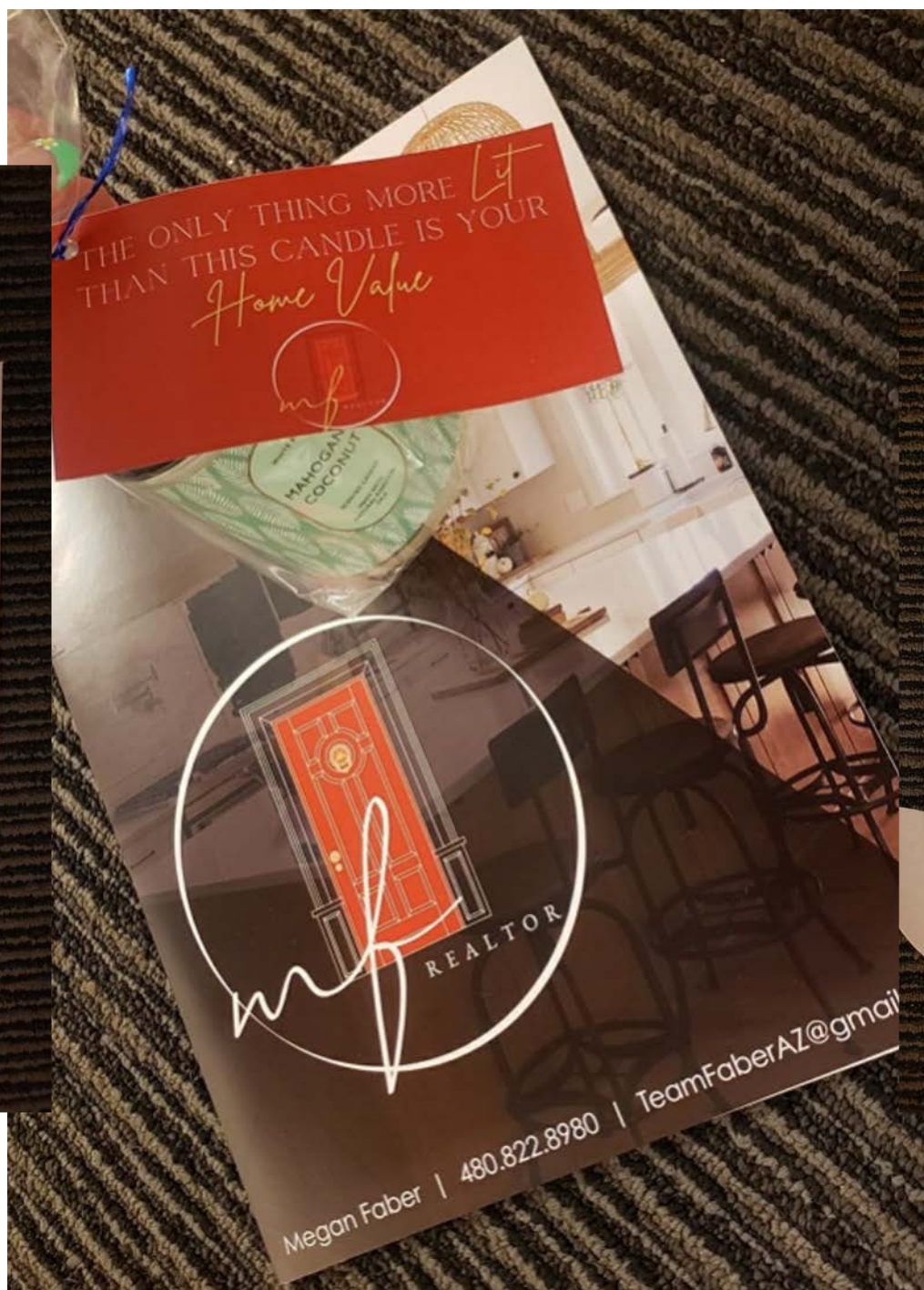
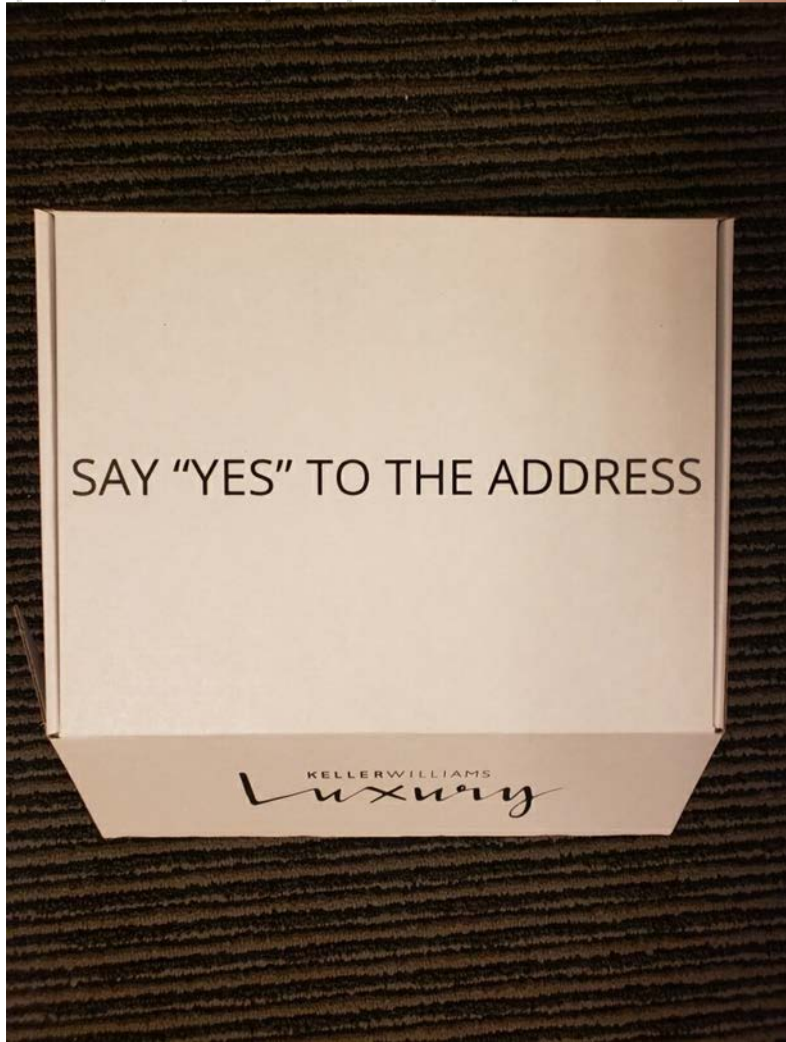
**Remember that it's
only one tool in what
should be a
comprehensive
database marketing
plan.**



Since joining coaching, my business has doubled year after year. The value of weekly accountability with my coach has helped me stay consistent and create strong, sustainable daily routines that resulted in massive growth. In addition to my coach, I find incredible value in the relationships I have created with other agents through the Tom Ferry community. Besides being able to R&D from many amazing agents in this ecosystem, I will forever be grateful for the opportunity of creating a strong client-base referral network.

ALEXANDRA ON COACHING





Janet Miller
COACH

Your Arizona Home Value



Created by
Gregory

Keeping you up to date on the value of your Arizona real estate @ 200 W. Portland St. Unit 1013

5 items below



PROPERTY REPORT

200 W Portland St, Unit 1013, Phoenix, AZ 85003



Current Value (Buyers Pay 5-15% over asking price)

Here is the estimated current value of your home in Arizona. But keep in mind our seller clients are seeing buyers pay 5-15% over asking price!

[View PDF](#)

Number of pages 30

Statistical Market Analysis

Status	#	List Listings	Sold Volume	List Price	Sold Price	Sell/List Price	Approx SQFT	List Price Per Approx SQFT	Sold Price Per Approx SQFT	Agent Days on Market	Cumulative Days on Market
Active	1	499,500	0	Low 499,500	0	0.00	2,966	166.41	0.00	39	39
				Avg 499,500	0	0.00	2,966	166.41	0.00	39	39
				High 499,500	0	0.00	2,966	166.41	0.00	39	39
Closed	4	1,893,900	1,876,500	Low 425,000	430,000	0.96	2,897	143.39	145.07	3	3
				Avg 473,475	489,125	0.99	2,956	160.08	196.68	19	19
				High 548,000	525,000	1.01	3,000	183.00	175.00	47	47
Expired	1	505,000	0	Low 505,000	0	0.00	2,897	174.32	0.00	4	4
				Avg 505,000	0	0.00	2,897	174.32	0.00	4	4
				High 505,000	0	0.00	2,897	174.32	0.00	4	4
Cancelled	1	474,900	0	Low 474,900	0	0.00	3,028	156.94	0.00	26	26
				Avg 474,900	0	0.00	3,028	156.94	0.00	26	26
				High 474,900	0	0.00	3,028	156.94	0.00	26	26
Overall	7	3,373,300	1,876,500	Low 425,000	430,000	0.96	2,897	143.39	142.86	31	31
				Avg 481,900	489,125	0.99	2,956	162.86	182.86	21	21
				High 548,000	525,000	1.01	3,028	183.00	183.00	47	47

Custom Statistical Market Analysis

If you like spreadsheets, this is for you!

[View PDF](#)

Number of pages 1

MARKETING YOUR HOME



How We Do It!

Find out how we market homes for top dollar and set records in any neighborhood!

[View PDF](#)

Number of pages 12

CHANGING THE GAME IN LUXURY REAL ESTATE

Pro Athlete's Real Estate & Lifestyle

Our Exclusive Marketing Deck for Luxury Homes!

[View PDF](#)

Number of pages 8



GregHidder.com Website

The Story Behind the Agent!

[View link](#)

<http://www.GregHidder.com>

KEEPING OUR CLIENTS UPDATED ON THE VALUE OF THEIR MOST PRIZED POSSESSION!



TF Elite Private Group

Gregory Alan Hidder · 1d ·



**CMA/day led to a \$1,000,000 listing which will sell in a weekend!
Thank you Jeff Mays for holding me accountable 🙌🔥💪**



Love



Comment



TF Elite Private Group

Private group
3,762 Members

See Group



Lead Generation Playbook

REFERRAL

CMA-A-DAY

ALEXANDRA ROJAS

Years in Real Estate: 7

2021 Results

- ❖ Transactions: **33**
- ❖ Volume: **\$17,341,043**
- ❖ GCI: **\$537,037**

Jan to July (C&P)

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- ❖ GCI: **\$505,000**



Lead Generation Playbook
REFERRAL

DATABASE
MATT FARNHAM

Years in Real Estate: 18

2021 Results

- ❖ Transactions: **122**
- ❖ Volume: **\$60M**
- ❖ GCI: **\$1,575,000**


Jan to July (C&P)

- ❖ Transactions: **72**
- ❖ Volume: **\$40M**
- ❖ GCI: **\$1,050,000**

BY THE NUMBERS



Database size:	500
Percentage of business from database + referrals:	62%
2021 database transactions:	54
Referrals closed in 2021:	21
2021 total database GCI:	\$1,004,000
Yearly touch points with each client:	40
2021 gifts, events, salaries for database and referrals experience:	\$86,000
Return on Investment for database and referrals:	12x



“The Playbook”

MATT'S APPROACH



PHILOSOPHY



Matt's goal is not to solicit business, but to attract it. He understands that a successful real estate career is a marathon, not a sprint. And, with the industry becoming a pay to play game, more agents for less transactions means either joining the race to the bottom or setting the bar for white glove service.

EXPERTISE



- Know your hot sheets. Understand what's happening on a national level, but even more importantly at a hyperlocal level.
- When you talk to others, be precise. Don't say the market went up 4% when it went up 3.8%. Precision impresses.
- Know what's relevant. Always have those "cocktail party" nuggets ready to drop.
- Keep your communication simple and clear. Uncertainty brings anxiety. Be the certainty your clients need. Expert advice does not always mean perfect advice.

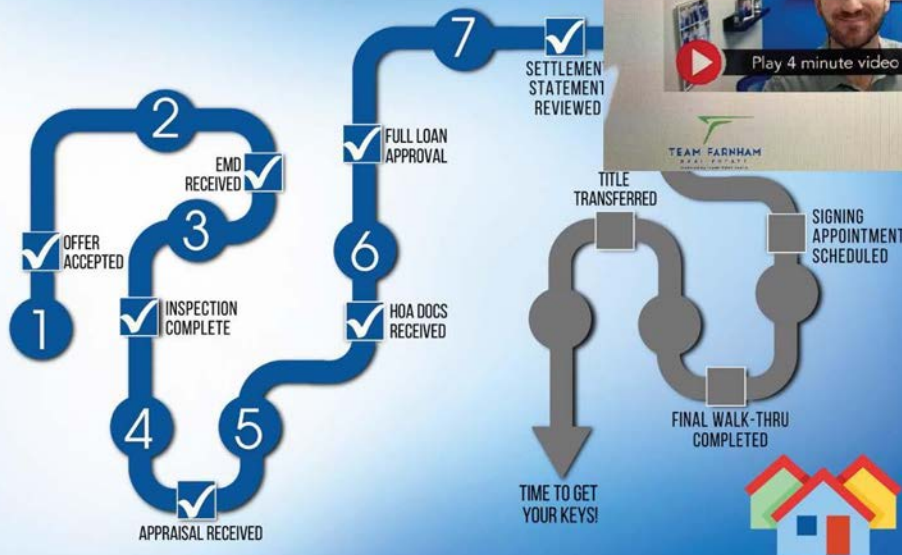
“The Playbook”

MATT'S TOOLKIT



MATT'S TOOLKIT

Communication is more important to your client's experience than any fancy gift you could give them



TRANSACTION MOMENTS
Home Inspection Bag - Moving Boxes
Champagne & Cutting Board at Signing - Custom Closing Gift

MATT'S TOOLKIT



HEY THERE! WE'RE THE HUB: LAS VEGAS!



CITY ENGAGEMENT

We have partnered with an organization that we are passionate about where we can donate & serve. As well as invite our SOI to participate.

JUNE HOMEBOT 1819 SANTIAGO DR

Your new home value estimate is ready.

[See your value](#)

Team Farnham • Real Estate Broker
 (702) 530-7289 • team@teammarnham.com
 State License: B. 1000941
 Crown Point
 950 Avenue

Hi Team Farnham,
 Thank you for the anniversary home gift :) Hope you all are doing well.
 Ps I love the homebot monthly email, its nice to see our property value go up.
 Have a great summer!
 Warm regards,
 Jamie & Jesse

Kristen Martinez wants to know more about their market temperature:

"Should I sell now?"

[View client in Homebot](#)

Get in touch with Kristen Martinez to answer their question:
kristenmartinez@gmail.com
 Or simply reply to this email

📈 89014 is in high demand and picking up quickly ↑

based on home prices, inventory and days on the market

[See 89014 report](#)

MARKET UPDATES & HOMEBOT
 As well as sending out monthly market updates our Sphere has been set up on Homebot. This is a great engagement tool to provide value to our clients with email updates twice per month!

Client Satisfaction Survey

Thank you for Choosing Team Farnham Real Estate. We sincerely appreciate your business and we enjoy assisting you throughout this transaction process. As client satisfaction as one of our main goals, we would appreciate your feedback on your experience thus far. Thank you for your time!

Email *

Realtor Name

Sales Team/Transaction

	Very Satisfied	Satisfied	Neutral	Unsatisfied	Very Unsatisfied
How do you feel we have represented you?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Have we listened to your concerns and comments?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Were we able to answer your questions and resolve any problems?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communication and Responsiveness with your agent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Negotiations skills at time of the offer:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If Buying: Our knowledge of the home-buying process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If Selling: Marketing and Promotion of your home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Client Care

	Very Satisfied	Satisfied	Neutral	Unsatisfied	Very Unsatisfied
How was the transition from your agent to our client care team during Escrow	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Did you feel our team kept your best interest in mind and kept you informed throughout the process?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall do you feel our team delivered what we promised you at the beginning? (Loyalty, communication, integrity, etc)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How satisfied are you with the quality of service we provide?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Was there been anything we could do to better serve you?

Is there anything that has not been explained or something we could have explained better throughout the process?

Anything further you would like our Staff/Team to know at this time?

We appreciate your feedback.
 Thank you!

[Submit](#)

MATT'S TOOLKIT



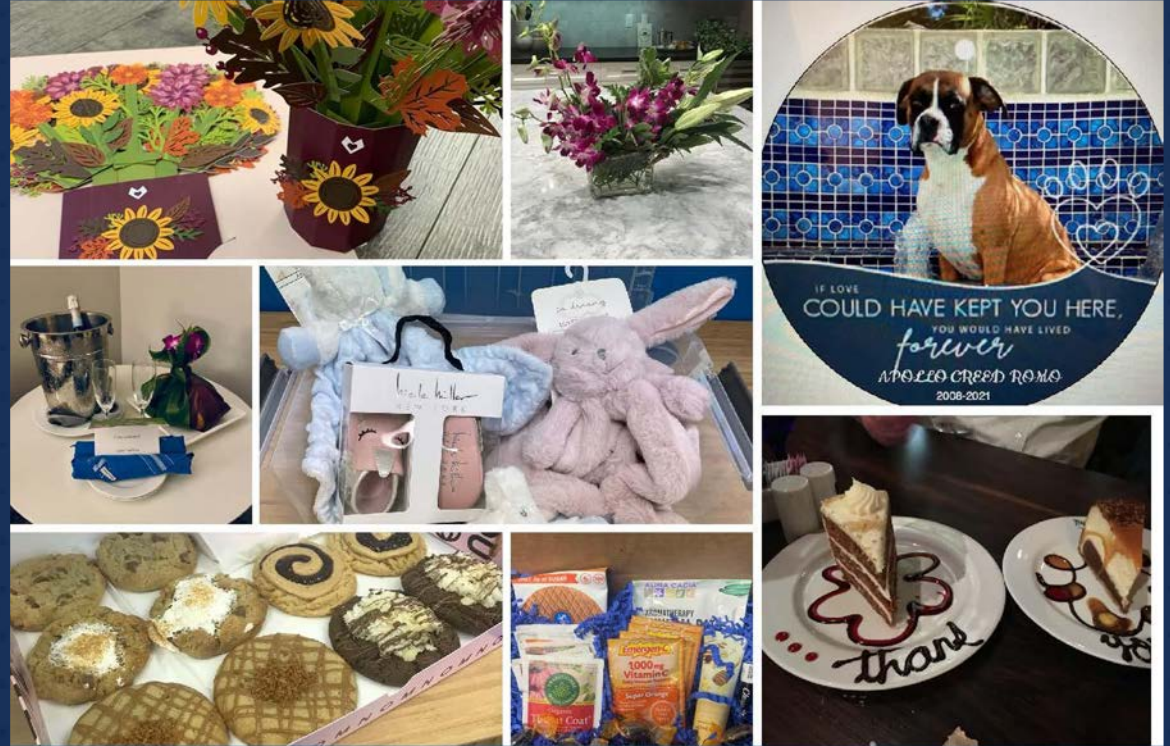
CUSTOM CLOSING EXPERIENCE
 Custom Baskets - Photos Books - Movie Theater Rental - Christmas Tree Set Up - Bungy Jumping - Zip Line - "Taste of Las Vegas" Book Foodie Tour - Red Carpet & Champagne

FRIENDS & FAMILY EVENTS

MATT'S TOOLKIT



POP BY'S



SUPRISE & DELIGHT

Wedding Anniversary, New Baby, Engagements,
Retirement, Pet Passing, Clients on Vacation, etc.
We're always looking for ways to love on our clients!

4 THINGS MATT WILL DO GOING FORWARD



1. Capture and repurpose the activity and moments we celebrate with clients. Show the world what we do for those who work with us.
2. As the market is shifting we are reevaluating all the touch points from initial meeting to closed escrow with a client. Time to bring even more value than before!
3. Start getting video testimonials. We have great reviews but need to capture more on video for our website, Google Business Profile and social media.
4. Work with my Tom Ferry coach to help me implement and hold me accountable!



The relationships I've made from the Tom Ferry ecosystem have been a major influence in my business. I learn so much from each of them, seeing what other agents are doing and the focus it brings me. Agent-to-agent referrals from this ecosystem are now second to my sphere of Influence.

MATT ON COACHING





Lead Generation Playbook
REFERRAL

DATABASE
MATT FARNHAM

Years in Real Estate: 18

2021 Results

- ❖ Transactions: **122**
- ❖ Volume: **\$60M**
- ❖ GCI: **\$**

Jan to July (C&P)

- ❖ Transactions: **72**
- ❖ Volume: **\$40M**
- ❖ GCI: **\$1,050,000**

Agent-to-Agent



AGENT SEARCH

Total access to the Tom Ferry Referral Network.

TF TomFerry AGENT SEARCH

FIND CANDIDATES FOR YOUR REFERRAL

The best agents in the business, just a click away!

Search agents near [Search]

Near [Name]





Paula Clark
Keller Williams
Westwood, NJ



Email

paula@thepaulaclarkgroup.com

Phone

(201) 280-0056

About Me

We have a very tight knit team, and our most important thing in life is culture and Core values. We serve our clients like family. We are here to help you should you refer your buyers and sellers to us. We serve the Northern Bergen County area, which is on this card in this platform.

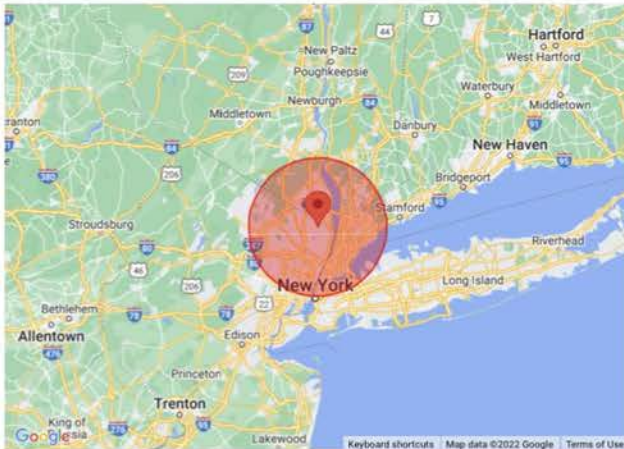


Neighborhoods

- Bergen County
- Westwood
- Old Tappan
- Emerson
- Harrington Park
- Norwood
- Northvale

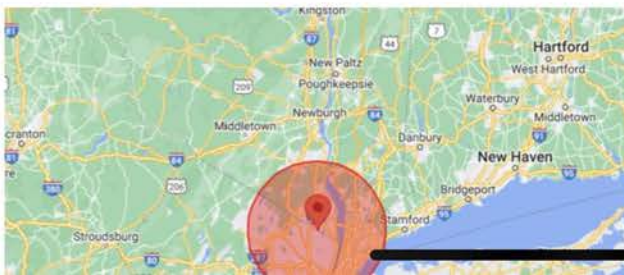
My Specialties

Service Area



Primary: 1046 Washington Ave S, Old Tappan, NJ 07675, USA

Radius: 20 miles



Secondary: 31 Pennsylvania Ave, Montvale, NJ 07645, USA

Radius: 20 miles



Database

110% Community Focused

Lead Generation Playbook
REFERRAL

DATABASE

ALAN & BETSY THOMPSON

Years in Real Estate: 22



2021 Results

- ❖ Transactions: **129**
- ❖ Volume: **\$52,100,000**
- ❖ GCI: **\$1,610,000**


Jan to July (C&P)

- ❖ Transactions: **85**
- ❖ Volume: **\$40,784,073**
- ❖ GCI: **\$1,268,888**

BY THE NUMBERS



Database size:	1,100
Percentage of business from database + referrals:	92%
Referrals closed in 2021:	79
2021 total database GCI:	\$1,481,200
Yearly touch points with each client:	40
2021 gifts, events, salaries for database and referrals experience:	\$98,680
Rate of return on database and referrals:	14X



WHY DATABASE



You really can build your business from the ground up by reconnecting with old friends. And your database really can be your only lead source when friends and clients become your raving fans.

“The Playbook”

ALAN & BETSY'S APPROACH



*What's Your
Promise To Your
Clients?*

*" I'm going to make you **so happy...**
that you're going to be **excited**
to bring me new business!"*

- Betsy Thompson

PHILOSOPHY



Alan and Betsy know who they are and the rules they play by:

- Never pay for a lead.
Everything is to be completely community-oriented and focused on delivering value.
- Teach your clients to give you referrals. Betsy tells every one of her clients that she doesn't spend her time making cold calls and that they are her only source for new business. And she makes a promise: "I'm going to make you so happy that you're going to be excited to bring me new business."



You Got Lucky Client Event





Flag Delivery 3x Year





500 Birthday Gifts



ALAN & BETSY'S TOOLKIT


2021 Year in Review

THE Thompson FAMILY

2021 Year in REVIEW

Many have had a difficult year this year with illness, loss, uncertain employment, and isolation due to continued COVID-19. We know this past year has been full of challenges, and we hope that the coming year brings more certain times for your family. We are sending all our good wishes for better days ahead.

So, as we look at each new year as a book with 365 blank pages. Let's hope we write a new best seller in 2022!

 We traveled to Orlando, Dallas, and Nashville on business, and got a little down time in each one. We travelled with Bri and friends to the mountains outside Asheville and to Puerto Rico!

Betsy and I did get to go on our December trip to Antigua! Our end of year recoup, recover, and rest trip to get ready for 2022!

 We are excited for planned travel in 2022 to Las Vegas, Jamaica, Colorado, California, and 1 more warm tropical place!

Our 4-legged family had a good year. **Lucky** did have a back injury from jumping too much but he quickly recovered. **Maverick** is still crazy and guarding the backyard, and **Karma** is enjoying her private space in the back of Betsy's closet!



 **CELEBRATED!** 

Alan	59	Lucky	8
Betsy	47	Karma	5
Brianna	15	Maverick	2

Lucky Homes 3



Look out world, Brianna got her permit and will be on the roads soon with her Honda Accord she got for Christmas and Birthday.

Brianna made the **Cape Henry Collegiate Tennis team**. She also finished the 1st Semester of her Sophomore year with **straight A's!**



Alan got a new bike to ride and has even registered for a race in 2022. The answer for how many bikes do you need is always $X = N + 1$

Betsy went on a girls trip to Destin, FL with some longtime friends. They made it back alive and I didn't get called for bail money! They also did a girls trip to the Outer Banks and as far as I know the house is still there.



Betsy said she was going to run more in 2022... Alan asked who was going to be chasing her?

Page 1

Lucky Realty

2021 Year in REVIEW

We all started 2021 looking for a year better than 2020. For some of us, 2021 was a record year. We know that many still suffered in 2021 due to COVID-19 issues and something new, staffing issues! Whether you were a business owner, trying to hire staff, or an employee working extra hard because of staffing shortages, we salute and admire you for working hard and pushing thru it! We were fortunate to have a great year in real estate sales, although it was absolutely one of the most stressful years ever. When there are 5+ buyers for every home, competitive offers all the way around, and stressful timelines to try and get buyers a place to live, believe me, we are feeling the stress and worked more hours this year than we ever have trying to make it work for our clients.

Betsy was voted COVA Magazine BEST AGENT in Coastal Virginia! And **Lucky Realty** was voted the Top Real Estate Company in Coastal Virginia!



Alan was elected to the Hampton Roads REALTORS Assoc. Executive Committee. **Betsy** is also on the local **YMCA Board of Directors**.

We won the **Diamond Award For Small Teams** at the REALTOR® Circle of Excellence Awards which is the highest level given!

Lucky Is Local! We work hard to support our local community, Great Bridge, Chesapeake, and Coastal Virginia. We did our first quarterly local gift with **MADD Seasoning** and it was a huge success. We also delivered Birthday Cakes from **Bizzy Bees Baking** and **Tracy's Treats** made 260 pies for our Thanksgiving Pie event. We are proud of our to live in American and to support our local active duty and Military veterans with over 2,000 flags delivered!



We were able to hold 4 major events, our Strawberry Patch, Pumpkin Patch, Thanksgiving Pie Pickup, and our first Get Lucky event at Big Ugly Brewery! We have a great new event in the planning stages for 2022 so look out!



Our Team grew this year! **Keren, Lisa** and **Sierra** joined the team with **Amanda** and **Vikki**. Keren is our marketing manager, developing all our great content. Lisa is a Buyer Sales Associate insuring our buyers get the best service every day, and Sierra is our personal assistant and family manager. The entire team is here to bring luxury concierge service to every transaction and we couldn't do it without them.

Alan told Betsy "Cooking is easy."

Betsy said "It's not easier than not cooking!"

Page 2

ALAN & BETSY'S TOOLKIT

Marketing Plan

Lucky Realty - 2022 Marketing Plan (Page 1 of 2)

Month	Recipients	Theme/Piece	Format	Start Date	Completed	Est Cost	# Contacts	Goal	Results	
January	Database	Update	Email	1/15		\$50	1500	10% Open		
	PC/A+JA/B	Year Review	Mail - Letter	1/1		\$750	500	Connect		
	Eday Cards	Happy Eday	Mail - Card	1/1		\$75	50	10% callback		
	SGVO eo Farm	Year Projections	Postcard	1/1		\$2,000	2000	Branding		
	Lucky Ladies Club		Event	1/1		\$300	20	Local Social		
	Eday Cakes	Happy Eday	Cakes	1/1		\$600	20	WOW!		
	SGVO eo Farm	Investing in RE	Postcard	1/15		\$2,000	2000	Branding		
	VIP Popby/CG	Ice Scrapers	Delivrey	1/15		\$4,000	500	Branding		
						Expense	\$9,775			
	February	Database	Update	Email	2/15		\$50	1500	10% Open	
Eday Cards		Happy Eday	Mail - Card	2/1		\$75	50	10% callback		
SGVO eo Farm		First Home Story	Postcard	2/1		\$2,000	2000	Branding		
Lucky Ladies Club			Event	2/1		\$300	20	Local Social		
Eday Cakes		Happy Eday	Cakes	2/1		\$600	20	WOW!		
SGVO eo Farm		What Prior to Sell?	Postcard	2/15		\$2,000	2000	Branding		
VIP Pop By - Local		Local Item	Delivrey	2/15		\$7,000	300	Local WOW!		
						Expense	\$12,025			
March		Database	Update	Email	3/1		\$50	1500	10% Open	
		Eday Cards	Happy Eday	Mail - Card	3/1		\$75	50	10% callback	
	PC/Referrer	St. Pat's Invite	Card	3/1		\$900	250	100 RSVP		
	Lucky Ladies Club		Event	3/1		\$300	20	Local Social		
	SGVO eo Farm	Curb Appeal	Postcard	3/1		\$2,000	2000	Branding		
	Eday Cakes	Happy Eday	Cakes	3/1		\$600	20	WOW!		
	PC/Referrer	St. Pat's Invite	Event	3/1	17-Mar	\$7,000	300	100 Attend		
	SGVO eo Farm	Sell a Home Every X days	Postcard	3/15		\$2,000	2000	Branding		
						Expense	\$12,525			
	April	Database	Update	Email	4/15		\$50	1500	10% Open	
PC/A+JA GB		Easter - Peeps	Pop-By	4/1		\$2,500	500	Connect		
Eday Cards		Happy Eday	Mail - Card	4/1		\$75	50	10% callback		
Lucky Ladies Club			Event	4/1		\$300	20	Local Social		
SGVO eo Farm		Area Resources	Postcard	4/1		\$2,000	2000	Branding		
Eday Cakes		Happy Eday	Cakes	4/1		\$600	20	WOW!		
SGVO eo Farm		Money Saving	Postcard	4/15		\$2,000	2000	Branding		
						Expense	\$7,925			
May	Database	Update	Email	5/15		\$50	1500	10% Open		
	Eday Cards	Happy Eday	Mail - Card	5/1		\$60	60	10% callback		
	SGVO eo Farm	Area Resources	Postcard	4/1		\$2,000	2000	Branding		
	SDI	Strawbery Invite	Postcard	5/1		\$500	500	200 RSVP		
	Lucky Ladies Club		Event	5/1		\$300	20	Local Social		
	Eday Cakes	Happy Eday	Cakes	5/1		\$600	20	WOW!		
	PC/A+JA GB	Strawbery Patch	Event	5/1	May 9	\$7,500	600	250 Attend		
	SGVO eo Farm	Flag Delivrey	Pop-By	5/20		\$5,000	2000	Branding		
	VIP Popby/CG	Local Item	Delivrey	5/1		\$7,000	500	Branding		
						Expense	\$23,010			
June	Database	Update	Email	6/15		\$50	1500	10% Open		
	Eday Cards	Happy Eday	Mail - Card	6/1		\$75	50	10% callback		
	SGVO eo Farm	Invite - Sno Cone	Postcard	6/1		\$2,000	2000	Branding		
	Lucky Ladies Club		Event	6/1		\$300	20	Local Social		
	Eday Cakes	Happy Eday	Cakes	6/1		\$600	20	WOW!		
	Neighborhood Event	Sno Cone	Event	6/15		\$3,000	3000	200 Attend		
	SGVO eo Farm	Home Improve	Postcard	6/15		\$2,000	2000	Branding		
						Expense	\$8,025			

“The Playbook”

ALAN & BETSY'S TOOLKIT



ALAN & BETSY'S SCRIPTS



Betsy's exact script

"Look, you're going to be with me for the rest of your life. You're going to be at my events, you'll see me drop by your door, and anything you ever need, you're going to reach out to me. But here's the deal, I don't spend two hours a day on the phone prospecting. You are my prospecting. You're not one client to me. I'm going to make you so happy that the next ten clients I have are going to come from you. We only work by referral, so you are a critical part of our team."

3 THINGS YOU CAN DO NOW



1

No matter where you are, pick up the phone and start reconnecting. Reach out on Facebook and start having real conversations.

2

Whenever you get a client, teach them how to refer you. Always show gratitude and remind people how much their support means to you.

3

Go all out on client care. Invest money in events and gifts. And most of all, be personal, authentic, and caring.



The relationships I've made from the Tom Ferry ecosystem have been a major influence in my business. I've learned so much from each of you, seeing what other agents are doing and the focus it brings me. Agent-to-agent referrals from this ecosystem are now second to my sphere of Influence.



ALAN & BETSY ON COACHING



Lead Generation Playbook
REFERRAL

DATABASE

ALAN & BETSY THOMPSON

Years in Real Estate: 22



2021 Results

- ❖ Transactions: **129**
- ❖ Volume: **\$52,100,000**
- ❖ GCI: **\$1,610,000**

Jan to July (C&P)

- ❖ Transactions: **85**
- ❖ Volume: **\$40,784,073**
- ❖ GCI: **\$1,268,888**

“I See All Your RE Posts/Videos”

I appreciate that. We're working hard right now. Real estate is so interesting.

Where do you live again?

How long have you lived there?

*I got an idea...homeowners are truly **surprised** at what they can get for their house in this market. I know you're not even thinking of moving.*


How about I email/text you an equity analysis?

What's your email address again? Sound like a plan?



Tie-Down Phrases

To Create Agreement

- 
- ✓ Sound like a plan?
 - ✓ Wouldn't you agree?
 - ✓ Does that help?
 - ✓ You know what I mean?
 - ✓ Are you following me?
 - ✓ Does that work for you?

Who Would You Rather Be?

JAN

\$700,000 List Price
\$850,000 Sold Price
4.5% = \$4,306 P&I

NOW

\$700,000 List Price
\$650,000 Sold Price
5.25% = \$3,589 P&I

Who Would You Rather Be?

JAN

\$700,000 List Price
\$850,000 Sold Price
4.5% = \$4,306 P&I

NOW

\$700,000 List Price
\$650,000 Sold Price
5.25% = \$3,589 P&I

Saving \$258,120 over 30yrs.

Gaining: More choices, less multiple offers,
better deals, appraisals & inspections.

danoneil_ 55 76.9K 1,158
 Posts Followers Following

Dan Oneil
 NY- FL

- | #1 Real Estate Team Long Island
- | Soon To be #1 Team SWFL 🌞
- | For Listings/Sales Visit... more
youtu.be/Zz82YozTG6E

Followed by joncariello_, amandapalmeri and 167 others

Following Message Contact +2

Travel 2 Podcast Team B2L FLORIDA 🌞

Is Now A Good Time To Buy ??

DIABOLICAL

DANONEIL_ Posts

Right?

Liked by petergiannikopoulos and 11,372 others

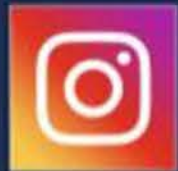
What we're seeing now is...
*buyers are getting what buyers **couldn't** have gotten 2-3 months...even a year or two ago.*

Did you realize there are

- *More choices*
- *Less Multiple Bid Situations*
- *Inspections*
- *Some Closing Costs Paid*
- *Even Better Deals*

When would be a good time to look at these houses and explore those options?

*What Are You
Waiting For?*



Instagram.com/**JeffMays_RE**

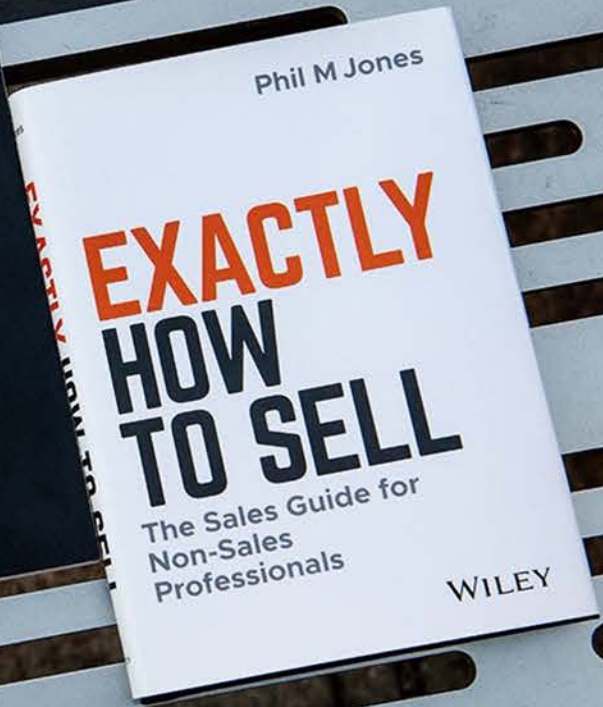
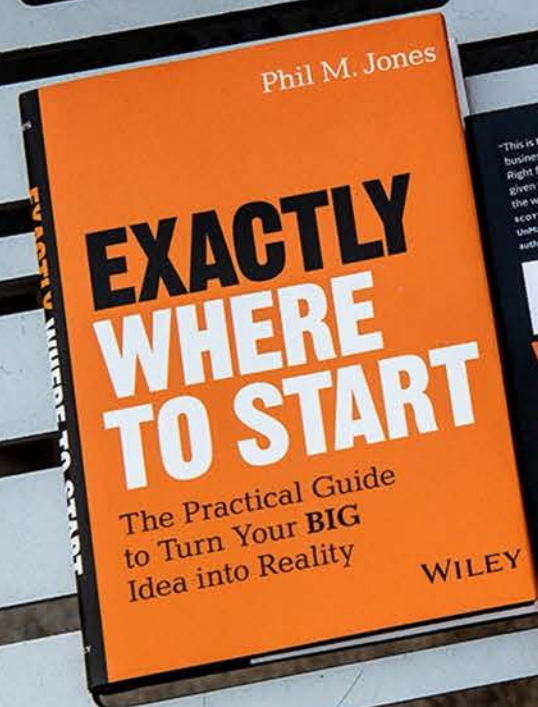


Facebook.com/**Jeff.Mays1**



LinkedIn.com/in/**JeffMaysVA**





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philmjones
make more of your conversations count

infectious self-belief



**Know the
secret to
getting what
you want**



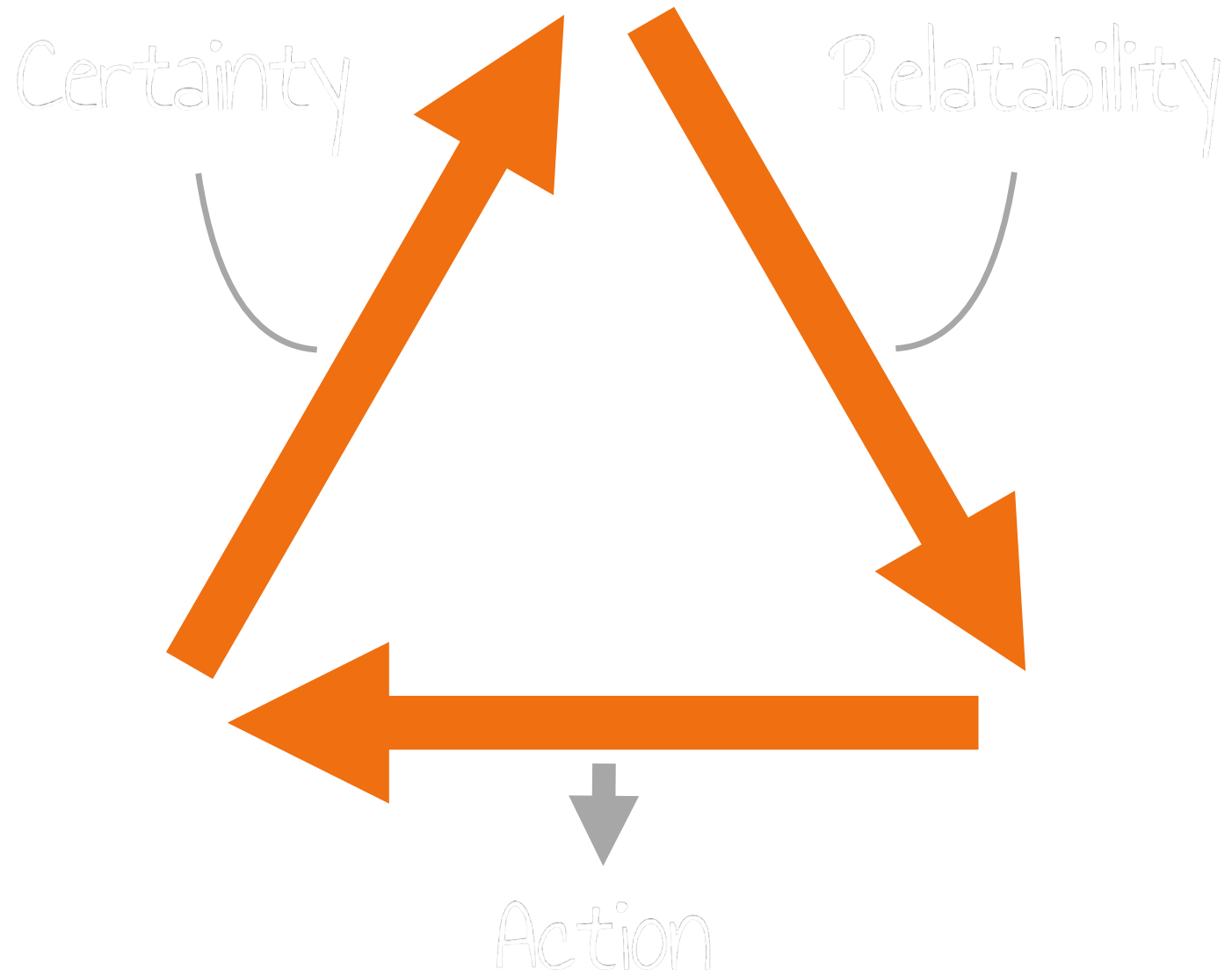
"This is the dictionary of
business success language.
Right from page 1, you're
given the strategy to change
the way you influence others."

SCOTT STRATTEN, President of
UnMarketing Inc. and best-selling
author of the UnMarketing series

Phil M Jones

EXACTLY WHAT TO SAY

The Magic Words
for Influence
and Impact



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and Impact



I'm not sure if its for you, but



Open-minded

MOTIVATION

MOTIVATION

MOTIVE

ACTION

REASON TO MOVE

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EXACTLY WHAT TO SAY

The Magic Words
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and Impact

A photograph of two young girls with curly hair, each with a small bow, sitting on the floor of a white fabric tent. They are both focused on reading open books. The girl on the left is holding a small black object, possibly a toy microphone. To her left is a white lamp with a warm-toned shade, sitting on a stack of books. The tent is decorated with warm white string lights that create a cozy, intimate atmosphere. The background is softly lit, and the overall scene conveys a sense of quiet imagination and learning.

Just imagine

How would you feel if?



Who?

How?

What?



Why?

When?

Where?

LISTEN

SILENT

Who?

How?

What?



Why?

When?

Where?

Give enough information
to make a decision



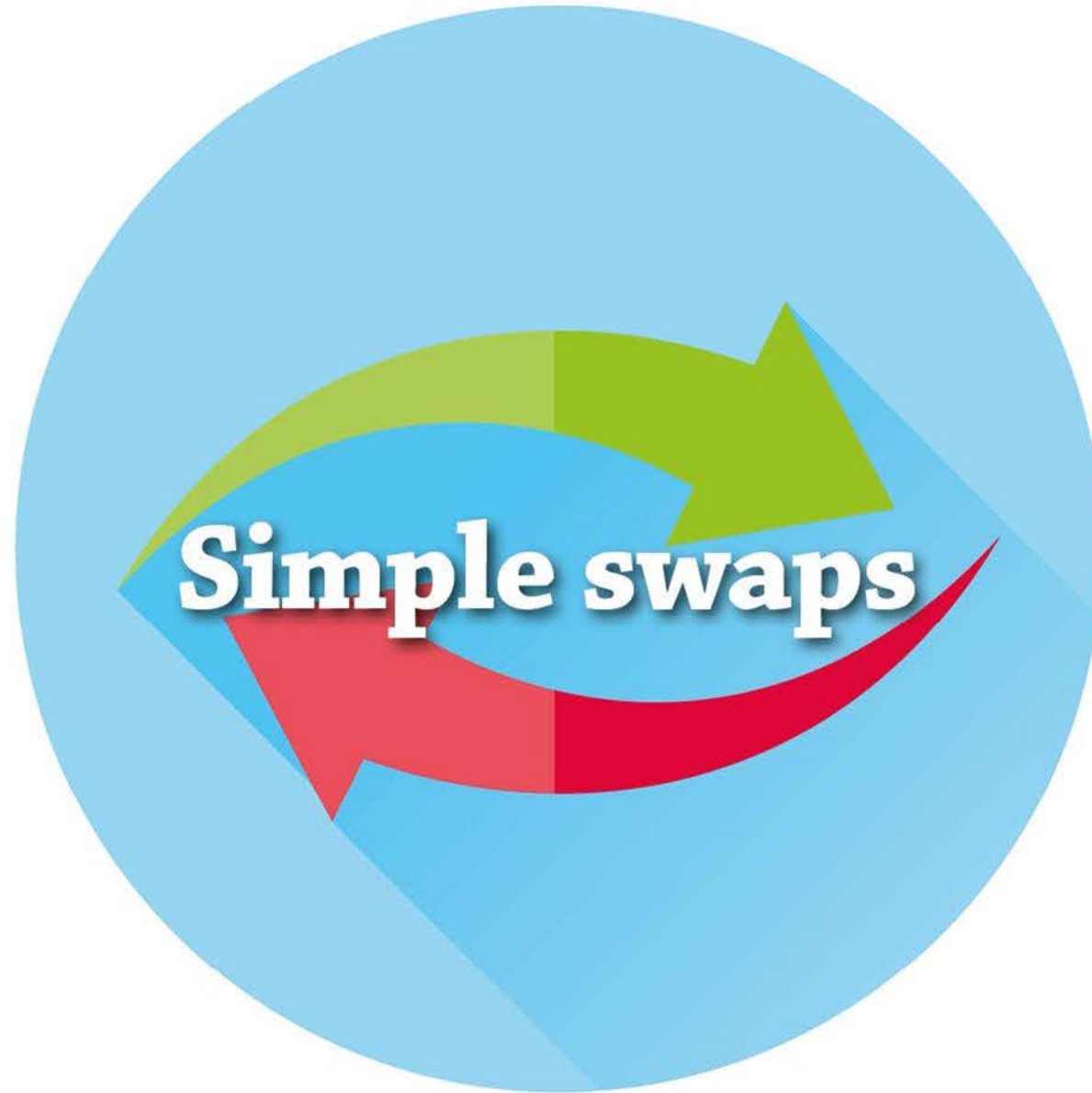
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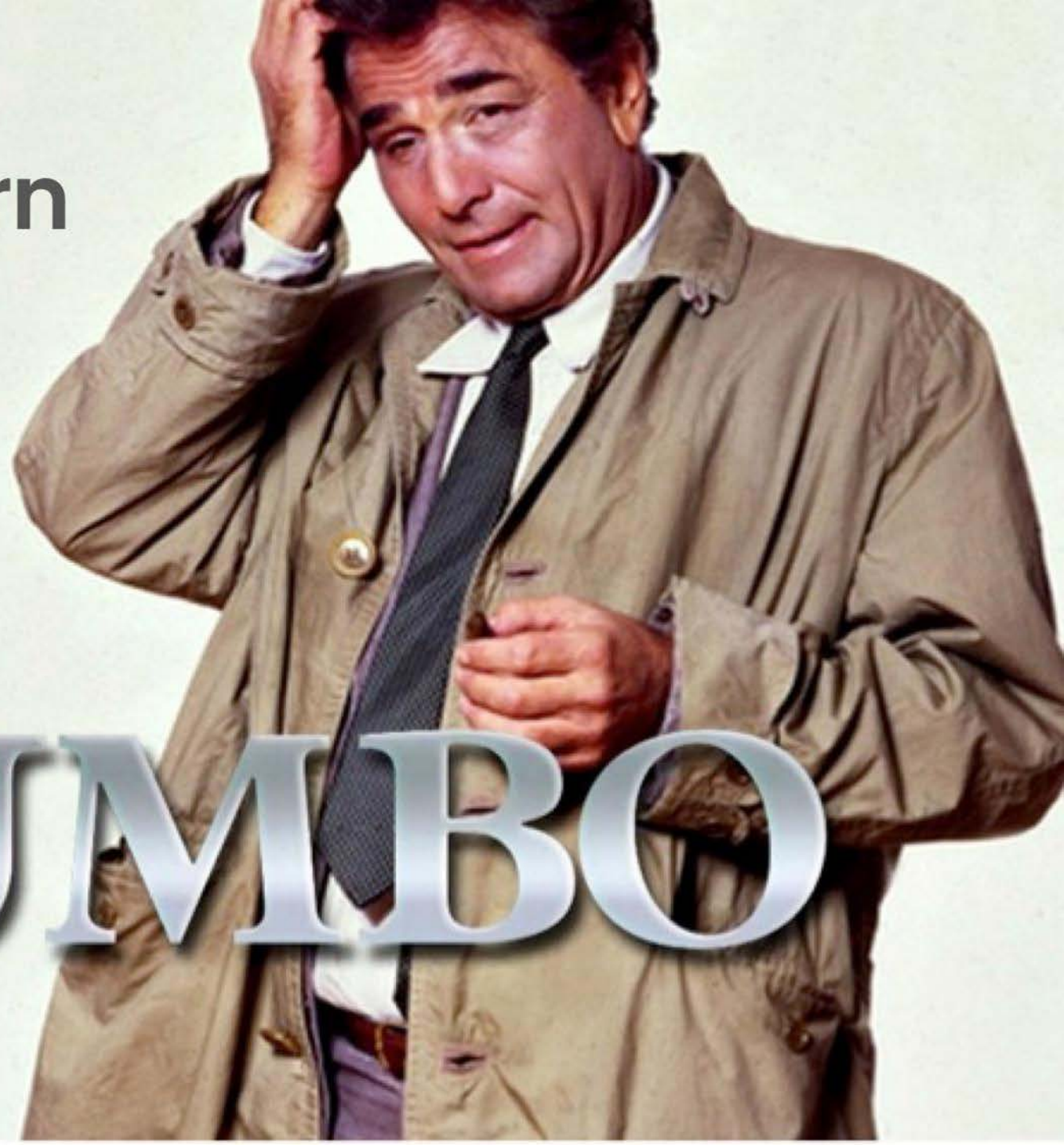
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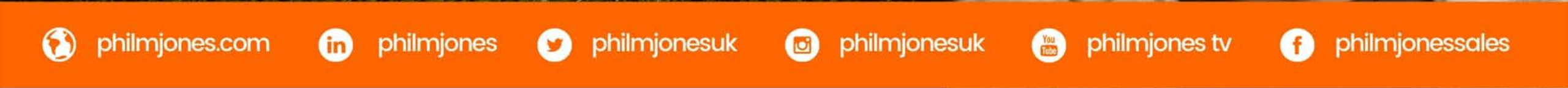
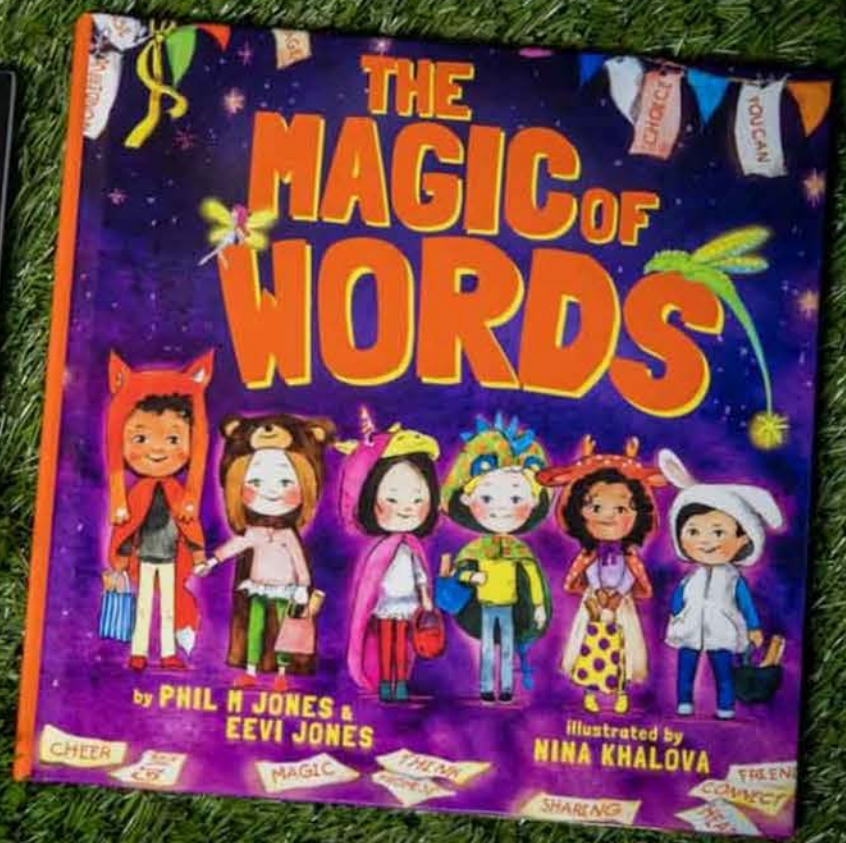
Most people

What can we learn
from this guy?



COLUMBO

philmjones
helping your business reach new heights



philmjones
make more of your conversations count



HOW ABOUT
A LITTLE BIT
OF MY SECRET
SAUCE?

**DOWNLOAD MY TOP 3 SCRIPTS
FOR NAVIGATING THE SHIFT!**

FOUND IN TF RESOURCE CENTER





TF TomFerry

SUCCESS SUMMIT

Contact Information

Dr. C. Fitzgerald Bell
Business Development Coach

Cbell@yourcoach.com

240.601.7503

IG: @drfitz17 | FB: /drfitz17

Janet Miller
COACH





Leadership

Be The Leader Your Market Needs

What A Leader Looks Like

A Leader ...

- Inspires passion
- Provides encouragement
- Motivates
- Ensures the community has support and the tools needed to achieve the community's goals.
- Practices effective cross-cultural communication

What A Leader Looks Like

A Leader is a ...

- Strategic thinker
- Visionary
- Ethical and civic minded

A leader understands ...

- The shares of the market

A leader defines ...

- The market share

Leadership is Positioning & Influence

To truly lead in your market, you should also be a leader in your community

The questions is...

Are you emotionally intelligent enough to handle the role of leadership.

Janet Miller
COACH



What Is Emotional Intelligence?

The ability to understand, use, and manage your own emotions in positive ways to relieve stress, **communicate effectively, empathize with others, overcome challenges and defuse conflict.**



Community Involvement



Protecting Your Position In The Market

Protecting Your Position In The Market

Protecting Your Leadership Position

In leading your marketplace there are numerous things you need to do to maintain your position.

- Recruiting (Duplicating Yourself / Likeminded People)
- Established culture and quality of service
- Understanding and knowing your market
- Community Engagement with Partners

Marketing Perspective

- 
- Your Brand Must Be Polished**
 - Advertise Your Leadership Position**
 - Stay involved with your community**
 - Promote Your Industry**
 - Know Your Competition**

Equipped And Understand Your People

Do's

- Know the needs of your clients, the community and your agents
- Identify your strengths as well as the weakness
- Know and understand the pulse of your culture that you're creating
- Be willing to follow, take direction and lead with authority

Don'ts

- Don't be afraid to fail forward
- Don't be so disconnect to where you don't recognize the shift within your market and community.

Thank You for Your Time & Attention



For More Information and/or Questions, Contact:

Dr. C. Fitzgerald Bell

Business Develop Coach



Cbell@yourcoach.com



@drfitz17



/drfitz17