

TF TomFerry™

SUCCESS SUMMIT

**RECESSION-PROOF  
YOUR BUSINESS**

Dallas, TX / August 23-25, 2022



# Exclusive Success Summit Coaching Offers!

THREE DAYS ONLY – SPEAK TO A CONSULTANT FOR DETAILS

**Success Summit** is the one time all year we offer our lowest prices and biggest guarantees!

**Be sure to speak to a consultant at the Coaching Booth for ALL the details!**

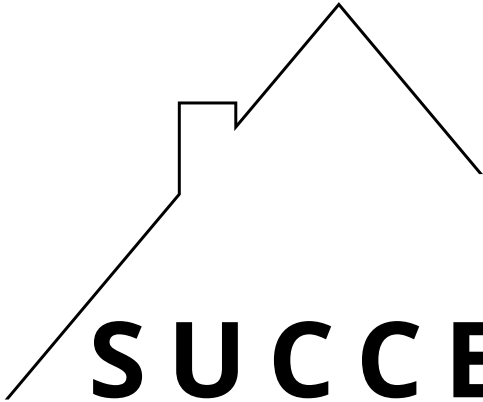
Ask about our **ELITE** and **TEAM GROWTH** programs for the largest discounts and bonuses!

**Commit to your future self today.**

Summit-exclusive coaching offers expire Thursday night.



VISIT THE COACHING BOOTH OR SIGN UP NOW AT [TOMFERRY.COM/JOIN](https://tomferry.com/join)



# SUCCESS SUMMIT

Name: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_



*Download your  
2022 Success  
Summit resources*

# Letter from Tom

Hey Rockstar,

We find ourselves in the middle of two extremes...

A little over two years ago, some agents weren't sure we'd ever be able to meet face-to-face with clients again.

Then everything flipped and demand for housing skyrocketed to the point we were seeing crazy bidding wars within minutes of listings hitting the market.

As the market normalizes, "normal" doesn't feel so normal after all.

So here at Summit, my goal is to help you dig in and prepare your business for what's ahead... in the weeks, months, and even years to come. I want to help you recession-proof your business!

I'll tell you this: it won't be as easy as it's been recently.

But the fact you're here tells me you're up to the challenge.

Let's make the next three days an all new beginning – because with everything you learn here, there's no limit to what you can achieve.

Thanks for trusting me for the next three days. It means the world to me,

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

Tom Ferry | CEO - Owner



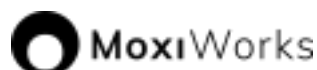


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# Thank you to our sponsors

## BoomTown!





There may be  
a recession;  
**I choose  
not to participate  
& do the work!**

A handwritten signature in black ink, appearing to read 'Tom J', located at the bottom center of the page.



**Click the button to access all of the Summit Challenge featured postcards!**

Then choose your favorite(s) and simply "R&D" (rip-off and duplicate). When you associate yourself with an ecosystem of the best agents in the business, there's no need to reinvent the wheel.



**Need video inspiration?**

Scan here to view the Summit Challenge winning videos! Which one will you re-create for your audience first?



@TomFerry



@TomFerry



@TomFerry



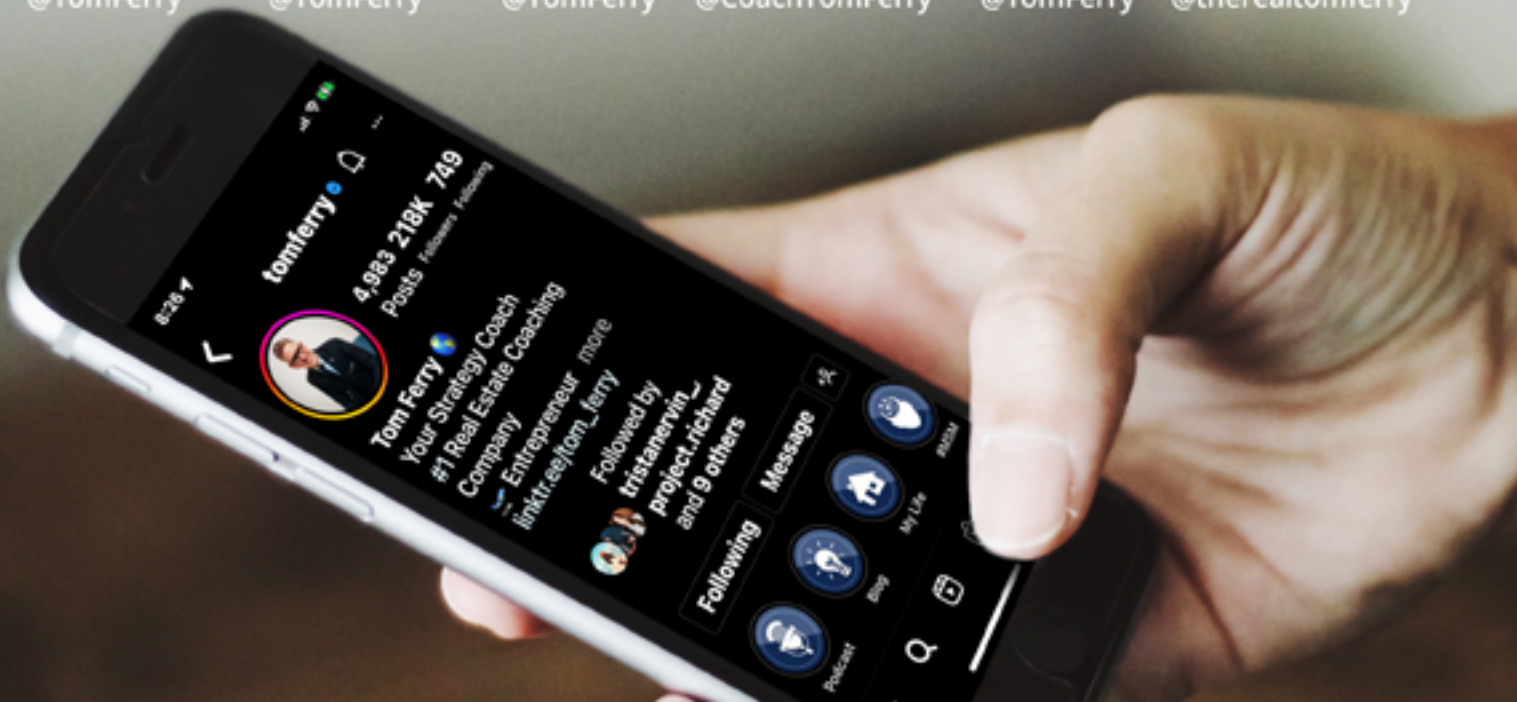
@CoachTomFerry



@TomFerry



@therealtomferry





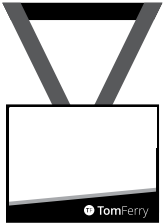


# FAQ



## IS THERE WI-FI?

Yes, here are the log-in details:  
SSID/Network: **SuccessSummit**  
Password: **TomFerry**



## DO I NEED TO WEAR MY NAME BADGE / LANYARD?

Yes! Attendees (and guests) must wear their name badge and lanyard at all times. Security will not allow anyone inside the main ballroom without credentials. A replacement badge and lanyard can be purchased at the customer service desk, in the Hall F Lobby for \$150.



## I LOST MY WORKBOOK. CAN I GET ANOTHER ONE?

Check with customer service in the Hall F Lobby to see if it was turned in. If you lose your workbook, a replacement workbook can be purchased for \$50. As a precaution, be sure to write your name and phone number in your workbook to help our team return it to you sooner.



## IS THERE A LOST & FOUND?

Lost and Found is located at the Customer Service desk in the Hall F Lobby.



## WHAT IS THE WRISTBAND FOR - DO I NEED ONE?

Wristbands were given to coaching members at check-in and are required for the coaching member exclusive party. Your wristband gets you in and has your drink tickets attached - so don't lose it. Replacements will be available for \$50 at Customer Service in the Hall F Lobby.



# FAQ



## WHERE CAN I BUY A SNACK OR LUNCH?

On-site cash and carry concessions will be available in the pre-function space of Hall F Lobby and Hall E. There are also food and beverage outlets at the Omni and restaurants on Lamar just across the skybridge in Convention Center D Lobby.



## WHO CAN I TALK TO ABOUT COACHING?

If you are interested in speaking with any of our top Business Coaches and Coaching Consultants, head to the Tom Ferry booth in the back of the main ballroom. You can also learn more by visiting [tomferry.com/join](http://tomferry.com/join) or calling 800-624-9575.



## WELCOME RECEPTION *All attendees welcome!*

*Tuesday, August 23rd, 5:00pm – 7:00pm*

Don't miss this opportunity to network and connect with the best in the industry!

After a day full of insights and learning, join us in the Dallas Ballroom at the Omni Hotel. Follow the skybridge from the Convention Center Lobby D and head up the escalators to the 3rd floor.

Cash bars will be available for drink purchases.



## TOM FERRY'S TEXAS TAKEOVER

*Wednesday, August 24th, 7:00pm*

*Exclusively for Coaching Members*

Get ready to get down at Gilley's with your Boots n' Bling!

I.D. and wristband (which includes your drink tickets) required for entry.

\*Time, locations and speakers were current as of press time and are subject to change.



Summit Scavenger Hunt

# Use the hashtags:

- #TFSummit22
- #FerryIntl
- #TomFerry

Post your photos/videos and tag **@ferryintl** on a social platform with the hashtags listed above

Please see the rules on the following page to participate!

- 1 winner selected per day*
- 3 chances to win*
- 1 bonus winner*

Prizes include TF Merch, 2023 Summit Ticket (*in-person or virtually*)



## Summit Scavenger Hunt



# DAY 01

**DAY ONE:** Post a pic by any Summit sign on social using **#TFSummit22 #TomFerry #FerryIntl** and tag **@ferryintl**

### Virtually

**DAY ONE:** Take a picture of your viewing setup or viewing party using **#TFSummit22 #TomFerry #FerryIntl** and tag **@ferryintl**

# DAY 02

**DAY TWO:** Post a pic with a new friend you met at Summit using **#TFSummit22 #TomFerry #FerryIntl** and tag **@ferryintl**

### Virtually

**DAY TWO:** Send a DM (direct message) on Instagram to **@ferryintl** with your big "WHY"



# DAY 03

**DAY THREE:** Post a pic with Summit merchandise using **#TFSummit22 #TomFerry #FerryIntl** and tag **@ferryintl**

### Virtually

**DAY THREE:** Post a video of your fun dance moves to your Instagram Stories and tag **@ferryintl**



# Bonus

Create an Instagram Reels of your Summit experience using **#TFSummit22 #TomFerry #FerryIntl** and tag **@ferryintl**





# AGENDA

For the most up-to-date agenda and schedule scan the QR code below:

## MONDAY, AUGUST 22

1:00PM - 7:00PM Early Check-in - *Kay Bailey Hutchison Convention Center Hall F Lobby*

## TUESDAY, AUGUST 23

7:30AM		Check-in
9:00AM	- 9:15AM	TomX - Intros
9:15AM	- 9:30AM	The Listing Presentation That Wins Every Time
9:30AM	- 9:45AM	Book 100 Appointments in the Next 12 Months... From One Simple Tactic
9:45AM	- 10:00AM	Breakdown to Breakthrough: It's Time to Get Real!
10:00AM	- 10:15AM	Journal the Journey: How Case Studies are the New "Just Sold"
10:15AM	- 10:30AM	Agent to Investor: Own 100 Doors in the Next Four Years
10:30AM	- 10:45AM	Mental Fortitude: Business Lessons from Conquering Everest
10:45AM	- 11:00AM	Broke No More: From Negative Net Worth to Multimillionaire
11:00AM	- 11:15AM	Maximum Impact: The Ultimate Listing Launch Strategy
11:15AM	- 11:30AM	Maximizing Momentum: How to Initiate the Flywheel Effect
11:30AM	- 1:00PM	Lunch Break ( <i>on your own</i> )
1:00PM	- 3:00PM	Recession-Proof Your Business
3:00PM	- 4:30PM	The Lead Generation Playbook - DEMAND
4:30PM	- 5:00PM	Key Driving Forces Changing Our Industry for the Better
5:00PM	- 7:00PM	Welcome Reception (all attendees welcome) - Dallas Ballroom, Omni Hotel



# AGENDA

## WEDNESDAY, AUGUST 24

8:00AM	-	8:30AM	Bonus Session: How a Dynamic Tech Stack Can Predict Your Future
8:30AM	-	9:00AM	Tom Ferry: Ask Me Anything
9:00AM	-	9:40AM	How to Be the Expert in Today's Market
9:40AM	-	10:00AM	Ladies of Listing Domination
10:00AM	-	11:50AM	The Lead Generation Playbook – BRAND
11:50AM	-	1:20PM	Lunch Break ( <i>on your own</i> )
1:20PM	-	2:10PM	Tom Ferry: Ask Me Anything
2:10PM	-	3:10PM	Launch Pad: New Agents Who Are Crushing It
3:10PM	-	3:40PM	Titans of Conversion
3:40PM	-	4:00PM	How AI is Transforming Sales Conversations
4:00PM	-	5:00PM	Live Listing Presentation Battle Royale
7:00PM			Tom's Texas Takeover (Coaching Members Only Reception)

## THURSDAY, AUGUST 25

8:30AM	-	9:00AM	Tom Ferry: Ask Me Anything
9:00AM	-	9:30AM	Reclaim Your Schedule... and Rejuvenate Your Life!
9:30AM	-	11:00AM	The Lead Generation Playbook – REFERRALS
11:00AM	-	12:30PM	Phil Jones: Exactly What to Say
12:30PM	-	2:00PM	Lunch Break ( <i>on your own</i> )
2:00PM	-	2:15PM	Tom Ferry: Ask Me Anything
2:15PM	-	3:00PM	Mega Agent Scripts
3:00PM	-	4:00PM	Leadership Becomes You: Becoming the Hero Your Market Needs
4:00PM	-	5:30PM	What Now: Your 2022/2023 Action Plan

All times approximate. Agenda subject to change.

WAKE UP  
KICK ASS  
REPEAT

**TF** TomFerry™



# SUMMIT Challenges from Tom



1

Shoot and post a MINIMUM of one video every day while you're here, including a wrap-up video explaining to your followers why you attended and how you can't wait to bring what you learned to your clients.

2

Meet and exchange business cards with potential referral partners from three of the biggest migration partner markets for your area. Then meet at least 10 more people from outside your market.

3

Sit in a different spot every day and eat lunch with people you don't know each day. You'll have plenty of time with friends after the event.

4

Embrace your role to educate and inform. Start a 30-day video challenge on your Instagram Stories. You can do Q&A or just provide a new quick tip every day.



A man with glasses, wearing a white shirt, a dark tie, and a dark vest, is speaking on a stage. He is gesturing with his right hand. The background is a blue screen with some faint text and graphics. In the foreground, the backs of several audience members' heads are visible, some holding up phones to record. A large white circular graphic is overlaid on the center of the image, containing the text 'TomX Speakers'.

**TomX  
Speakers**



Jacquie **OTHEN**

Toronto, Ontario

@theothengroup

The Listing Presentation That Wins Every Time

Notes:



David **CALDWELL**

Portland, OR

@davidccaldwell

Book 100 Appointments in the Next  
12 Months... From One Simple Tactic



Notes:



Alyssia **ESSIG**

Baltimore, MD

@alyssiaessig

Breakdown to Breakthrough: It's Time to Get Real!



Notes:



Robert **MACK**

Newport Beach, CA

@whyrobertmack

Journal the Journey: How Case Studies  
are the New “Just Sold”



Notes:



Lori **McGUIRE**

Laguna Niguel, CA

@mcguireteamrealestate

Agent to Investor: Own 100 Doors  
in the Next Four Years



Notes:



Krystopher **BENYAMEIN**

Orange County, California

@krysbenyamein

Mental Fortitude: Business Lessons  
from Conquering Everest



Notes:



Becky **BARRICK**

Tacoma, WA

@beckybarrickrealty

Broke No More: From Negative Net Worth  
to Multimillionaire



Notes:





Gia **SILVA**

Long Beach, CA

@giasilva.lb

Maximum Impact: The Ultimate  
Listing Launch Strategy



Notes:



Tom **TOOLE**

Greater Philadelphia, PA

@tomtoole3rd

Maximizing Momentum: How to  
Initiate the Flywheel Effect



Notes:



Through chaos,  
**there's always  
opportunity!**

A handwritten signature in black ink, appearing to read "Tom J".



01

Recession-Proof  
Your Business



**Recession-Proof Your Business**



**Recession-Proof Your Business**



**Recession-Proof Your Business**



**Recession-Proof Your Business**





**Recession-Proof Your Business**



**Recession-Proof Your Business**



# Actions


What am I committed to?

What new resources/people are required?

What new routine/discipline?

What happens if I don't execute?

What happens when I do?

A man with glasses, wearing a white shirt, a dark vest, and a purple tie, is speaking on a stage. He has a microphone clipped to his shirt and is gesturing with his hands. The background is blurred with warm lights.

02

The Lead Generation  
Playbook - **DEMAND**

Tom Ferry



The Lead Generation Playbook – DEMAND



The Lead Generation Playbook – DEMAND



The Lead Generation Playbook – DEMAND



The Lead Generation Playbook – DEMAND





The Lead Generation Playbook – DEMAND



# Actions

What am I committed to?

What new resources/people are required?

What new routine/discipline?

What happens if I don't execute?

What happens when I do?



# Realtor.com Success is in the System

## A Case Study with Nikki Weiss



Years in Real Estate: **7**  
2021 GCI: **\$2,300,832**  
2021 Transactions: **182**  
2021 Volume: **\$83,558,872**

### By the Numbers

Return on Investment: **5X**  
% of business attributable to realtor.com: **47%**  
New agent conversion rate\*: **1%-2%**  
Experienced agent conversion rate: **4%-6%**  
Roughly: **100 buyer conversations = 1-2 sales in next 90 days**  
Average monthly investment: **\$14,000 per month**  
Team agent size: **15**  
Average leads to agents per month: **25\*\***  
Breakdown of conversion time (from leads received to when leads closed):

	2020	2021	YTD 2022(6/12/22)
0-3 months	45	31	18
3-6 months	14	21	6
6-12 months	18	24	10
12+ months	28	19	16

\* So a 2% conversion rate means that, for every 100 leads the agent receives, they end up with 2 closed transactions.

\*\* Not all agents take leads.



**Sarasota Home Specialists**  
**Sarasota, FL**  
**nikki@srqhomespecialists.com**  
**IG: @sarasotahomespecialists**

### WHY REALTOR.COM

Realtor.com is the second most visited real estate listings website in the United States, with over 100 million monthly active users. If you are going to use paid leads, you need to consider which company has the greatest potential, not only for ROI, but for the method of acquisition and potential for conversion. You might also consider how platforms change over time.



## NIKKI'S APPROACH

### Philosophy

Plan, measure and operationalize everything.

### Budget

- Calculate how many leads your team can handle each month.
- Calculate how many ZIP codes you need to buy into to get that many leads.
- Based on conservative assumptions about conversion ratios, calculate how many leads you will need to purchase for one conversion.
- Make sure you have enough cash on hand to keep consistently buying leads.

### Strategy

- Purchase your leads around your team. In other words, if some agents are well positioned to sell in specific ZIP codes, you need to work to the strengths of those agents.
- Make sure whatever areas you buy into, either you or one of your agents is an expert in that area. It's critical that you have meaningful conversations about neighborhoods.
- The key is to speak to the lead and have a qualifying conversation.
- Qualify by using LPMAMA.

### Lead Distribution

- Nikki uses a "shark tank" where leads are placed in a pool available to all agents. The first to claim the lead is the one who gets it.
- There is an unwritten rule that if you can't answer a lead and actually have a valid qualifying conversation with them, don't claim it. Likewise, if you don't know the area related to the lead or you're not willing to drive to that area, then don't take the lead – let somebody else claim it.
- Don't add unnecessary filters to your lead distribution system that can slow down response rates. For example, you could specify that a good closer in a certain area has first dibs on any lead from that area. However, if that agent doesn't respond it needs to go to someone else – fast. Time is of the essence.
- Know the lead capacity of agents
- Newer agents who are building their book should receive between 20–25 leads per month.
- More experienced agents who already have leads in their pipeline whom they are nurturing, should be getting 15–20 leads per month.
- Agents with large client databases they are working besides new leads should receive between 10–15.
- Nikki uses Boomtown for lead distribution.



Demand



### Rules of the Game

- Every agent must follow the team's process.
- Every call needs to be entered into the CRM. If it's not, it doesn't exist. If you're not doing your job, your leads get turned off.
- Once an agent has had a conversation, they need to log their call and set it for the proper alerts according to a lead flow chart.
- Leads who have not been followed up with in over a month must be returned to the pond. If the agent doesn't do so within 3 days, their lead supply is stopped.

### Lead Management Checklists

Nikki has drip campaigns with detailed templates and checklists to assure all leads are properly nurtured. All leads get assigned to a nurture plan as long as there is a valid email associated with them.

- "21 Day Pain or Gain" Nurture – This campaign is for all new leads. Leads stay here until contact is made and another filter can be applied. If no contact is made within the 21 days, they are moved to Nurture 3.
- Nurture 1 – This campaign is for leads likely to do business in 3 to 6 months.
- Nurture 2 – This campaign is for leads that are likely to do business within 6 to 12 months. In some situations, Nurture 2

may still be appropriate for leads who are likely to transact as far as 18 months out. This would be the case for people who have a clearly defined trigger event such as a set retirement date or a date when a child moves out.

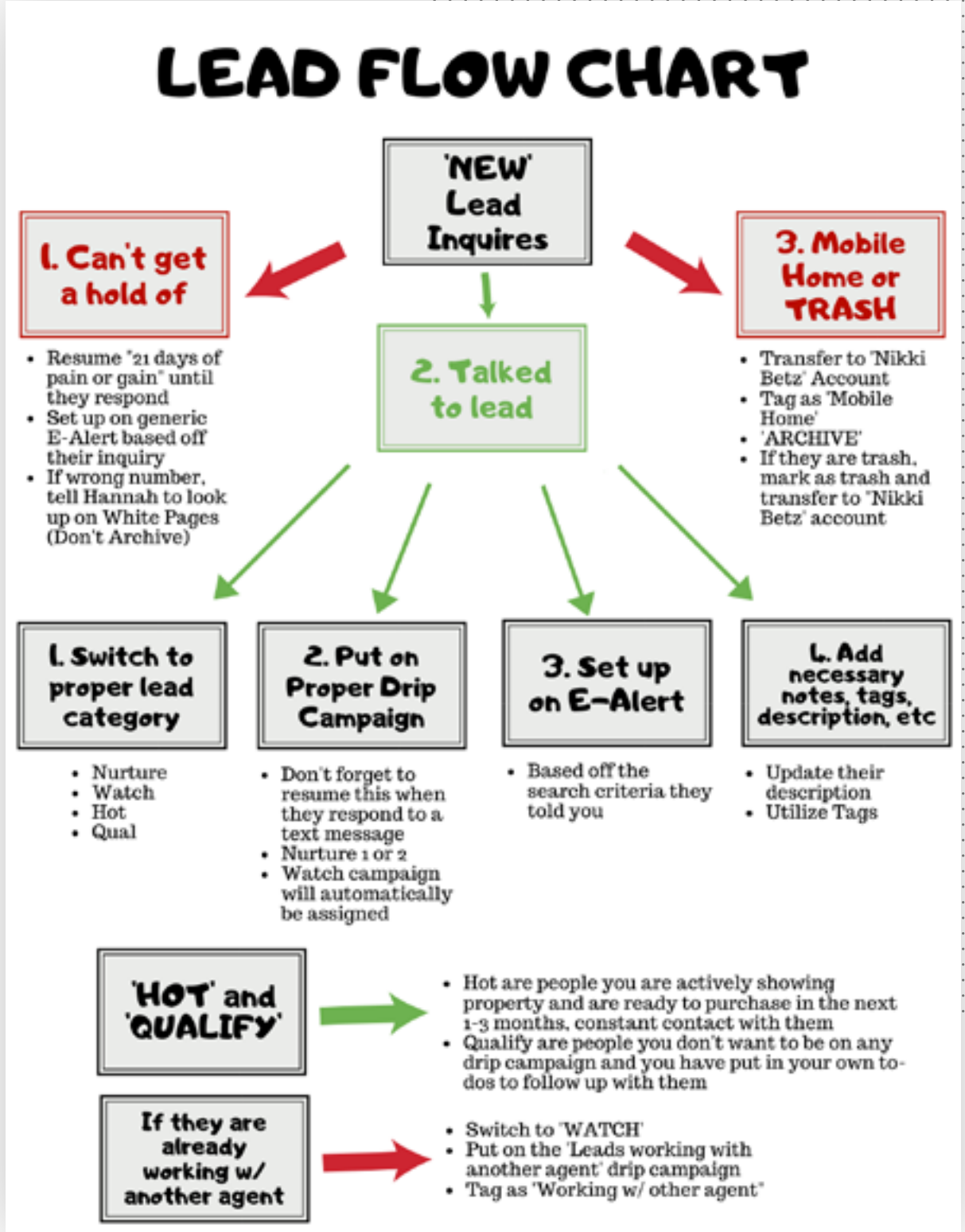
- Nurture 3 – This campaign is for leads with whom no connection is made during the 21 Day Pain or Gain. Leads that are not responding to follow-up calls but are still still viewing properties on their e-alerts are not assigned to this plan as the goal is to re-engage with them in every possible way possible.

It is worth noting that the majority of emails are BombBombs. Onboarding for every new agent entails being trained in sending BombBombs. It is a condition for receiving leads.

### Accountability

- Nikki listens in on conversations at random to make sure agents are following scripts.
- Her ops manager makes sure agents enter notes into the CRM.
- Agents must track 3 numbers daily: leads obtained, conversations had, appointments set. Numbers are turned in daily on a Google Sheet
- Agents also must participate in specified team coaching calls.

NIKKI'S TOOLKIT



# NIKKI'S TOOLKIT



Click the button to see all of our Lead Generation Playbooks online

**'NEW' BUYER LEADS**  
21 DAYS OF PAIN OR GAIN

**DAY 1**  
Call immediately.

Automated Email: Bombbomb video introducing yourself (putting a name to the face), saying you'd be happy to answer any questions they may have about the property they inquired on or others, etc!

Automated Text: Hello, Nikki Betz here with Keller Williams Realty. Just received a notification that you are interested in a property, would you like to set up a showing?

**DAY 2**  
Automated Text: Hi! I tried to call, text, and email yesterday... is today a better day to reach you?

**DAY 3**  
Try Calling Again.

Automated Text: Hi (visitorFirstname) just checking in again to see what your time frame for purchasing is. Would be happy to assist you in your home search. Choose a letter below: A) within 3 months B) 6 months C) not sure just browsing Thank you! Nikki Betz Keller Williams

+Set them up on an i-Alert

**DAY 4**  
Try Calling Again.

Automated Text: Are you wanting to schedule a time to look at properties? If so, which properties are you interested in?

**DAY 5**  
Automated Email: Bombbomb video checking in to see if they are still interested in the property or if there are any questions they can answer

Automated Text: Are you available this week to meet at my office or we could meet for coffee to discuss your home search?

**DAY 6**  
Try Calling Again.

Automated Email: Hi me again... I want to learn how I can help with your home buying process? Do you need a lender recommendation and are just not sure what you might be approved for? If you would like, I have time this week. We could meet at my office to go over a plan or simply see what we can do to help?

Check out my calendar to schedule a time to meet with me: [calendly.com/sarasotahomespecialists](http://calendly.com/sarasotahomespecialists)

[Agent Signature]

Automated Text: Are you currently out of town? If so, when will you be available to visit?

**DAY 7**  
Automated Email: Hello (visitorFirstname), A few days ago you inquired on a property listing and I have tried to reach out to you multiple times via phone, text, of course, email. I'm sure you have questions, or possibly getting close to wanting to look at properties currently on the market to compare to the one you inquired on. To make your search easier use my website [Nikki.SarasotaHomeSpecialists.com](http://Nikki.SarasotaHomeSpecialists.com). Look forward to hearing from you. [Agent Signature]

**DAY 8**  
Check in call.

Automated Text: Nikki Betz here with Keller Williams Realty. It's important to me to know how I can help. Are you interested in New Construction opportunities here in the area? Feel free to check out my website [Nikki.SarasotaHomeSpecialists.com](http://Nikki.SarasotaHomeSpecialists.com)

**DAY 9**  
Automated Text: I don't want to keep bothering you so please let me know how I can assist or if you've decided to hold your search if you don't think you will be ready for a year or two that's fine... it's not too early to learn the market and market trends.

**DAY 10**  
Try Calling Again.

Automated Email: As you can see I'm persistent... What can I do to help? Are you interested in learning about the team my husband and I have and how we can help you make the one of the biggest purchases you will make in your life as easy, painless, & smooth for you as possible? If YES? Then let me know when the best time is to connect with you?

Automated Text: Do you need to sell your home first? We can help with that!

**DAY 11**  
Try Calling Again.

Automated Text: My now I'm guessing I have the wrong number? If you forgot who I am... This is Nikki Betz with Sarasota Home Specialists Keller Williams!

**DAY 12**  
Automated Email: I just wanted to send a quick note to see if you were receiving my listing email updates. I know that sometimes they get sent straight to spam so I wanted to make sure they were being delivered to your inbox. Please let me know if I need to make any adjustments in the properties I'm sending to you. I look forward to hearing from you soon!

Automated Text: I don't like to give up, so in a last effort to connect with you... would you be interested in speaking to my husband or assistant Hannah?

**DAY 13**  
Try Calling Again.

Automated Email: Hello, it's Nikki again... My husband and I take pride in providing the best customer service, the best customer experience, and the best home buying or selling experience possible! I know you might be busy or you just started to check out the area, but every opportunity/client is very important to us and our success. It's important that I connect with you at some time, whether it's today, 6 months from now, a year from now, that's fine. Just let me know in the mean time PLEASE use our website as it is the best tool for you to get the most accurate information in real time!

**DAY 14**  
Try Calling Again.

Automated Email: Bombbomb video seeing if there's a better number you can reach them at?

If still no response, Switch them to a different id campaign.

**'NEW' SELLER LEADS**  
SELLER QUALIFY PLAN

**DAY 1**  
Call immediately.

Automated Text: Hi (visitorFirstname) here with Keller Williams - I'm here to help you with anything you'd like to know about your property as I know this home better than most! I'll send a simple email if you need more info or a quick tour (video tour or call) to see how this works for you!

**DAY 2**  
Automated Text: Thank you for reaching out to us! We're excited to hear you're considering our website & contacting a realtor looking to sell in the next 1-6 months! Let's get started!

**DAY 3**  
Automated Email: Hi (visitorFirstname) & (visitorLastname) I'm here to help you with anything you'd like to know about your property as I know this home better than most! I'll send a simple email if you need more info or a quick tour (video tour or call) to see how this works for you!

1 - You are looking for a realtor to help you sell your home in the next 1-6 months?  
2 - You are looking for a realtor to help you sell your home in the next 6-12 months?  
3 - You are looking for a realtor to help you sell your home in the next 12-18 months?  
4 - You are looking for a realtor to help you sell your home in the next 18-24 months?

Check all that apply if they have to currently live where property appears to be sold

**DAY 4**  
Automated Email: Thank you for reaching out to us! We're excited to hear you're considering our website & contacting a realtor looking to sell in the next 1-6 months! Let's get started!

Try calling again.

**DAY 5**  
Automated Email: Hi (visitorFirstname) & (visitorLastname) I'm here to help you with anything you'd like to know about your property as I know this home better than most! I'll send a simple email if you need more info or a quick tour (video tour or call) to see how this works for you!

1 - You are looking for a realtor to help you sell your home in the next 1-6 months?  
2 - You are looking for a realtor to help you sell your home in the next 6-12 months?  
3 - You are looking for a realtor to help you sell your home in the next 12-18 months?  
4 - You are looking for a realtor to help you sell your home in the next 18-24 months?

**DAY 7**  
Check in call.

Automated Email: Hello (visitorFirstname) & (visitorLastname) I'm here to help you with anything you'd like to know about your property as I know this home better than most! I'll send a simple email if you need more info or a quick tour (video tour or call) to see how this works for you!

**DAY 10**  
Check in call.

Automated Email: Hi (visitorFirstname) & (visitorLastname) I'm here to help you with anything you'd like to know about your property as I know this home better than most! I'll send a simple email if you need more info or a quick tour (video tour or call) to see how this works for you!

**DAY 12**  
Check in call.

Automated Email: Hi (visitorFirstname) & (visitorLastname) I'm here to help you with anything you'd like to know about your property as I know this home better than most! I'll send a simple email if you need more info or a quick tour (video tour or call) to see how this works for you!

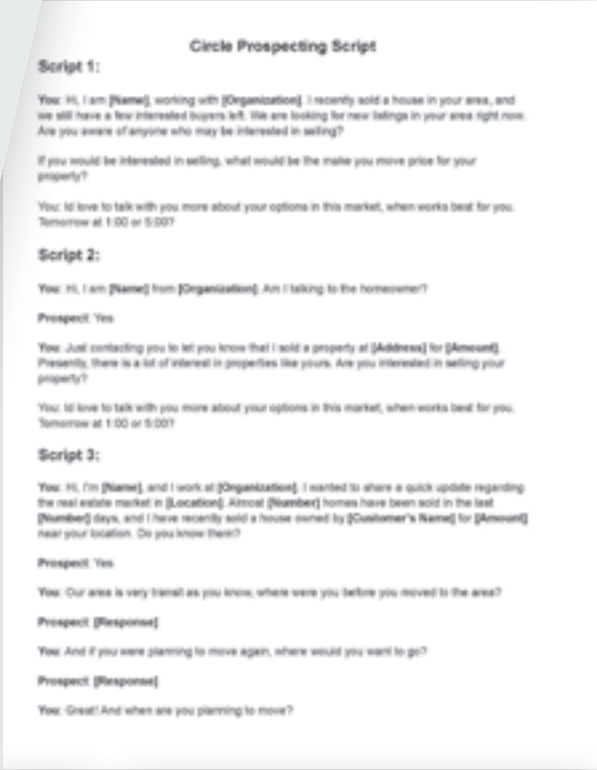
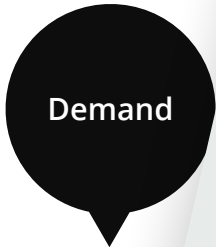
**DAY 15**  
Check in call.

Automated Email: Hi (visitorFirstname) & (visitorLastname) I'm here to help you with anything you'd like to know about your property as I know this home better than most! I'll send a simple email if you need more info or a quick tour (video tour or call) to see how this works for you!

**DAY 18**  
Check in call.

Automated Email: Hi (visitorFirstname) & (visitorLastname) I'm here to help you with anything you'd like to know about your property as I know this home better than most! I'll send a simple email if you need more info or a quick tour (video tour or call) to see how this works for you!

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## 6 THINGS NIKKI WILL DO GOING FORWARD

1. Revise all online lead buyer scripts and campaigns with changing market by end of this month and implement more direct video text, not just BombBomb.
2. Focus on memorization and role-play for new scripts with each agent using mass group, partners and self-recording.
3. Keep tracking where the realtor.com buyer leads are moving from (current high results are Canada, PA, MI, WA, IL top markets) and implement our focus to those areas for increased agent referrals.
4. Implement a similar Zillow Flex protocol for agents to be allowed to get leads from the shark tank.
5. Increase conversion rate to 3.6% + average for all agents year-over-year by

end of 2022 and 4%+ for 2023.

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

## 3 THINGS YOU CAN DO NOW

1. Use Nikki's ratios to establish a benchmark for yourself. Calculate what it would cost in your area to produce one sale. Create a budget and see if you can realistically commit to investing in paid leads over a reasonable period of time.
2. Establish your systems before you start. Know how you will handle leads, and if a team, how you will distribute them.
3. Have consistent follow-up processes in place.

## NIKKI ON COACHING

"If there isn't someone holding you accountable and as a resource to assist you grow your own path in this industry, you can't expect to have it happen without coaching."



# Open House Sign Ins Are Buy Ins

A Case Study with Stephanie Younger



Demand

**Stephanie Younger Group**  
Los Angeles, CA  
hello@stephanieyounger.com  
IG: @stephanieyounger

**Years in Real Estate: 19**  
**2021 GCI: \$9,850,000**  
**2021 Transactions: 301**  
**2021 Volume: \$424,200,000**

## By the Numbers

Agents on team: **24**  
Open houses 2021 = **480**  
% of business attributable to open house: **19%**  
Contacts obtained from open houses in 2021:  
**19,200**  
Percent of leads per contact obtained: **5%**  
Conversion rate of viable open house leads:  
**20%** (so almost 1 sale per three open houses)  
Average lead generation time to close:  
**4-5 months**

## WHY OPEN HOUSE

Open houses are like merchandise displays. Every open house means your store is open for business. And the more your store is open, the more leads you get.



## STEPHANIE'S TEAM APPROACH

### Background

When Stephanie did research to assess the efficacy of open houses, it provoked an interesting question.

**The question:** Would it be worthwhile to do open houses two days in a row over the weekend to create more exposure for the home and more opportunities for the team agents?

**The concern:** Would the open houses feel less well attended? Would this undermine the "perception of demand" and decrease the buyer's sense of urgency? Would a second day simply dilute the visitors from one day and divert them to the other?

**The test:** Do a number of two-day open house weekends and track the responses.

**The result:** The attendance was even better for both days. The two days allowed more potential buyers to attend in the initial launch weekend, and buyers who were really interested had an opportunity to visit the home multiple times, thereby increasing their certainty and decreasing escrow cancellations.

**The decision:** Do multiple open houses during the initial launch weekends for a single house.

### Philosophy

The more names you leave with, the better. Get everyone to sign in. And, of course, make the experience as pleasant as possible.

### Marketing

- Use the standard digital platforms for announcing the open house.
- Also, advertise in the local print publications that have real estate news. Because of the size of Stephanie's team, she's able to take out a full-page ad each week.
- Incentivize with something special - such as ice cream (but make sure it's the kind that doesn't drip!).
- Reach out to the neighbors through door knocking. They, like all those you are reaching through print and digital publications, need to learn and be reminded of your name and brand.
- Have marketing materials available during the open house that show what differentiates your service.
- Include a list that shares information about the local schools, market data, distinctive features regarding the neighborhood. The more visuals, graphs and pictures, the better.
- Post on Instagram and other social media.



Demand



## STEPHANIE ON COACHING

“The network of other team leaders with relevant knowledge and experience has helped me to be better aware of our strengths as a team, and to identify the areas where we can level ourselves up to be better leaders. My coach’s personal experience and engaged approach, along with Tom’s deep knowledge and insightful strategies, is helping us build into an even stronger, more profitable, and more productive team.”



### Process

- Agents arrive one hour early to prepare the house.
- A set music playlist is used uniformly in all houses for all showings. It is a subconscious way of branding the experience and differentiating a Stephanie Younger Group open house from any other.
- Stephanie’s team lays out a map of the area with specific communities and neighborhoods outlined and color-coded. It’s a curiosity piece more than anything, but the goal is to get people to linger and have a positive, unique experience.
- Don’t have people sign in electronically. It takes more time for people to type than write their names, yes, and it also gives some people the impression that you’ll be putting their names into an automated database. If you have people sign in by writing, their defenses go down, and you are more likely to get accurate information, and more able to refer back to that information in your conversation with the guest.
- Fill in the first line of the sign-in sheet yourself. Fill it in completely and legibly. This is a prompt. No one wants to be the first on a list, but if they see that someone




Click the button to see all of our Lead Generation Playbooks online

else has signed in, completely and legibly, they'll do the same.

- If someone says they have an agent, ask who it is. People can't come up with names on the fly. If they do indeed have someone they're starting to work with, ask if they've done a "strategic consultation." Chances are they haven't, which is your opportunity to schedule a meeting. So the goal is to have consultations with as many people as possible.
- Take notes on visitors - their comments, interests and anything else that can help you personalize the follow-up.
- Buyer leads go to the buyer agent holding the open house.

### Follow-Up

- On the same day, follow up with a call, text, or video. Let them know if you have off-market properties. (Know your regional rules on discussing off-market properties.)
- Based on what you've learned about them, segment them and put them into your lead management system which should then automate the cadence and manner of your future follow-up.



Demand

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## 6 THINGS STEPHANIE'S TEAM WILL DO GOING FORWARD

To increase the effectiveness of open houses in a shifting market, we will add the following 5 steps into our existing open house strategy:

1. Open House Agent will doorknock at least 100 homes in the immediate neighborhood prior to the open house.
2. Reintroduce "mega open house" on a strategic basis and use the power of targeted mail and email lists to invite the community.
3. Open house agents will post video content to social from open house to invite their followers and, at the end, will record a video to text open house attendees at the end to thank them for coming.
4. Open house agents will leverage the power of our virtual assistants to enter visitor contact information into

CRM and apply auto-action plans, and into Yopo for same day digital retargeting.

5. Use a case study model to market to the farm after the open house via mail and doorknocking. The case study will outline the success of our process and show that an excellent listing strategy can yield a successful outcome in any real estate market.
6. Work with our Tom Ferry coach to help us implement and hold us accountable!

## 3 THINGS YOU CAN DO NOW

1. Start scheduling open houses on Saturdays and Sundays – at a minimum.
2. Get the names, emails and phone numbers of as many people as you can.
3. Follow up. A house is a big ticket item, so be patient.





# Open House Kit (Supply List)

## General

- Portable Speaker System with Phone/iPod with approved SYG playlist of the season. Approved playlists are curated seasonally by Geoff Taylor on Spotify.
- Charger or Battery for Speakers and/or Digital Music Player.
- Sign-In Sheets (Recommend 20 copies on hand)
- 2 Clipboards
- 1 or 2 Brochure Stands
- SYG Pens
- Your (Open House Agent) Business Cards
- Lender Business Card/Contact Info

## Handouts

- Property Open House Flyer
- List of Other Open Houses
- Flyer of Other SYG Listings + Compass Concierge
- Map of the Neighborhood
- List of Schools
- Financial Flyers

## Marketing Items

- SYG Bottled Water
- Notepads
- Mints or other "Swag" Items

## Emergency Items

- Air Freshener Spray
- Candles
- Lighter
- Door Stops (Several, small and large)
- Tape
- Markers/Pens
- Binder Clips
- Hand Sanitizer
- Antibacterial Wipes
- First Aid Kit

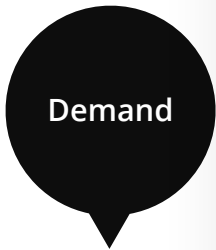
## Provided by SYG

- Hand Sanitizer Station
- Shoe Covers (as applicable)
- SYG Door Mat
- Masks (as needed)

## Rainy Day Items

- SYG Umbrellas
- Extra SYG Door Mats
- Paper Towels and White Towels
- Booties

Updated / June 12, 2022



Demand

A person in a dark suit and blue socks is running on a modern, light-colored staircase. The person is captured in mid-stride, with their right leg forward and left leg back. The background shows a modern building with a grid-like ceiling and a large wooden pillar on the right. A large black speech bubble is overlaid on the left side of the image, containing the number '03' and the text 'Key Driving Forces Changing Our Industry for the Better'.

# 03

**Key Driving Forces Changing  
Our Industry for the Better**





## Key Driving Forces Changing Our Industry for the Better



## Key Driving Forces Changing Our Industry for the Better



## Key Driving Forces Changing Our Industry for the Better



# Actions

What am I committed to?

What new resources/people are required?

What new routine/discipline?

What happens if I don't execute?

What happens when I do?



Key Driving Forces Changing Our Industry for the Better / Top 10 Actions

Top 10 Actions	By Who?	By When?	Expectation of \$/ROI
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			



# 04

**Bonus Session:**  
How a Dynamic Tech Stack  
Can Predict Your Future



**Bonus Session: How a Dynamic Tech Stack Can Predict Your Future**



**Bonus Session: How a Dynamic Tech Stack Can Predict Your Future**





# Actions

What am I committed to?

What new resources/people are required?

What new routine/discipline?

What happens if I don't execute?

What happens when I do?



05

How to Be the Expert  
in Today's Market

David Childers



## How to Be the Expert in Today's Market



## How to Be the Expert in Today's Market



How to Be the Expert in Today's Market



How to Be the Expert in Today's Market



# Actions


What am I committed to?

What new resources/people are required?

What new routine/discipline?

What happens if I don't execute?

What happens when I do?



06

**Ladies of Listing Domination**

Tom Ferry + Panel





Ladies of Listing Domination



07

The Lead Generation Playbook  
– **BRAND**

Jason Pantana



The Lead Generation Playbook – BRAND



The Lead Generation Playbook – BRAND



The Lead Generation Playbook – BRAND



The Lead Generation Playbook – BRAND



# Actions

What am I committed to?

What new resources/people are required?

What new routine/discipline?

What happens if I don't execute?

What happens when I do?



# Instagram Reels Massive Content = Massive Exposure

## A Case Study with Jeffrey Sabel



Years in Real Estate: **6**  
2021 GCI: **\$188,885**  
2021 Transactions: **22**  
2021 Volume: **\$7,224,319**

### By the Numbers

As of June, 2022

Followers: **33,733**

Last 90 days:

- **81 reels posted**
- **1,113 likes per reel (90,153 likes total)**
- **13 comments per reel (1,053 comments total)**
- **634 saves per reel (51,354 saves total)**
- **815 shares per reel average (66,015 shares)**
- **An average of one direct inbound call a day attributed to video**

Most viewed reel: **500,000+**

Money spent on Instagram advertising: **\$0.00**



Simply Vegas Real Estate  
Las Vegas, NV  
jeffrey@jeffreysabel.com  
IG: @JeffreySabel

### WHY INSTAGRAM REELS

9 out of every 10 Instagram users watch videos each week. If you're not leveraging video, you're not optimizing social media to promote your brand. By releasing content consistently and sending it to your database, it is working for you behind the scenes 24/7.





## JEFFREY'S APPROACH

### Background

- Jeffrey created his IG account 8/1/21 after Tom said to do the "30 Questions in 30 Days" challenge.
- Casually posted until 12/5/21 so his account grew to 260 followers.
- Committed to posting a couple posts per week and grew from 260 to 585 from 12/6/21 to 3/6/22.
- Saw his followers increase almost threefold from 3/7/22 to 3/14/22 whereupon he committed to doing 1 reel per day.
- As of June, 2022, he had 33.7K followers.
- As of June 2022, he committed to doing 2 reels per day. "The people with the largest brands on social media have started doing that so I am emulating their strategy. Their strategy is one longer video and one shorter – two per day."

### Philosophy

For Jeffrey, each video is a soldier in his army, consistently getting his message out. Some of his videos are still being shared weeks or months after they are first released. The best part is, all this content which is released daily can be easily prepared in a single day each month.

### Strategy

- Plan your content.
  - Use answerthepublic.com to find the questions people in your area are asking, then write short scripts for each one with a basic problem/solution outline.
- Study other great Instagram accounts and steal the strategies that work best.
- Try not to speak for specific areas or demographics too often, as generalized content performs better.
- Batch an entire month's worth of video in a single day.
  - For Jeffrey, this takes about eight hours.
  - He does not auto-schedule his videos or follow a planned release calendar. Rather, he relies on his gut to know which one feels right for the day. It takes about 20 minutes to upload a video each day, equaling 10 hours spent on video each month.
- Get the tone and technical aspects right.
  - Instagram's algorithm does not boost based on content but on lighting and audio quality. Jeffrey films on his ZV-1 and uses a parabolic light for even exposure.
  - Keep it informal. Jeffrey films outside the office. He doesn't use a script for



shorter videos and instead speaks casually as if having a conversation with the audience.

- Jeffrey notices that his shorter content tends to perform better, so he tries to keep his clips around 15–20 seconds.
- Leverage one piece of content for another.
- Jeffrey's Instagram bio is linked to his Linktree. From there, you can view several of his most important longform YouTube videos right on the front page. This is a great way to use your short-form to boost your heavier content.
- When Jeffrey writes a script on an important topic that runs a little too long but reads well, he'll cut the video down to its most basic element for the video and post a more detailed

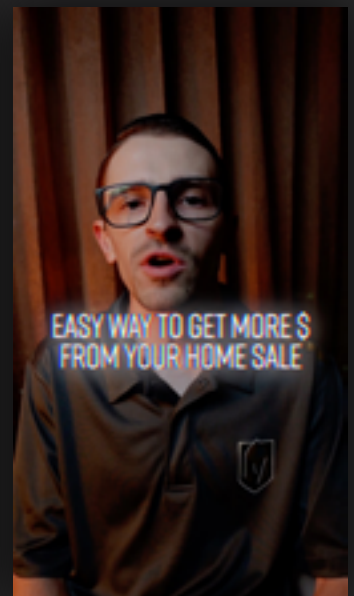
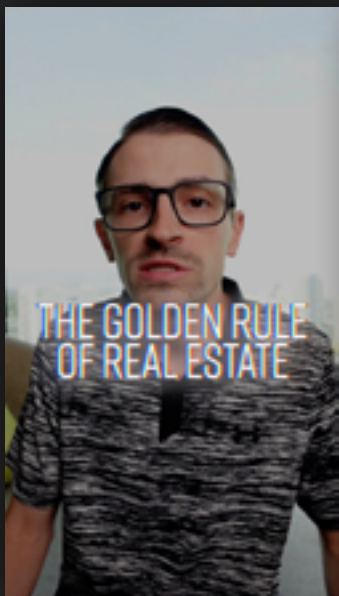
explanation in the video description. This receives fantastic responses.

### Tracking Progress

There are three data points which tell the biggest story on your videos performance:

1. Engagement - If people are engaging, the content is resonating. Jeffrey can then identify what makes those videos unique and produce similar content.
2. Followers - Growth in followers is the clearest indicator that his content is relevant.
3. Attribution - Every time a new lead contacts Jeffrey, he always makes sure to ask how they found him. If it is through Instagram, he asks which video they found him through

## JEFFREY'S TOOLKIT





## 6 THINGS JEFFREY WILL DO GOING FORWARD

1. Do more of what's already working. Get more intentional with it. One of my goals for next month was "more of less." I'm looking to double down on quality. My current content is very polished and I'm proud of it, but I want to cut down the volume of content and go deeper on specific topics. Instead of 20 different topics, just 2-3 of the most popular.
2. Crowdsource more content. Get more intentional with comments and client concerns. I occasionally do this but I want to make it a habit to consistently ask my followers and clients what their specific concerns and questions are. I feel going live would be the best format for this. The best content comes from the consumer.
3. Have specific themed videos per day (like Tom does). One approach I'm doing next month is my reel every Friday (4 total) will be a very short version of my YouTube weekly feature. (I do two long form videos per month now and I'm expanding to weekly next month.) It's going to have a direct call to action to the link in my bio at the end. It will be structured differently, almost like a conversation and not my usual presentation.
4. Shift a lot of the shorter content into stories, not reels. I'm approaching this as

a behind the scenes/draft section. Not polished and not enough content for a dedicated post, but something that is very relevant for a specific day or week.

5. Audit everything after I've done a variety of approaches. Each month I've run a different cadence of posts. I've done 3 per week, every business day, every day, and two per day for at least 45 days each. I did longer ones like 45-60 seconds, mid-range ones like 25-35 seconds, and this month I did a ton of ultra short ones like 10-15 seconds. I have enough of a sample size to know what works and what doesn't work at all. For example when my traffic started dropping off a little I doubled down and felt I could work my way through it. It didn't work. Two posts per day slowed it down further. You can definitely oversaturate the platform. Based on all my data and people I talk to, I feel the 25-second ones 3-4 times per week with other layers like stories and a regular monthly live is the sweet spot.
6. Work with my Tom Ferry coach to help keep me accountable and to help me implement these ideas!



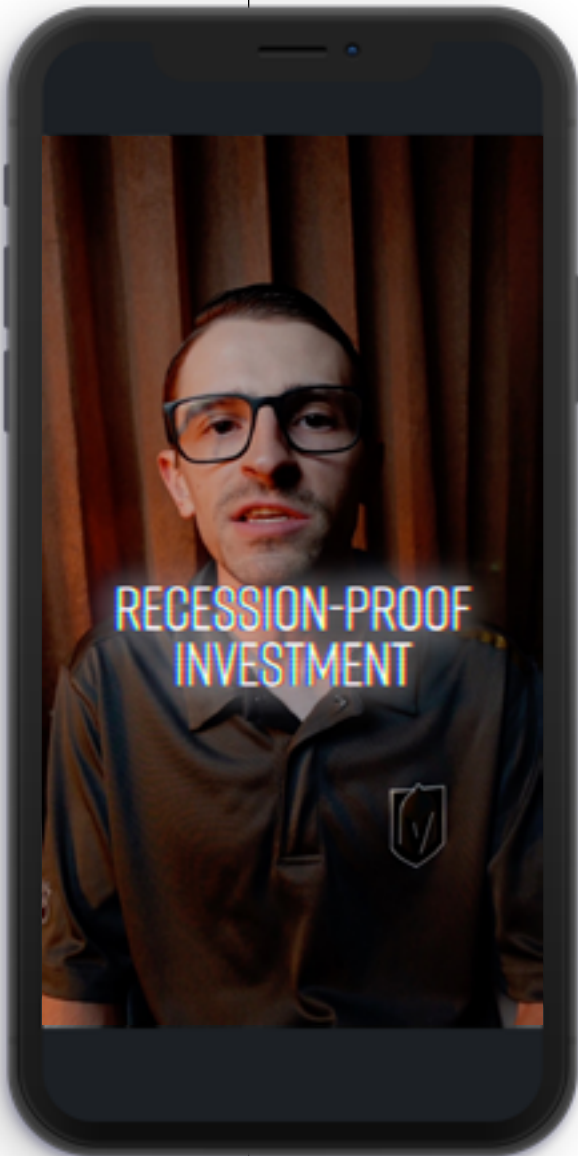


### 3 THINGS YOU CAN DO NOW

1. Set an appointment with yourself at the beginning of every month and batch film everything.
2. Go all in on Reels. Jeffrey personally believes this is the #1 marketing method we can use to grow a personal brand. Zero ad spend and massive reach.
3. Don't judge a video immediately. Have patience. Most of Jeffrey's top videos took off after 10-15 days and then consistently got traffic for a few weeks.

### JEFFREY ON COACHING

"Both of my coaches have been amazing, and this has been a complete overhaul in my business. The #1 ROI you can have is in personal development. If I could recommend you only make one investment, it would be in coaching. My current coach is one of the most important pieces in my business. Last year I upgraded to Elite and the weekly calls are essential to my business."



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# YouTube Capture Your Charisma

## A Case Study with Shannon Gillette



**Years in Real Estate: 16**  
**2021 GCI: \$1M**  
**2021 Transactions: 103**  
**2021 Volume: \$62M**

### By the Numbers

YouTube subscribers: **1.53K**  
Total number of videos = **107**  
Top video = **168K**  
1 Home tour = **43K views = 48 seconds**  
Total monthly views all videos = **543.3K**  
*(that's 6.5 million per year!)*  
Average view duration: **67%**  
Number of videos uploaded per month: **13**  
Average leads per month from all sources: **90**  
Average YouTube leads per month: **20**  
Number of YouTube leads to convert to 1 sale: **5**  
Money spent producing videos each month:  
**\$500 average per home tour video, \$50 per video for short form videos shot in studio.**  
Time spent on video production each month:  
**15 hours**



Gillette Group | Launch Real Estate  
Queen Creek, AZ  
shannon@gillette-group.com  
IG: @shannon\_gillette

### WHY YOUTUBE

YouTube helps you build brand, trust, and market reach. It's about being both a person and a professional. As Shannon says, "It's about having your face out there and inviting people into your life. That's how you get people to know, like, and trust you."



## SHANNON'S APPROACH

### Best Practices

- Stop the Excuses – Shannon is consistent with filming video. She is on each video and doesn't just upload home tours. She interviews local mayors and restaurant owners, shares vacation ideas, and answers frequently asked questions. She is now recognized in her town and gets daily calls from people looking to buy or sell.
- It's About Recognition – Shannon appears in almost every single one of her videos. She shares facts about herself, features her family, brings her audience in on her vacations and her home life. She's not afraid to be vulnerable and show the human aspects of herself. She ends every lifestyle video with, "Don't forget to follow me on Instagram."
- Create Relevant Content – Anytime clients ask the same question more than once, she makes a video to answer it. Her educational videos have not only brought new clients but have substantially improved client experience.
- Delegate Work – Before she hit her stride, Shannon was uploading all her own content and making the YouTube thumbnails herself. Now, on her coach's advice, she has hired a VA who does everything after the video is filmed. Shannon also goes to a studio with a videographer every two weeks so she can

batch her videos. She uses a separate videographer on an as-needed basis who can shoot things like home tours.

- Invest in the Right Tools – Shannon knows what works for her and sticks to it. She subscribes to TubeBuddy and Canva, both of which her VA is comfortable and proficient in using. She also creates an individual property website for every home she lists through relahq.com. This is the call to action on listing video tours.

### Helpful Tips

- Shannon shot one of her most popular videos with her cell phone, sharing travel tips to a local beach town in Mexico – a 4-hour drive from her home. She has sold homes from this video though it doesn't even talk about real estate!
- Tag the videos with what people are searching for: "Best Realtor in Chandler," for example.
- Have a thematic balance. Shannon's is:
  - 50% Home Tours
  - 25% Quick Facts and Frequently Asked Questions
  - 25% Lifestyle
- And shoot for the moon. The more you shoot, the more comfortable you will become. Everything is scary at first but becomes easier with time. Shannon now hosts a show called American Dream that airs locally on Fox.



Brand



## SHANNON'S TOOLKIT



# TIPS TO GET YOUR OFFER ACCEPTED

SHANNON GILLETTE



Click the button  
to see all of our  
Lead Generation  
Playbooks online



## 6 THINGS SHANNON WILL DO GOING FORWARD

1. Start adding more YouTube shorts. My VA is copying over my reels to YouTube.
2. Continue to think outside of just listing videos for posting, showing more behind the scenes Vlogs, my family, things to do around town, etc.
3. Add more movement for intros. Instead of standing still, more walking for intros.
4. Continue to understand some of the best performing videos of mine are not professionally filmed. I recently invested in some personal equipment (mic, stabilizer, etc.) to improve my cell phone videos. For example my family travel tip videos have thousands of views and have brought many new clients and they were filmed on my cell phone.
5. Plan to never get comfortable. I plan to invest time in keeping up with the video

and audio trends, following other agents and always improving on video.

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

## 3 THINGS YOU CAN DO NOW

1. Do it yourself or get help. Remember, no excuses. The key is to produce video! Some of Shannon's best performing videos were filmed on her cell phone.
2. Block out your calendar for video time. Anything can be a video – not just home tours. Family vacation ideas, hot spots, date night ideas, things to do, client appreciation events, etc.
3. Deliver value by answering the questions people are asking. If you don't know what people want to hear about, you can use sites like [answerthepublic.com](https://www.answerthepublic.com).








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Brand



## WHY COACHING COUNTS

“I was a skeptic of coaching for a long time. I had no idea how life-changing it would be. Now that I have a coach I wonder how I lived without one for so long. My coach helped me hire my VA, my coach holds me accountable, she sees potential in me that I don’t yet see in myself, and she now coaches my whole team. It has been a game changer. Hiring a coach should be a non-negotiable for anyone who wants to grow in the industry.”


A photograph of a modern, multi-level luxury house at night. The house features a dark, textured roof, large glass windows, and a wooden deck. The interior is visible through the glass, showing a dining area. The scene is illuminated by warm interior lights and outdoor lighting. A large white circular graphic with a black outline is centered over the image, containing the number '08'.

08

**The Future of Luxury**  
Tom Ferry + Panel



## The Future of Luxury



09

**Launch Pad: New Agents  
Who Are Crushing It**  
Tom Ferry + Panel



Launch Pad: New Agents Who Are Crushing It



10

**Titans of Conversion**  
Tom Ferry + Panel



## Titans of Conversion



## Titans of Conversion





# Actions

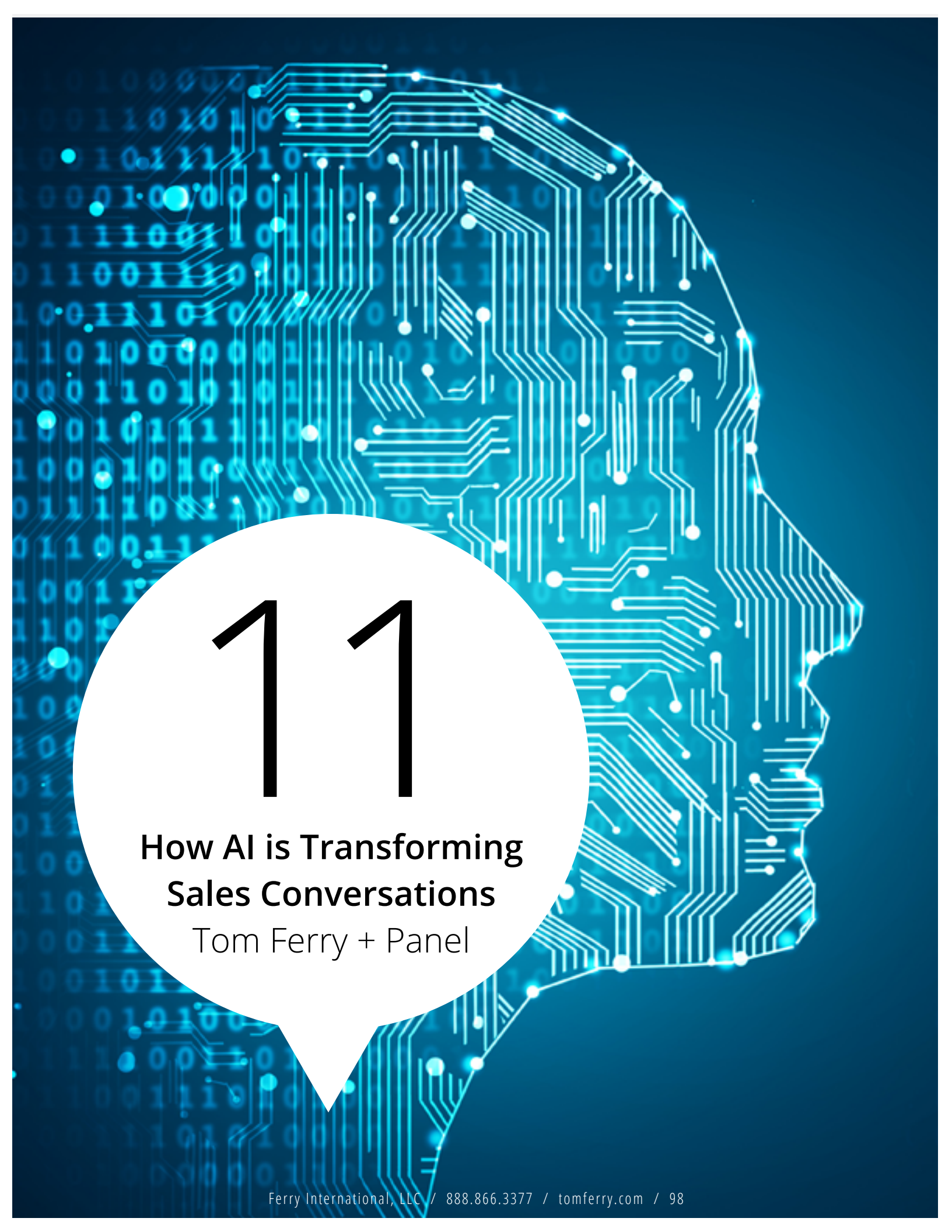
What am I committed to?

What new resources/people are required?

What new routine/discipline?

What happens if I don't execute?

What happens when I do?




# 11

## How AI is Transforming Sales Conversations

Tom Ferry + Panel



## How AI is Transforming Sales Conversations

A person in a dark suit and blue patterned tie is sitting at a desk, writing on a document with a black and gold pen. In the foreground, a small white model of a house with a red roof sits on a piece of paper. The background is blurred, showing a red object and a grey wall.

# 12

**Live Listing Presentation  
Battle Royale**



Live Listing Presentation Battle Royale



Live Listing Presentation Battle Royale



Live Listing Presentation Battle Royale



# Actions

What am I committed to?

What new resources/people are required?

What new routine/discipline?

What happens if I don't execute?

What happens when I do?





Live Listing Presentation Battle Royale / Top 10 Actions

Top 10 Actions	By Who?	By When?	Expectation of \$/ROI
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			



# 13

**Reclaim Your Schedule...  
and Rejuvenate Your Life!**



Reclaim Your Schedule... and Rejuvenate Your Life!



Reclaim Your Schedule... and Rejuvenate Your Life!



# Actions

What am I committed to?

What new resources/people are required?

What new routine/discipline?

What happens if I don't execute?

What happens when I do?

A man with glasses, wearing a dark suit jacket and light-colored trousers, is walking on a stage. He is holding a microphone in his right hand and a stack of papers in his left. The background is a dimly lit audience in a large hall.

14

The Lead Generation  
Playbook – **REFERRALS**

Jeff Mays



## The Lead Generation Playbook – REFERRALS



The Lead Generation Playbook – REFERRALS





## The Lead Generation Playbook – REFERRALS



The Lead Generation Playbook – REFERRALS



# Actions

What am I committed to?

What new resources/people are required?

What new routine/discipline?

What happens if I don't execute?

What happens when I do?



# CMA-A-Day

## Keep It Simple and Raise a Question

### A Case Study with Alexandra Rojas



Years in Real Estate: **7**  
 2021 GCI: **\$537,037**  
 2021 Transactions: **33**  
 2021 Volume: **\$17,341,043**

### By the Numbers

#### Alexandra's Database

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

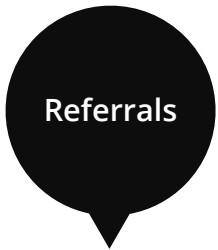


**The Roca Group at Douglas Elliman**  
**Real Estate**  
**Miami, FL**  
**alexandra@therocagroup.com**  
**IG: @alexandra.therocagroup**

### WHY CMA-A-DAY

Everyone wants to know the value of their home. Everyone who paid more than asking wants to know if they made a good decision. A current CMA opens the door to a much bigger conversation.

Click the button to see all of our Lead Generation Playbooks online



## 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.

### Content

- Don't rely on the MLS exclusively for conducting valuations. Use RVMs (Realtors Valuation Models®). RVMs automatically generate values which factor in criteria that may not be listed on the MLS, such as off-market properties. You'll end up with two values on your CMA. That makes people curious, which leads to a conversation – the whole point of sending the email.
- Send out two CMAs each day to people in your database.
- Customize each CMA to the specific recipient, from the subject line on. That's not to say you can't use a basic template.

But automatically generated content is impersonal – and people pick up on it. Producing two CMA emails takes 30 minutes a day.

- 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.
- Expect referrals.

### Process

- 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.
- Make sure the CMA is part of a much broader database contacting plan. Alexandra touches base with her database about six times a year, paying special attention to birthdays and holidays – and sending a crumble cake or two.



# 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

### Comparables:

ML#	Status	Area	Street Number	Compass Point	Street Name	#Beds	Baths Total	#Garage Spaces	Year Built	Sq Ft Total	List Price	Sale Price	CurrentPrice/SqFt
A11111310	Closed	50	8910	SW	159th Ter	4	3	2	1989	2373	\$699,900.00	\$645,000.00	271.81
A11132954	Closed	50	8921	SW	160th St	2	2	1	1987	2223	\$595,000.00	\$615,000.00	383.66
A11071691	Closed	50	15910	SW	90th Ave	4	2	1	1973	2215	\$579,000.00	\$588,000.00	302.62

### RVM Market Value:

RVM® estimated values are generated by an automated valuation model that uses on-market and off-market MLS listing data, plus publicly recorded sold data, to provide an estimated property value. An RVM® is our most accurate estimated value.

### Off Market / Public Record • Sold Date:

10/22/2020, Public Record  
RVM®  
REFINED VALUE  
CMA VALUE

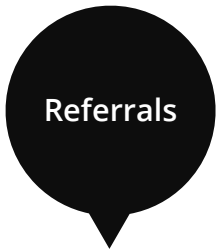
**\$646,600**

### 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?



## 6 THINGS ALEXANDRA WILL DO GOING FORWARD

1. Ask for video reviews from anyone who purchased a house with me in 2020 and saw 10% – 20% increase in their equity. (People love a good success story!)
2. Create a survey and send to my database with three simple questions:
  - a. Did you purchase a house in the past 5 years? If answer is yes, they receive a CMA.
  - b. Did you sell a house in the past 5 years? If answer is yes, I find out if they also purchased or are looking to buy.
  - c. Have you received a CMA in the last 12 months? If answer is no, I create a CMA and follow up.
3. Hand deliver a CMA booklet (currently working on creating one) to everyone who did not answer the CMA email or text.
4. After each meeting that resulted from a CMA, client gets a \$10 Starbucks gift card with a handwritten note:
  - a. "Success is best when it's shared.

Thank you for allowing me to be part of your journey and helping you build generational wealth. If you know anyone who can benefit from my services, I would be delighted to connect with them. Cheers, Alexandra Rojas"

5. Dig into my tenant database and provide a free valuation for the property they are renting, so they can compare how much is costing them to rent versus buying.
6. Work with my Tom Ferry coach to help keep me accountable and to help me implement these ideas!

## 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.

## ALEXANDRA ON COACHING

"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."



# Database

## First Rate Return on Relationships

### A Case Study with Matt Farnham



#### Team Farnham

Henderson, NV

team@teamfarnham.com

IG: @mattfarnham

Years in Real Estate: **18**

2021 GCI: **\$1.6**

2021 Transactions: **122**

2021 Volume: **\$60M**

#### By the Numbers

##### Matt's Database

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**

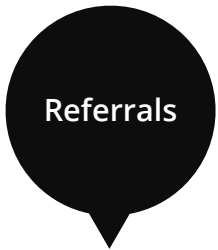
Return on Investment for database and referrals: **12X**

#### Referrals

### WHY DATABASE

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.





## MATT'S APPROACH

### Philosophy

Faith, family and friends. In that order. No rush, just healthy relationships with everyone he knows and meets. A rock solid real estate advisor living up to his professional reputation. An agent others promote without his ever asking for a referral.

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.

### Team Structure

Matt builds his business around relationships, so it's not surprising how he's built his team. The goal is a seamless customer journey.

- A Client Care Manager
  - Team coordinator
  - Assistant to Matt
  - Event planning
  - The one who makes sure every gift, surprise and touchpoint is planned and delivered, essentially "making the magic happen"
- A Client Relationship Manager
  - The one who levels up communication with current clients, past clients and new opportunities

- Primary team contact for nurturing new relationships down the funnel
- Collector of information on personal interests, hobbies, likes, dislikes
  - everything that makes a CRM a database of unique individuals
- A Transaction Manager
  - Responsible for everything contract to close
  - Obtaining 5-star client reviews
  - Executes high touch point escrow follow-up plan (client experience starts with how they communicate and guide the client through their transaction)
- A Marketing Manager
  - Execute team marketing plan
  - Mailers for farming, social media, newsletter, etc.
  - Mobilizing and equipping team agents for success

### Expertise

For those Matt already knows, his expertise is proven. For those he meets for the first time, his reputation precedes him. What are some of the practices he follows to be the respected knowledge broker in his area?

- Stay abreast of real estate news, Keeping Current Matters, and micro- and macroeconomic factors impacting the real estate market.
- Know your hot sheets. Understand what's

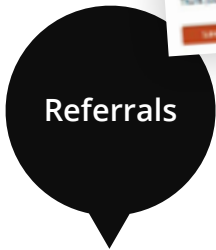


happening on a national level, but even more importantly at a hyperlocal level.

- 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.

### Areas To Improve

- Matt's team delivers best in class experience and results for their clients. However, Matt realizes he needs to do a much better job telling the world about the quality of his service. After a recent transaction, an influential client gave him some constructive criticism: "Matt, I knew you guys were good at what you do, but truthfully, the experience you deliver is far beyond what you let on. You need to do a better job of telling people the value you bring."
- Matt wants to make storytelling a bigger part of the process, both in-person and online. He says "we do so many things to wow our clients and get them amazing results, but a terrible job of capturing and repurposing those stories and that content." As Gary Vee says, "Agents need to be less concerned about creating new content as just documenting what they already do."
- Matt also reflects on how he can better leverage the work his team is already doing. "There is still meat left on the bone. Open Houses, circle prospecting and promoting the home run outcomes for our clients. We need to do a much better job milking all the opportunity out of each listing we take and the buyers we help."

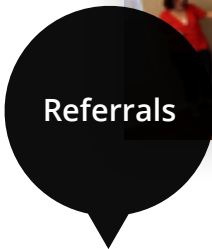
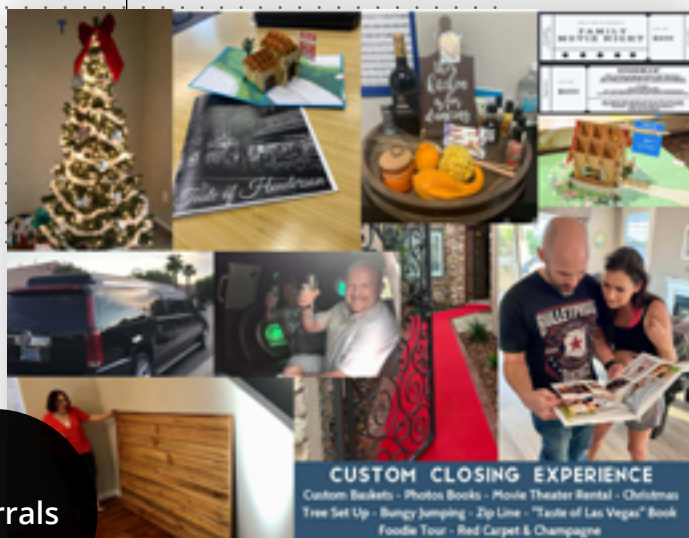


Click the button to see all of our Lead Generation Playbooks online



## 6 THINGS MATT WILL DO GOING FORWARD

1. Tom says, "Don't save the good stuff for the kitchen table. Tell them up front." We actually do worse than that. We don't even share it at the consultation as well as we should. We wait until the actual transaction. We need to be a little less humble and more bold up front about the experience we deliver.
2. Capture and repurpose the activity and moments we celebrate with clients. Show the world what we do for those who work with us.
3. 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!
4. We need to move to a weekly newsletter and more frequent email communication than we are currently doing.
5. Start getting video testimonials. We have great reviews but need to capture more on video for our website, Google Business Profile and social media.
6. Work with my Tom Ferry coach to help me implement and hold me accountable!






## 3 THINGS YOU CAN DO NOW

1. Personalize your client care. Turn your CRM into an inventory of individuals who can each be touched in a unique way. Start somewhere. It doesn't have to be hundreds of clients. Maybe you start with your best ten who trust you and refer business to you.
2. Consider hiring a full-time client care team to help you maintain existing relationships and develop new ones. Maybe your next

marketing dollar should be spent not on a lead source or channel, but on a person who can take client experience to a whole new level. Love on the people who already love you.

3. Become known as the knowledge broker. Learn to communicate what you learn. Always be sharpening the axe. A gifting and client experience strategy is worthless if your database doesn't also believe you're the best real estate agent they know.



Referrals

## MATT ON COACHING

“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.”

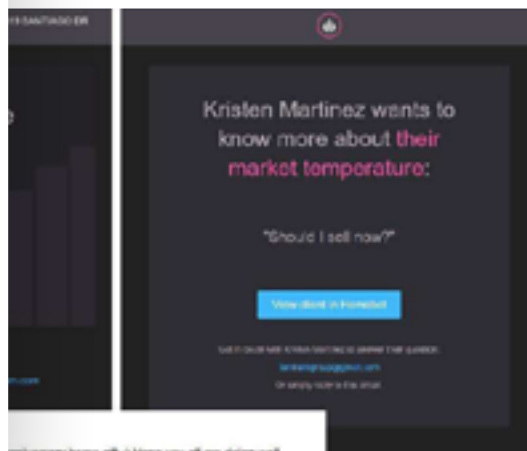


### HEY THERE! WE'RE THE HUB: LAS VEGAS!



### 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.



inventory home (t Hope you all are doing well for monthly email, its nice to see our property value go up. we!

Warm regards,  
Jamie & Jenise

### 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!



Referrals

Click the button to see all of our Lead Generation Playbooks online

A man in a grey suit and white shirt is speaking on a stage. He is wearing a lapel microphone and has his right hand in his pocket. The background is a blue wall with a repeating pattern of the name 'Phil Jones'.

# 15

Exactly What to Say

Phil Jones



Exactly What to Say



## Exactly What to Say





## Exactly What to Say



## Exactly What to Say



# Actions

What am I committed to?

What new resources/people are required?

What new routine/discipline?

What happens if I don't execute?

What happens when I do?

# 16

## Mega Agent Scripts Tom Ferry + Panel



Mega Agent Scripts



## Mega Agent Scripts



## Mega Agent Scripts



Mega Agent Scripts





# Actions


What am I committed to?

What new resources/people are required?

What new routine/discipline?

What happens if I don't execute?

What happens when I do?



17

**Leadership Becomes You:**  
Becoming the Hero Your  
Market Needs



**Leadership Becomes You: Becoming the Hero Your Market Needs**



**Leadership Becomes You: Becoming the Hero Your Market Needs**



# Actions


What am I committed to?

What new resources/people are required?

What new routine/discipline?

What happens if I don't execute?

What happens when I do?



# 18

**What Now:**  
Your 2022/2023  
Action Plan



What Now: Your 2022/2023 Action Plan



What Now: Your 2022/2023 Action Plan





What Now: Your 2022/2023 Action Plan



What Now: Your 2022/2023 Action Plan



## What Now: Your 2022/2023 Action Plan



# Actions

What am I committed to?

What new resources/people are required?

What new routine/discipline?


What happens if I don't execute?

What happens when I do?



What Now: Your 2022/2023 Action Plan / Top 10 Actions

Top 10 Actions	By Who?	By When?	Expectation of \$/ROI
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			



**Lead  
Generation  
Playbooks**



# Lead Generation Playbooks



Click the button to see all of our Lead Generation Playbooks online

Considering a new lead source? Wanting to improve one you're already working? 15 Rockstar agents share their success stories to give you insights and the inside scoop. Dive into their numbers, their strategies and their processes. Check out their examples. Whether their playbooks serve as benchmarks or opportunities to R&D or simply inspire you to action, you'll definitely want to dive in. The complete playbook can be found online. Just scan the QR code to find out what plays are working!

## Non-Owner Occupied: Helping the Small Investor



Avi  
**BECKER**

**The Santa Barbara Group**  
**Santa Barbara, CA**  
**IG @avi\_becker**

If you're not working with small investors, you're missing a big slice of the market. Avi shares where to find them, who to work with, and what to say when establishing relationships.

## Expireds: Relentless Prospecting Pays



Tim  
**DOMINICK**

**Samson Properties**  
**Baltimore, MD**  
**IG @dominickhomes**

Looking for a way to build your database? Tim shares his dialed-in approach for targeting expireds – with some solid practices to stay focused and on task.



## Geo Farming:

Being at the Center of Your Community



### Shelley **SAKALA**

**The Sakala Group**  
**Phoenix, AZ**  
**IG @homesbythesakalagroup**

What does Shelley do that leads her to dominating 60% of her geo farm? How does she manage her marketing dollars to get the community talking about her? Shelley shares her strategies and ideas.

## Direct Mail:

Doubling Down on Old School



### John **COLLINS**

**RE/MAX Main Line**  
**Paoli, PA**  
**IG @remaxmainline**

Direct mail is about as basic as it gets. But you may want to learn how John Collins doubles his marketing dollar by working two interlinked farms.



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## Database: 110% Community Focused



### Alan & Betsy **THOMPSON**

**Lucky Homes**  
**Chesapeake, VA**  
**FB @LuckyHomesRealtors**

Alan and Betsy only work by referral, but giving referrals doesn't come naturally to everyone. Sometimes it takes a little coaching from the agent to turn clients into brand ambassadors.





Click the button to see all of our Lead Generation Playbooks online

### Google Business Profile:

Easy to Find, Quick to Answer



Ashley **PEDERSON**

Promo Realty  
Jefferson City, MO  
IG @ashleypedersonsteam

When you optimize your Google Business Profile the way Ashley does, people find you – and connect. Because ranking first online never hurts your image!

### Annual Equity Review:

Providing Value, Earning Trust



John **ELY**

Phoenix, AZ  
john@relyrealestateco.com  
FB @RelyRealEstateCo

How do you transition smoothly from talking numbers to receiving referrals? John shares how he sets himself apart as the knowledge broker people turn to for answers.

### Agent-to-Agent Referral:

Share Your Best Ideas



Kari **CROSS**

The Cross Group  
Discovery Bay, CA  
IG @thecrossgroup

If you wanted to target agents for your brokerage, agents for referrals, your VIP clients, and everyone else in your database by email, how would you approach it? Kari's strategy is worth a look.

### Weekly Email:

From Open Rate to Closed Deals



Jesse **EBNER**

Signature Properties | Ebner and Associates  
Crested Butte, CO  
IG @jesseebner

Looking for a consistent email format that generates consistent engagement – and transactions? See what Jesse has done with email over three years as her closings tripled.

A close-up photograph of a person wearing a yellow long-sleeved shirt. The person's right hand is holding a silver pen, and their left hand is holding a black calculator. The calculator has a numeric keypad with buttons for '+', 'x', '%', 'M+', 'AC', 'ON', '00', '0-9', 'MC', 'MR', 'M-', 'MU', 'OFF', and '+/-'. A white speech bubble with a tail pointing towards the bottom right is overlaid on the image, containing the text 'Business Planning' in a bold, black, sans-serif font.

# Business Planning



# 2022 - 2025 Plans: Moving from Uncertainty to Certainty

## 2022

Team size:

Units:

Volume:

GCI:

Profits:

## 2023

Team size:

Units:

Volume:

GCI:

Profits:

## 2024

Team size:

Units:

Volume:

GCI:

Profits:

## 2025

Team size:

Units:

Volume:

GCI:

Profits:

## Totals from 2022 to 2025

Units = \_\_\_\_\_

GCI = \_\_\_\_\_

Volume = \_\_\_\_\_

Profits = \_\_\_\_\_



# Business Plan

## Foundations

### Commitment

---

Interested? Committed? Obsessed? You're about to lay out your plan for 2023, your bridge to your future. But a plan without the will to execute is only words on a page. So, write a message to yourself and your coach stating how seriously you are committed to implementing this plan and being held accountable to it.

### Accountability

---

What additional accountability do you need to ensure your success? Let your coach know.

### "Why"

---

What motivates you? A powerful Why comes out of a clear understanding of self. Do not write what should motivate you. Acknowledge the truth about what drives you.





# Business Plan

## Operations Initiatives

The more productive you are, the more money you make. The more organized you are, the more you can keep your focus. Operations is about streamlining your business and improving efficiencies. Reflect on your business with your coach. What areas can you work on that will have the greatest impact?

What I will do	Priority (Score 1-5) with 5 being most important
<ul style="list-style-type: none"> <li>• Hire an assistant before Q4.</li> <li>• Standardize/formalize my transaction process.</li> <li>• Determine ROIs on lead sources.</li> <li>• Purchase a more robust accounting software – and use it!</li> <li>• Enter my numbers into illūm at the end of each day.</li> <li>• Streamline my open house system (find a sign-in app).</li> </ul>	<p style="text-align: center;">4</p> <p style="text-align: center;">5</p> <p style="text-align: center;">3</p> <p style="text-align: center;">5</p> <p style="text-align: center;">4</p> <p style="text-align: center;">3</p>

What I will do / Where I need accountability	Priority (Score 1-5) with 5 being most important
<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>	



# Business Plan

## What's My Daily Number?

The next step is determining how many conversations will be needed to generate your needed number of appointments.

If you know your numbers, use your average here.

If you don't know your numbers, I estimate that most agents close one transaction from every 40 business-focused conversations conducted with a new lead or a database contact.

Multiply your transaction goal by 40 to determine how many conversations you need to conduct.

Then, divide that number by the number of weeks you plan to work in 2023.

This will give you your Weekly Conversation Goal, which you can then break down even further into your Daily Conversation Goal.

While analyzing these numbers, be sure to note where your transactions are coming from and where you can seek out new growth opportunities.

My Daily Number is:

---



# Business Plan

## Optimal Day

What does my perfect day look like to carry out this plan?

Time	Activity Description
4AM	
5AM	
6AM	
7AM	
8AM	
9AM	
10AM	
11AM	
12PM	
1PM	
2PM	
3PM	
4PM	
5PM	
6PM	





# Business Plan

## Optimal Week

What does my perfect week look like to carry out this plan?

Time	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
4 - 6 AM							
6 - 8 AM							
8 - 10 AM							
10 AM - 12 PM							
12 - 2 PM							
2 - 4 PM							
4 - 6 PM							
6 - 8 PM							
8 - 10 PM							



<b>SEP</b>	<b>OCT</b>	<b>NOV</b>
<b>JAN</b>	<b>FEB</b>	<b>MAR</b>
<b>JUL</b>	<b>AUG</b>	<b>SEP</b>



**DEC**

**APR**

**MAY**

**JUN**

**OCT**

**NOV**

**DEC**



# I'M ALL IN!

SPEAK TO A CONSULTANT AT THE COACHING BOOTH  
Call **800-624-9575** or visit [TomFerry.com/Join](https://TomFerry.com/Join)

## Specialized Support

Access to specialized, skill-based support teams to provide support tailored to you and your business.

## Private Mastermind Groups

Access to member-only Facebook groups, where thousands share success secrets, inspire & support one another.

## Special Event Pricing

Free or discounted admission to all Tom Ferry events, including Success Summit.

## Group Training Sessions

Dynamic sessions packed with knowledge and actionable tips from the best of the best in the real estate industry.

## Exclusive Member-Only Events

Exclusive retreats to propel your business forward via invaluable networking and private time directly with Tom Ferry.

## Training Resources

Learn a simple-to-follow game plan to boost your business with Tom Ferry's online real estate training courses and resources.

## Tom Ferry OnDemand

Get instant web access to some of our most popular digital products and livecast events.

## illūm

Hundreds of resources all in one place. Includes financial planning, goal tracking and interactive business planning.





If you tell your  
story right,  
**people will want  
to be part of it.**

A handwritten signature in black ink, appearing to read 'Tom J', located at the bottom center of the page.



# Your Coach, Your Story

Our coaches are focused on making your business repeatable and scalable so you can fulfill your greatness.

Write your success story even faster with a coach who is equipped with a proven track record in the business.



I've been getting coached for 18 months now, and in my first year of coaching, my GCI went up by 90%. It's the best investment I could ever make because it made me a better leader and business owner. It's the greatest thing that I could have done, and there's no chance that I would consider stopping because I would simply make less money without Tom Ferry coaching.

- Juan Huizar



I was doing well on my own, but I had bigger goals and dreams. I signed up for coaching because I wanted to break into the luxury market. With the help of my Tom Ferry coach, I not only broke through the luxury market, but doubled my GCI from last year.

- Lily Moore



I've been in real estate since 1990 and a luxury real estate broker in Beverly Hills for over 24 years. Tom Ferry is one of the smartest men I know. For me there is NO ONE in the real estate coaching industry that can provide the most current and effective methods to market yourself and sell real estate in today's world. The one big thing that I've accomplished through coaching with Tom Ferry is maintaining an amazing quality of life.

**- Christophe Choo**



I became an agent in April 2020 and was just a baby agent, new to the whole industry. I didn't know where to start so I decided to sign up for coaching with Tom Ferry. My coach really connected with me, got me organized, and I know my coach cares about me. He believes in me, supports me, and sees things in me that I wouldn't have otherwise seen. And I closed 12 transactions in the first 5 months of the year! I know coaching helped me get there faster.

**- Carolyn Boss**



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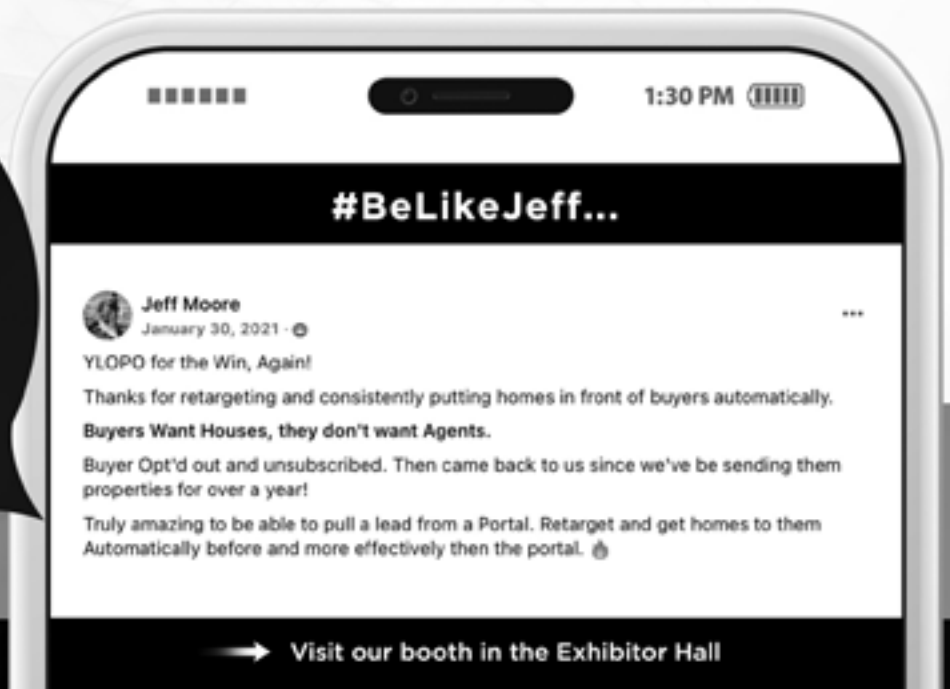
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- Jason Pantana



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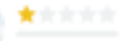
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A hand holding a silver and black pen is positioned over a spiral-bound notebook. The notebook is open, and the pen is held in a writing position. A white speech bubble with a black outline is centered over the notebook, containing the word "Notes" in a black, sans-serif font. The background is a blurred, textured surface, possibly a desk or a wall.

# Notes



Notes



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