



*Skills to Spark a Great Career*

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Version 6.0 | April 2022

**Participant Guide**



# Notices

## General

While Keller Williams Realty, Inc. (KWRI) has carefully prepared all course materials, we do not guarantee their accuracy or make any express or implied warranties about the information. KWRI may change the material at any time without notice.

This course may contain hypothetical examples and exercises meant to illustrate aspects of Keller Williams' financial, growth and investment models, including:

- calculation of profit share contributions and distributions;
- calculation of agent compensation;
- evaluation of a Market Center's financial results;
- agent productivity strategies; and
- estimates of return on investment.

These materials and examples are provided for informational purposes only; they are not a guarantee or prediction of performance, sales, or profits. Agent productivity strategies are models only, not requirements. Independent contractors should set their own goals and strategies. You should not (1) assume that the results of these exercises and models predict your or a Keller Williams Market Center's financial performance, or (2) consider or rely on the results of the exercises and models in deciding whether to make any investment. You should consult your own legal or financial advisor and verify all information to your satisfaction.

## Telemarketing

WARNING! You must comply with the TCPA and any other federal, state or local laws, including for B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance.

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## WARNING!

### Do Not Call / Telephone Consumer Protection Act

The Telephone Consumer Protection Act (TCPA) regulates calls and texts to cell phones and landlines, auto-dialed calls, prerecorded calls, faxes, and calls to numbers on the Do Not Call (DNC) Registry. Class-action litigation for TCPA violations is increasing, potentially exposing agents, Market Centers and KWRI to catastrophic financial damages. Consult an attorney for guidance on the TCPA and DNC laws, including consent requirements, autodialer restrictions and prerecorded messages.

#### TCPA

##### ⚠️ Auto Dialers

The TCPA regulates calls and texts to a cellphone using an automatic telephone dialing system (autodialer).

##### ⚠️ Prior Express Written Consent/ Written Consent

In certain cases, a caller must have prior express consent before making a call. In other cases, prior express *written* consent is required, including for certain texts.

##### ⚠️ Artificial Voice / Prerecorded Message

Never use artificial voice or prerecorded messages without a consumer's prior express written consent. Penalties can cost up to \$1,500 per violation.

##### ⚠️ Federal and State Laws

Several states have their own laws governing telemarketing. Talk with your broker about any local and Market Center rules and DNC lists.

#### DO NOT CALL DO'S AND DON'TS

Under federal law, sellers and telemarketers may not call individuals listed on the Federal Trade Commission's Do Not Call (DNC) Registry. Failure to comply with DNC laws could result in substantial government fines and/or civil legal actions. Consult an attorney regarding compliance with DNC laws.

##### ✓ Subscribe to the Registry

The DNC Registry is hosted on a dedicated website. Your Market Center should subscribe to the Registry and give you login credentials. Making any telemarketing calls without access to the Registry violates federal law.

##### ✓ Honor Do Not Call Requests

Never call a number on the Do Not Call Registry. Honor an individual's request to be added to your internal DNC list.

##### ✓ Check Before You Call

Before making a call, check to see if the number is on any of these lists: 1) National Do Not Call Registry; 2) state Do Not Call list; and 3) Market Center and agent list. If the number is on any of these lists, delete it.

##### ✓ Limited Exceptions

Penalties for a DNC violation total up to \$43,280 per call. Fines for violating a state DNC rule can vary from \$100 to \$25,000.

For more information, visit <http://www.kwconnect.com/page/industry-resource/dnc>

# OUR MVVBP

## OUR MISSION

To build **CAREERS** worth having,  
**BUSINESSES** worth owning,  
**LIVES** worth living,  
**EXPERIENCES** worth giving, and  
**LEGACIES** worth leaving.

## OUR VALUES

**GOD, FAMILY**, then business.

Real estate is a local service business driven by individual **REAL ESTATE AGENTS AND THEIR LOCAL IMAGE** with their centers of influence and client base.

Our associates should be treated like **“STAKEHOLDERS.”**

**PROFIT** matters.

Stakeholder companies always **MEASURE** profit or loss, **OPEN** the books, and **TELL** the truth.

Who you are **IN BUSINESS WITH** really does matter.

No transaction is worth **OUR REPUTATION.**

## OUR VISION

To be the real estate  
**COMPANY OF CHOICE**  
for agents and their customers.

## OUR BELIEF SYSTEM

**WIN-WIN** or no deal

**INTEGRITY** do the right thing

**CUSTOMERS** always come first

**COMMITMENT** in all things

**COMMUNICATION** seek first to understand

**CREATIVITY** ideas before results

**TEAMWORK** together everyone achieves more

**TRUST** starts with honesty

**EQUITY** opportunities for all

**SUCCESS** results through people

## OUR PERSPECTIVE

**A TECHNOLOGY COMPANY THAT PROVIDES THE REAL ESTATE PLATFORM THAT OUR AGENTS' BUYERS AND SELLERS PREFER.**

Keller Williams thinks like a top producer, acts like a trainer-consultant, and focuses all its activities on service, productivity, and profitability.



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# Real Estate Expert

## **SESSION 1**

# Spark Your Career



# Today's Agenda

  
**Real Estate  
Expert**



  
**Lead  
Generation**



  
**Lead  
Follow-up**



  
**Transaction**

Notes:

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# The Six Personal Perspectives

## SIX PERSONAL PERSPECTIVES

- 1 Commit to "Self-Mastery"
- 2 Commit to the 80/20 Principle
- 3 Move from "E" to "P"
- 4 Make Being "Learning-Based" the Foundation of Your Action Plan
- 5 Remove Your "Limiting Beliefs"
- 6 Be Accountable

 Anyone can do it ... not everyone will ... will you?  
**Gary Keller**  
*The Millionaire Real Estate Investor*

Notes:

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# 1. Commit to Self-Mastery

1. Know your goals
2. Know your strengths and weaknesses
3. Know how to work with both your strengths and weaknesses to seek and master the necessary knowledge, skills, and habits to reach your goals

Notes:

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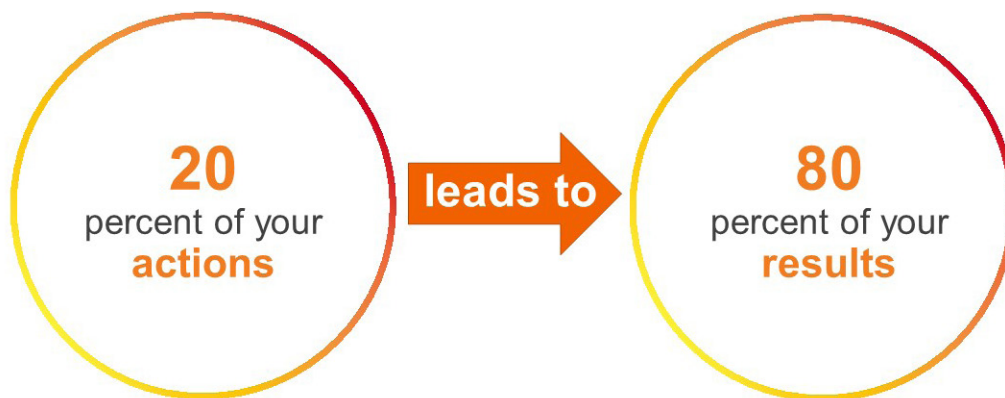
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# 2. Commit to the 80/20 Principle



Notes:

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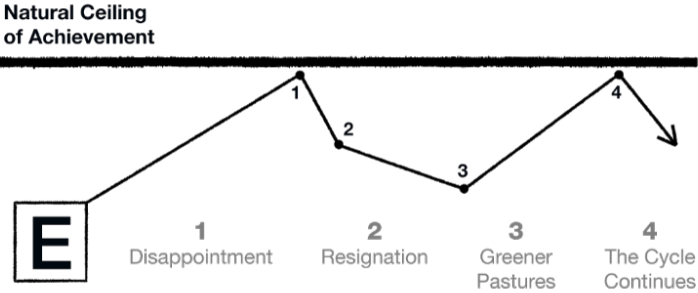
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# 3. Move from E to P

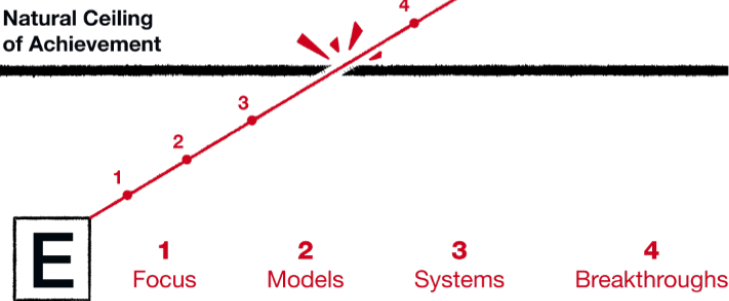
## The Entrepreneurial Approach

Doing what comes naturally



## The Purposeful Approach

Doing what comes unnaturally



Notes:

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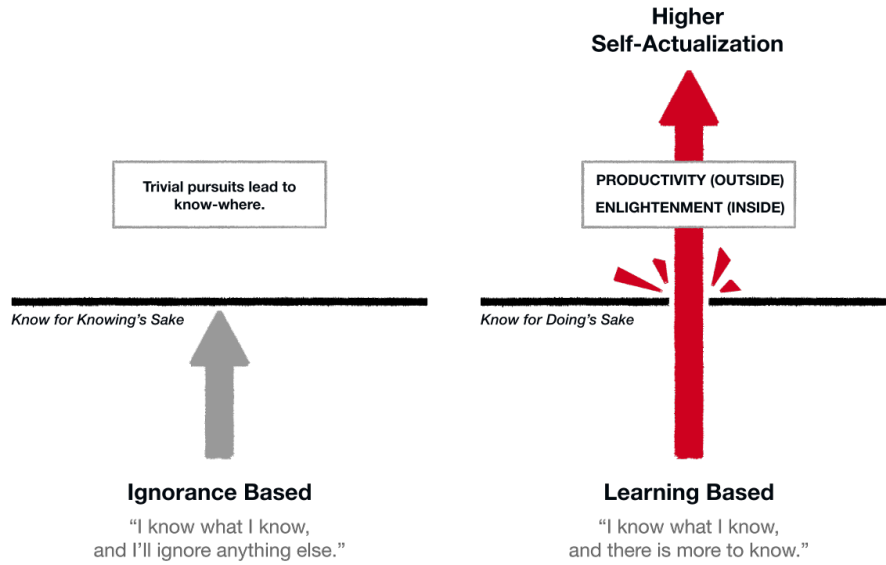


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# 4. Make Being Learning-Based the Foundation of Your Action Plan



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 I am neither especially clever nor especially gifted. I am only very, very curious.

Albert Einstein



# 5. Remove Your Limiting Beliefs



## UNLIMITING BELIEFS

When you unlimit your thinking, you unlimit your success!



## LIMITING BELIEFS

“I don’t have enough time for training.”

“I can’t be successful in this market.”

“I can’t devote three hours each day to lead generation.”

Notes:

Five horizontal lines for taking notes.

# Reframe Limiting Beliefs



Read the three limiting beliefs below. Add one or two of your own limiting beliefs. Then rewrite each sentence into a belief that is positive and will propel you into action.

1. I have to be an expert and know everything before I can begin my business; I'm not valid yet.

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2. I don't know how I can achieve a profit goal that will fund my life this year.

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3. I'm not comfortable talking with people about real estate.

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4. I can't devote time each day to lead generation.

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5. \_\_\_\_\_

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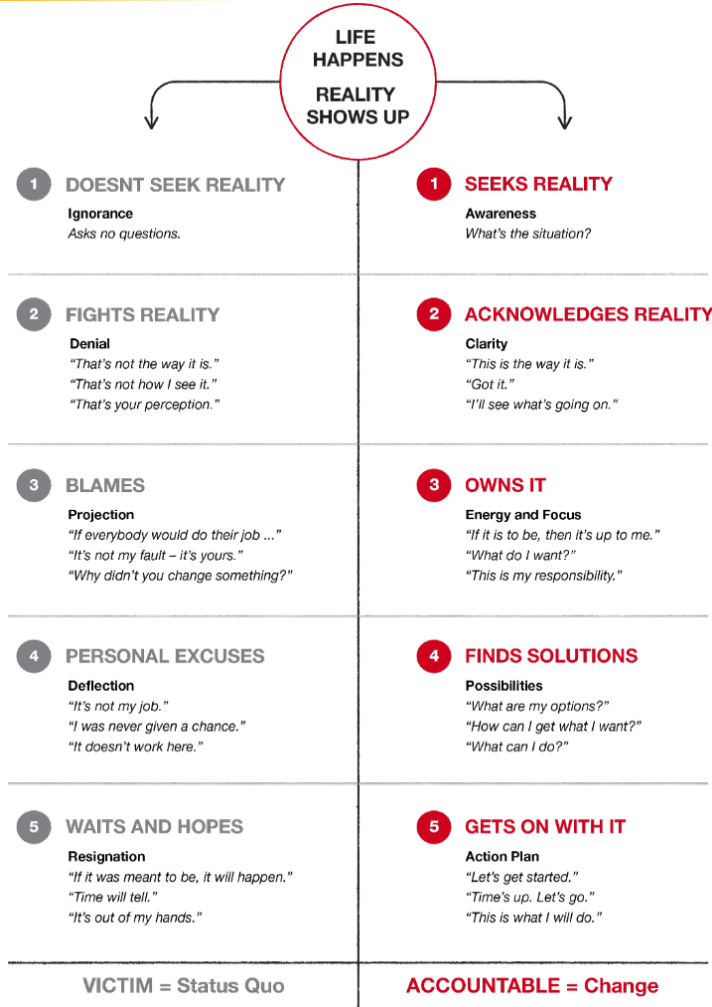
6. \_\_\_\_\_


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# 6. Be Accountable



 Happiness is not an individual sport.  
**Shawn Achor**  
*author, The Happiness Advantage*

Find videos for the Six Personal Perspectives on Connect Live.




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# KW Culture

## Mission and WI4C2TES (KW Belief System)

### OUR MISSION

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**EQUITY** opportunities for all

**SUCCESS** results through people

## Embody Beliefs



Learn more from these  
KW courses: The  
Color of Real Estate,  
Unconscious Bias, and  
Agent of Distinction

I will embody the following belief in this way:

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### Aha's

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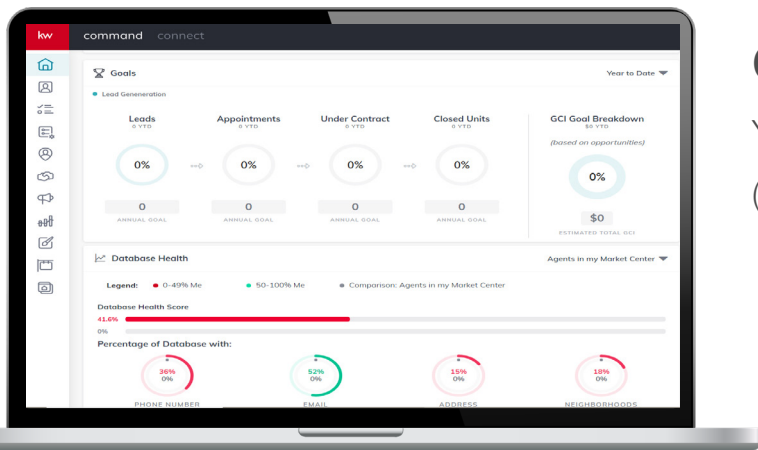
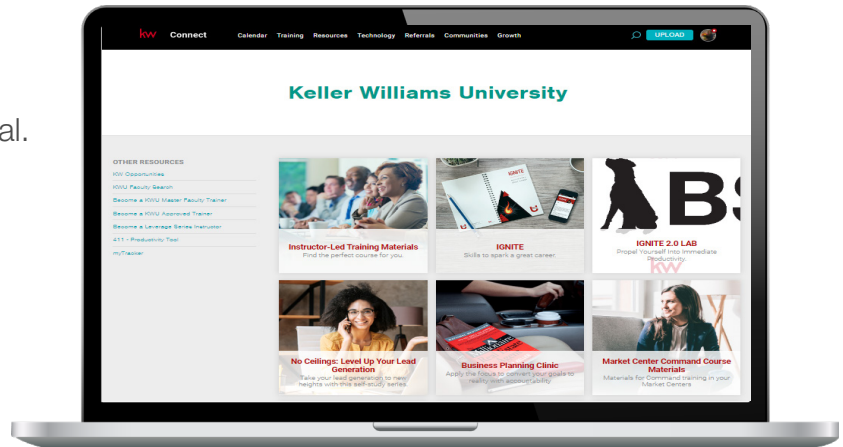


# KW Value

## Connect

Your information and learning portal.

([kwconnect.com](http://kwconnect.com))



## Command

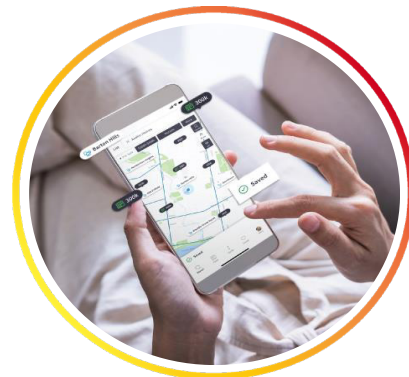
Your online business platform.

([agent.kw.com](http://agent.kw.com))

## Command App



## KW App





# Your Market Center Value

Language of Real Estate:

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Market Center Mission:

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Leadership Team and ALC:

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## Profit Share and Growth Share

Passive income with no:

- 1. Financial risk
- 2. Legal risk
- 3. Down payment
- 4. Phone calls



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# kwx Companies and Communities



KW Communities:

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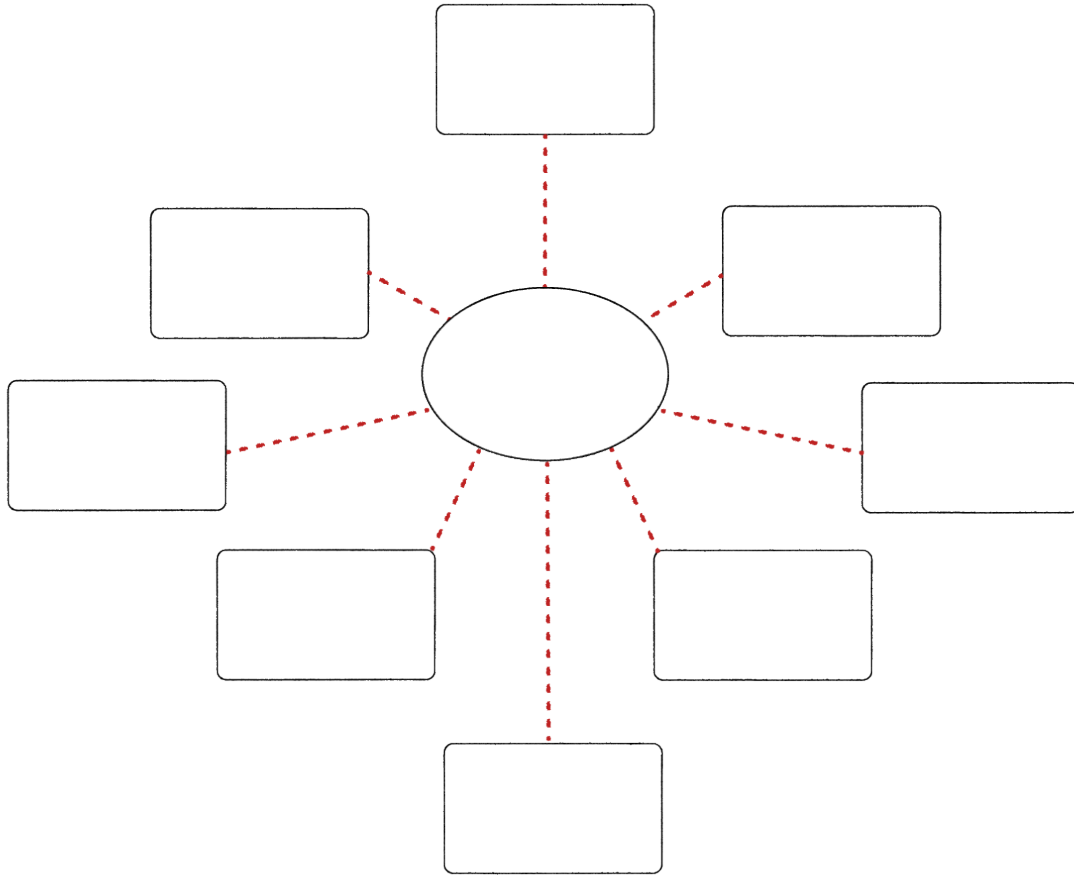
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Pursuant to RESPA, Keller Williams agents/associates must provide an ABA Disclosure to the consumer at or before any referral is made to Keller Mortgage. More information on RESPA and the ABA Disclosure can be found here or at: <http://www.kwconnect.com/page/industry-resource/>



# Your Big Life



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To achieve success, you need motivation and inspiration for doing it—your Big Why.

**Gary Keller**  
*The Millionaire Real Estate Agent*

## My Big Why

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# Your Vision - Your Income Goal



**A** is your annual net income goal – how much money you want to make this year before taxes and operating expenses.

**B** is the maximum amount you can expect to pay the Market Center.

**C** is your annual business expenses, this includes salaries, most lead generation and marketing expenses, education, etc.

<b>A</b>	<b>Net Income Goal</b>	
<b>B</b>	<b>Company Dollar and Royalty Cap</b>	
<b>C</b>	<b>Business Expenses</b>	
<b>D</b>	<b>Total Gross Commission Income (GCI)</b>	
<b>E</b>	<b>Your Average Commission</b>	
<b>F</b>	<b>Annual Transaction Goal</b>	

**D** is your Total GCI, which is the total of A, B and C added together. This is how much money you'll need to earn from transactions to pay the Market Center and still hit your net income goal.

**E** is an average GCI per transaction.

**F** is how many transactions you'll need to hit your goal, based on your average GCI. To get this number, divide D by E.




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# Powerful Conversation

- Lead generate
- Uncover motivations
- Identify objections
- Close deals
- Speak in terms the customer understands
- Build confidence

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Who do you know that is going through a life event that might lead to a move?

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Who does not yet know you are a real estate agent?

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Who have you not spoken to in the last two weeks?

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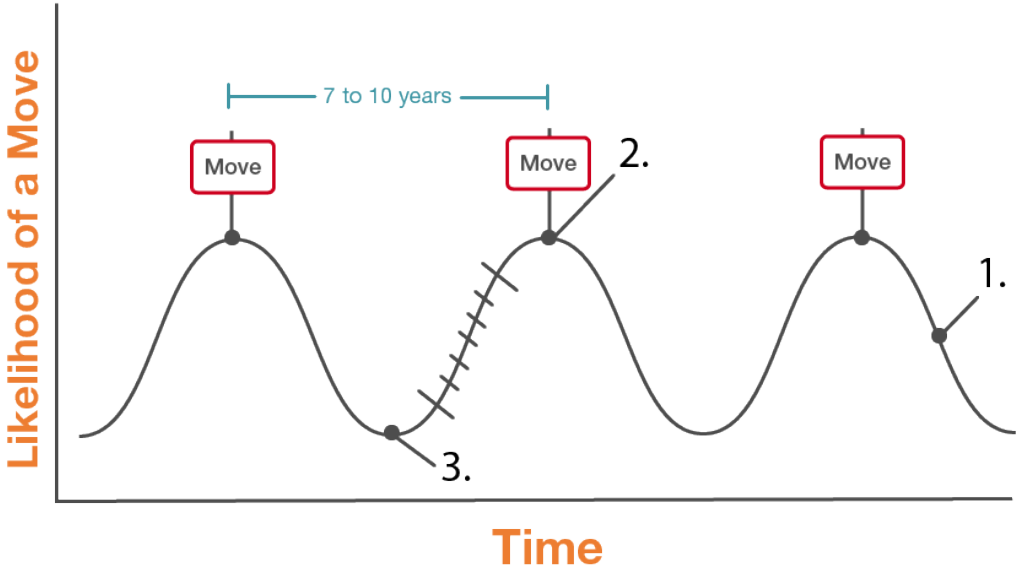
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# Catch Your Sphere on the Move



1. Who has recently moved?

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2. Who may be thinking of moving soon?

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3. Who is somewhere in the middle?

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# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?

How will your behaviors be different going forward? What **ACTIONS** will you take?

What **TOOLS**, models, or systems will you use? How will they make you accountable?



# Aha's

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# Real Estate Expert

## **SESSION 2**

# Embrace Your Job



# Today's Agenda

  
**Real Estate  
Expert**



  
**Lead  
Generation**



  
**Lead  
Follow-up**



  
**Transaction**

Notes:

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# The Six Core Competencies of a Business

**1** Lead generate, capture, and convert to appointments

**4** Write and negotiate contracts

**2** Present to buyers and sellers and get agreement

**5** Coordinate the sale to closing

**3** Show buyers and market sellers

**6** Manage the money

Notes:

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## 1. Lead generate, capture, and convert to appointments

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## 2. Present to buyers and sellers and get agreements

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## 3. Show buyers and market sellers

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### 4. Write and negotiate contracts

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### 5. Coordinate the sale to closing

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### 6. Manage the money

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# Fiduciary vs. Functionary

## The Difference Between a Functionary and a Fiduciary

Functionary	Fiduciary
Low Level	High Level
Low Relationship	High Relationship
Assumes Little Responsibility	Accepts High Responsibility
Uses Low Skill	Masters High Skill
Records Information	Perceives Information
Responds to Needs	Anticipates Needs
Processes Data	Interprets Data
Narrow Picture Viewpoint	Big Picture Viewpoint
Delivers Information	Advises and Consults
Other-Directed	Self-Directed
Minimum Legal Responsibility	Maximum Legal Responsibility
Employee	Partner
Does the Task	Owens the Result
Tells and Sells	Educates and Guides
Stays out of Decision Making	Involved in Decision-Making
Follows Rules and Procedures	Uses Judgment and Intuition
Replaceable	Irreplaceable
Minimally Paid	Highly Paid




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# Be the Fiduciary



## Examples of Being a Fiduciary

1. Lead generate, capture, and convert to appointments

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2. Present to buyers and sellers and get agreements

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3. Show buyers and market sellers

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4. Write and negotiate contracts

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5. Coordinate the sale to closing

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6. Manage the Money



# Accountability

## Accountability Guidelines

- Provide a safe place to share.
- Follow through with action items.
- Listen and pay attention while the other person shares.
- Set a frequency of checking in with each other.
- Dig deep to find out why you do the things you do.
- Respect each other and the process
- Create a commitment and stick to it.
- Be open to receiving feedback.
- Give specific feedback.
- Have each other's best interest in mind.



Accountable people achieve results others can only dream of.

**Gary Keller**  
*The ONE Thing*

Notes:

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# Choose an Accountability Partner



## Ignite Accountability Plan

Accountability Partner's Name:

Contact Information

Accountability Partner's Goals:

Frequency of Accountability Check-ins:

Date, Time, and Location of First Accountability Check-in:

Additional Notes:





# Success System Tracker



## DAILY SUCCESS SYSTEM

- \_\_\_ of 10 CONVERSATIONS
- \_\_\_ of 10 CONTACTS ADDED
- \_\_\_ of 10 HANDWRITTEN NOTES
- 10-5-1 SOCIAL MEDIA ENGAGEMENT
- ENRICHMENTS
- APPOINTMENTS
- AGREEMENTS
- CLOSINGS



If you can't measure it, you can't improve it.

**Peter Drucker**

*Austrian-American management consultant, educator, and author*

Notes:

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# Turn Aha's into Achievement

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# Daily Success System

## Success Activities

These are suggested activities for the second half of your session.



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# Real Estate Expert

## **SESSION 3**

# Connect With Your Market



# Today's Agenda

  
**Real Estate  
Expert**



  
**Lead  
Generation**



  
**Lead  
Follow-up**



  
**Transaction**

Notes:

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# The Three Types of Real Estate Markets

1. Buyers Market \_\_\_\_\_
2. Balanced Market \_\_\_\_\_
3. Sellers Market \_\_\_\_\_



Just because it has never been done in your market doesn't mean it is impossible to achieve.

**Gary Keller**

*The Millionaire Real Estate Agent*

Notes:

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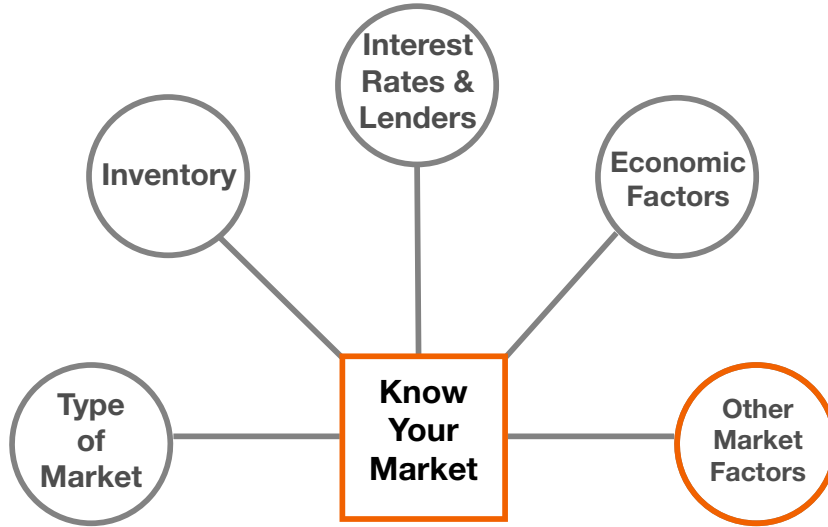
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# Know Your Market



Here's the truth: If it has been done in another market, it can be done in your market ...

**Gary Keller**

*The Millionaire Real Estate Agent*

Notes:

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# Identify the Characteristics of Your Market



1. What is the inventory of your market?

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2. What is the average number of days a home stays on the market?

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3. What is the average price a home in your market sells for?

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4. Based on the inventory what type of real estate market are you in?

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5. What are the current average mortgage interest rates?

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6. What is the employment/unemployment rate in your market?

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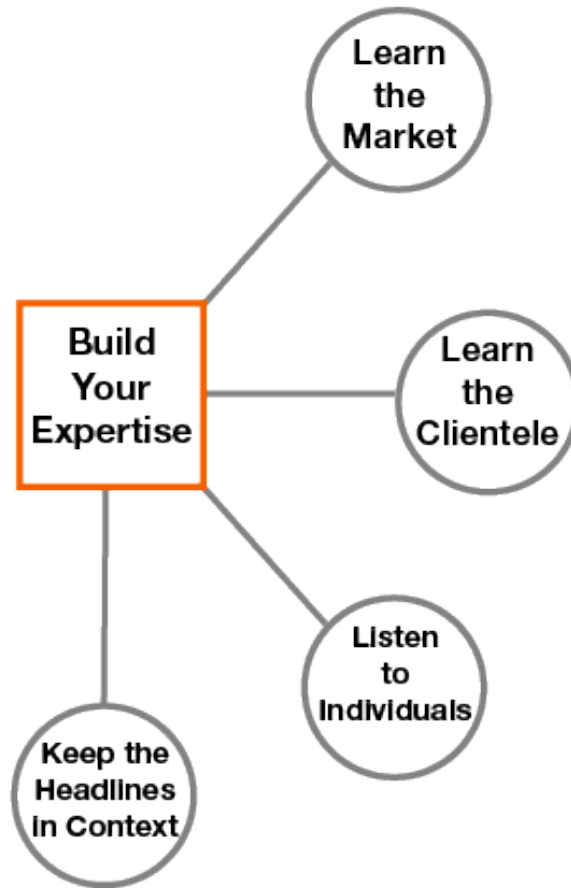
7. What is the growth rate of your community?

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# Build Your Expertise



Notes:

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# KW Apps



Find more information about the apps through Connect courses. Get started at [Go to answers.kw.com](https://answers.kw.com) and search “Ignite Reference Guide.”

1. Command App
2. KW App



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# 10-5-1 Social Media Engagement

10					
					
5					
1					

## Brainstorm Your Social Media Personality



Open one of your social media apps and make a list of the kinds of posts you've liked recently:

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How would you describe the brand or niche of the posts above?

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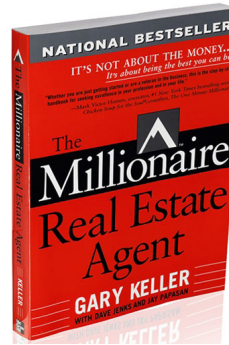
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# Enrichments

1. Study your Market Center Report
2. Preview homes
3. Take an MLS Course
4. Open Houses
5. Language of Real Estate
6. Read *The Millionaire Real Estate Agent*



Notes:

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You can't control the market but you can control your outlook and your response to the market.

Gary Keller  
*SHIFT*



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- ENRICHMENTS
- APPOINTMENTS
- AGREEMENTS
- CLOSINGS

10					
					
5					
1	 <b>Social Media Engagement</b>				

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# Real Estate Expert

## **SESSION 4**

# Define Your Value



# Today's Agenda

  
**Real Estate  
Expert**



  
**Lead  
Generation**



  
**Lead  
Follow-up**



  
**Transaction**

Notes:

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## Benefits of a Value Proposition

1. Helps your clients understand your value and expertise

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2. Protects your commission

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3. Builds strong and trusting relationships

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# The Purpose of Real Estate

## Buyers

To find just the right home, at the best price, in the right time, with the least number of problems.

## Sellers

To net the most amount of money, in the shortest amount of time, with the least number of problems.

### Prevent or Minimize Possible Challenges

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# Top 10 Service Areas of the Value Proposition

Services You Offer to Buyers	Services You Offer to Sellers
1. Needs Analysis	1. Needs Analysis
2. Prequalification or Pre-approval	2. Pricing Strategy
3. Neighborhood Information	3. Property Preparation
4. Home Search	4. Marketing Strategy
5. Make an Offer	5. Receive an Offer
6. Negotiating to Buy	6. Negotiating to Sell
7. Vendor Coordination	7. Sell
8. Preclose Preparation	8. Preclose Preparation
9. Closing	9. Closing
10. Post Closing	10. Post Closing











# Define Your Value Proposition

**Step 1:** Identify your knowledge, attitudes, skills, and beliefs that make you qualified to be a great real estate agent.

- List your knowledge, attitudes, skills, and beliefs in the *Your Attributes* column in the table below. An example has been provided for each category.
- After you have written your attributes, CIRCLE the ones that align with what buyers and sellers value from the NAR data on pages 4.6-4.7. STAR the attributes that show how you stand out as an agent.

Category	Your Attributes
<p><b>Your Knowledge</b></p>	<p><i>Example: Finance degree</i></p>
<p><b>Your Attitudes</b></p>	<p><i>Example: Committed</i></p>
<p><b>Your Skills</b></p>	<p><i>Example: Problem solving</i></p>
<p><b>Your Beliefs</b></p>	<p><i>Example: Integrity</i></p>



## Step 2: Transform the value you provide and the value of KW and your Market Center into benefits for your clients.

- Choose three attributes you circled or starred in Step 1 and rewrite them in terms of how they benefit your client. An example has been provided for you in the first row.

Your Knowledge, Attitudes, Skills, and Beliefs	Benefit to Your Client
<i>Example: Integrity</i>	<i>Honest, dedicated service and the assurance that you will keep the commitments you make</i>

- Choose three examples of value you receive from Keller Williams and your Market Center and rewrite them in terms of how they benefit your client. Refer to what you learned in Ignite Session 1 if needed. An example has been provided for you in the first row.

Keller Williams and Market Center Value	Benefit to Your Client
<i>Example: KW App</i>	<i>From appointment to close, the KW App's features provide opportunities to stay connected with your client throughout the entire transaction</i>





# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?

How will your behaviors be different going forward? What **ACTIONS** will you take?

What **TOOLS**, models, or systems will you use? How will they make you accountable?

# Daily Success System

















## Success Activities

These are suggested activities for the second half of your session.



### DAILY SUCCESS SYSTEM

- \_\_\_ of 10 CONVERSATIONS
- \_\_\_ of 10 CONTACTS ADDED
- \_\_\_ of 10 HANDWRITTEN NOTES
- 10-5-1 SOCIAL MEDIA ENGAGEMENT
- ENRICHMENTS
- APPOINTMENTS
- AGREEMENTS
- CLOSINGS

<b>10</b>					
					
<b>5</b>					
<b>1</b>	 <b>Social Media Engagement</b>				

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# Lead Generation

## **SESSION 5**

# Generate Your Leads

# Today's Agenda

  
Real Estate  
Expert



  
Lead  
Generation



  
Lead  
Follow-up



  
Transaction

Notes:

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My fear of failure was greater than my fear of lead generating.

Gary Keller

# You: the Lead Generator

## The Six Core Competencies of a Business

- 1 Lead generate, capture, and convert to appointments
- 2 Present to buyers and sellers and get agreement
- 3 Show buyers and market sellers
- 4 Write and negotiate contracts
- 5 Coordinate the sale to closing
- 6 Manage the money

## Lead Generation Fears and Myths

- I think lead generation is really difficult.

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- I don't have time to lead generate.

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- I don't know what to say.

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- I'm afraid of making mistakes.

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## Sphere of Influence

Your Sphere of Influence, or SOI, is the group of people you know and who know you. They not only know you, they like and trust you and are the most likely to do business with you or refer others to you.

Your SOI and your social media are the beginnings of your business database, or databank.

## SOI Income Opportunity



A. Number of contacts in phone	
B. Potential closing opportunity from contacts (A x .081*)	
C. Potential referrals in database (A x .10)	
D. Total potential (B + C)	
E. Average commission	
F. Income opportunity	

\*According to the National Association of REALTORS, the typical person moves every 8 years. And according to the 2020 U.S. Census, the home ownership rate in the U.S. is 64.8%. If we can assume that 64.8% of your database is a homeowner and they will move every 8 years, this means about 8.1% (.081) of your database will buy, sell, or buy and sell a home every 8 years.




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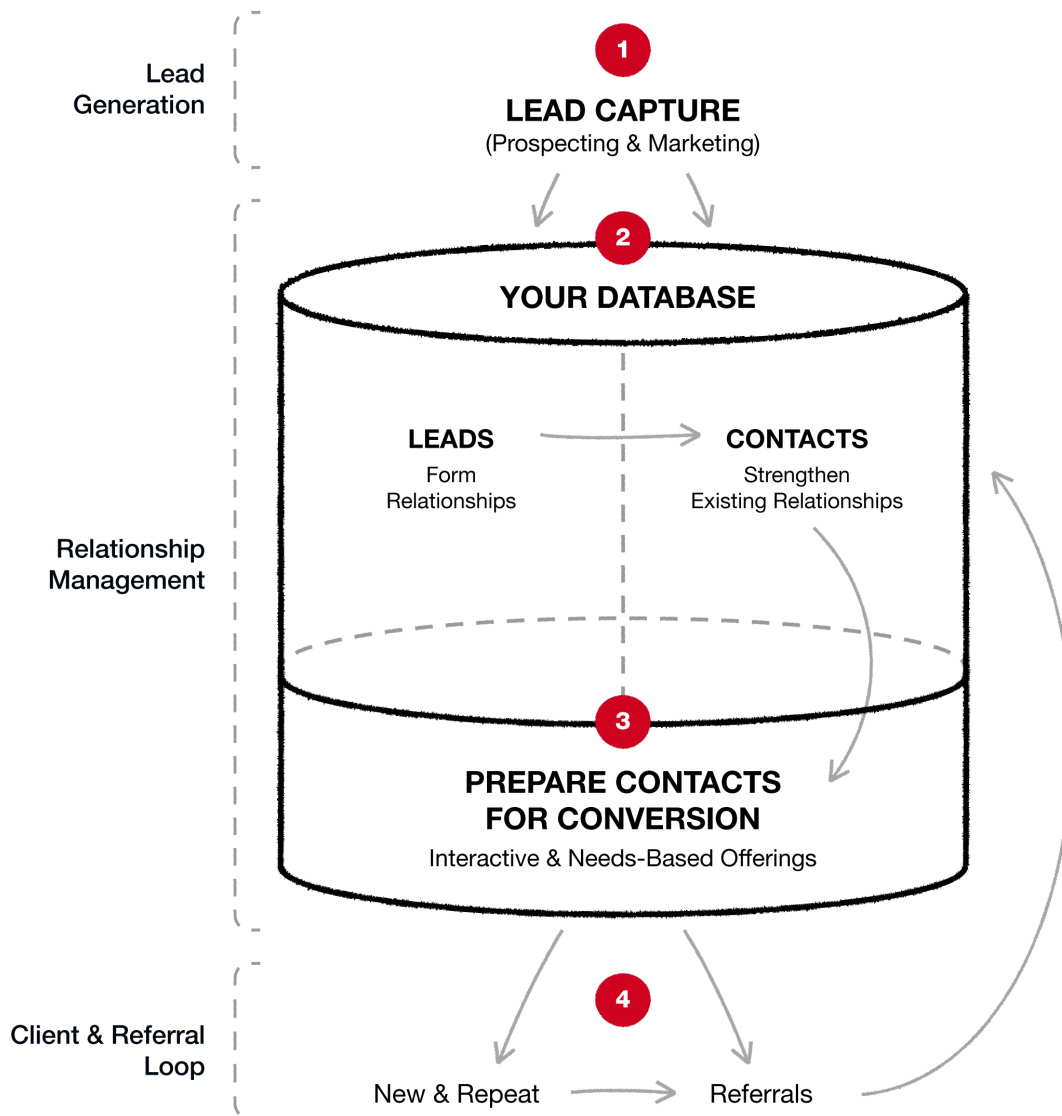
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# The Lead Generation and Database Model



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# Relationship Management

## Difference between a Database and a Smart Database / Databank

A **database** is a container that holds the information of your leads and contacts.

A **smart database/ databank** allows you to have planned and meaningful communication with your database.

## Definition of Leads vs. Contacts

### Leads

People who you have earned the right to at least have a one-way conversation with.

### Contacts

People you've held a two-way conversation with and whom you've established a value-based relationship with.

Notes:

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# Relationship Touches

Touch:

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Campaign:

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## Types of Lead Generation Touches

- Phone calls
- Emails
- Text messages
- Face-to-face meeting
- KW App
- Handwritten communication



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# Your Sphere of Influence



Category	People You Know
1. Immediate Family	
2. Friends	
3. Relatives	
4. Neighbors	
5. Past Coworkers	
6. Hobby / Sports Groups	
7. Teachers	
8. Worship / Club / Volunteer	
9. Professional Services	
10. Financial / Legal Services	
11. Personal Services	
12. Home / Auto Services	
13. Real Estate Agents	
14. Real Estate Services	
15. Other	





# Expand Your Sphere of Influence

## 1. Gather additional personal information

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## 2. Strengthen casual connections

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## 3. Join groups

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## 4. Ask for referrals

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# Lead Generation Best Practices

1. Track your lead sources
2. Audit your lead sources
3. Diversify your database
4. Be consistent
5. Time block for lead generation and lead follow-up

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# Protect Your Time Block

## 1. Build a bunker.

Where will you work to avoid distractions?

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## 2. Store provisions.

What provisions will you have in place?

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## 3. Sweep for mines.

What distractions will you remove?

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## 4. Enlist support.

Who will help you?

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**Aha's**

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# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?

How will your behaviors be different going forward? What **ACTIONS** will you take?

What **TOOLS**, models, or systems will you use? How will they make you accountable?



# Daily Success System

















## Success Activities

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### DAILY SUCCESS SYSTEM

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- APPOINTMENTS
- AGREEMENTS
- CLOSINGS

10					
					
5					
1	 <b>Social Media Engagement</b>				

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# Lead Generation

## **SESSION 6**

# Grow Your Database

# Today's Agenda



Notes:

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Your database is your business. Building up the number of names in it and a relationship with those names is really at the very core of what building a real estate business is all about.

**Gary Keller**  
*The Millionaire Real Estate Agent*

# Database Defined

## Database:

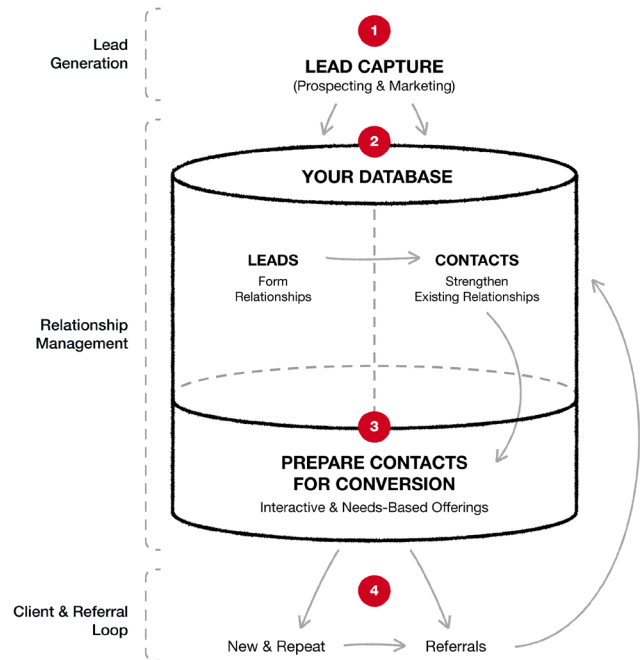
The container that holds the contact information for all your leads and contacts.

## Lead:

Someone who has shown interest in the services you offer and whom you can contact. You have the right to have a one-way conversation.

## Contact:

Someone that you've held a two-way conversation with and whom you have established a value-based relationship with (your Sphere of Influence).



Notes:

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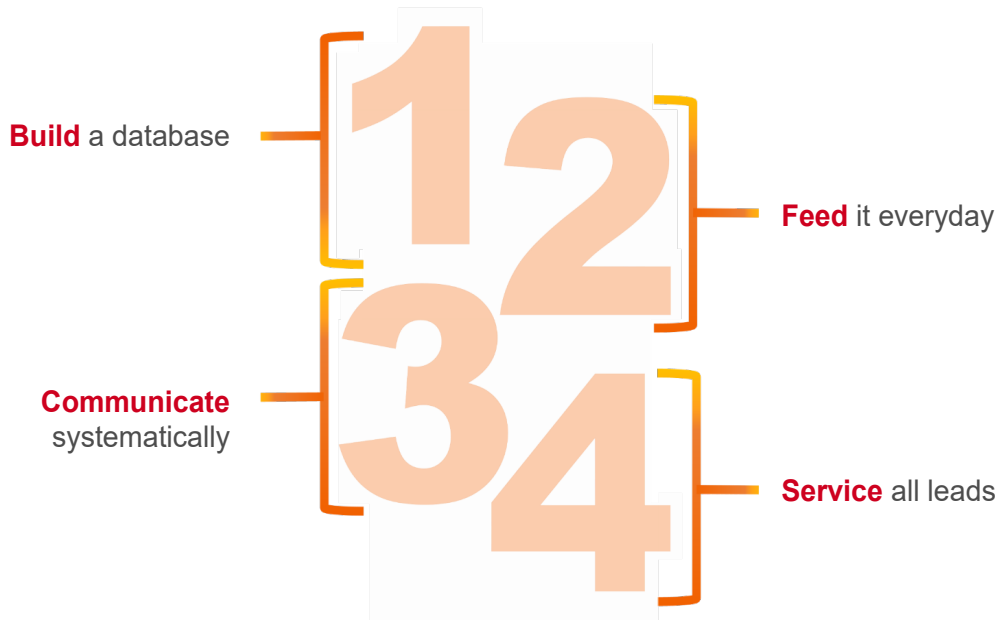


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# Four Laws of a Database



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# Testimonials and Reviews



Area of business or service	Who from my SOI could provide a testimonial or review?



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### 3. Communicate Systematically



To succeed at a high level in real estate sales, you must commit to frequent contact with a database with the intent of building close relationships.

**Gary Keller**  
*The Millionaire Real Estate Agent*

### Segment Your Database



Segments
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# Communicate with Value

## Leads

### 19 TO CONNECT

**4 Touches** Quarterly phone call

**12 Touches** Monthly e-mail, newsletter, market report, video

**2 Touches** Promotional direct mail, such as a magnet, calendar, printed market report, etc.

**1 Touch** Annual event, party, movie screening, get-together

**19 TOUCHES EACH YEAR**

### 1 TO CEMENT

A high value touch that solidifies the relationship you have just established and opens the door for future interactions.

**1 HIGH VALUE TOUCH**

## Contacts

### 36 TO CONVERT

**4 Touches** Telephone calls

**26 Touches** Bi-weekly email offering some type of information of value to the consumer

**2 Touches** Events, get togethers, parties

**4 Touches** Promotional direct mail, such as a magnet, calendar, market report, etc.

**36 TOUCHES EACH YEAR**

# Pair Touches with Value



Segment/Category:	Segment/Category:	Segment/Category:

## 4. Service All Leads

Benefits to servicing to all leads	Why it is important?
<i>Know the lead source</i>	
<i>Track the relationship</i>	
<i>Reward referrals</i>	



Your job is to build a community and serve the community.

Gary Keller




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# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?

How will your behaviors be different going forward? What **ACTIONS** will you take?

What **TOOLS**, models, or systems will you use? How will they make you accountable?

# Daily Success System

















## Success Activities

These are suggested activities for the second half of your session.



### DAILY SUCCESS SYSTEM

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10					
					
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1	 <b>Social Media Engagement</b>				

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# Lead Generation

## **SESSION 7**

# Capture Leads With Open Houses

# Today's Agenda

  
**Real Estate  
Expert**



  
**Lead  
Generation**



  
**Lead  
Follow-up**



  
**Transaction**

Notes:

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# Open Houses

Why hold open houses? What's their purpose?

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Nothing else about your business will have as big an impact on it as the number of leads you have.

**Gary Keller**

*The Millionaire Real Estate Agent*

Notice: Before engaging in in-person activities, consult your jurisdiction's rules regarding Covid precautions. Contact your local Realtor association for best practices.

Any reasons to not hold an open house?

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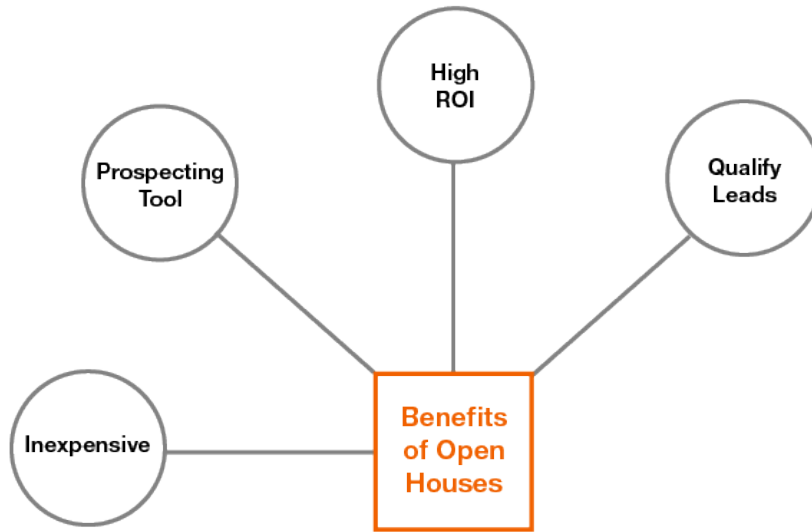
Who benefits from open houses?

- 1. Sellers \_\_\_\_\_
- 2. Buyers \_\_\_\_\_
- 3. Neighbors \_\_\_\_\_
- 4. You, the agent \_\_\_\_\_

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# The Benefits of Open Houses



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 **Aha's**

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# Open House Safety

Use the buddy system 


Charge your cell phone 




Arrive early



Turn on all the lights

Park on the street 

Check your local Covid guidelines 



Check all entrances and exits



Follow Market Center guidelines and checklists for Open Houses



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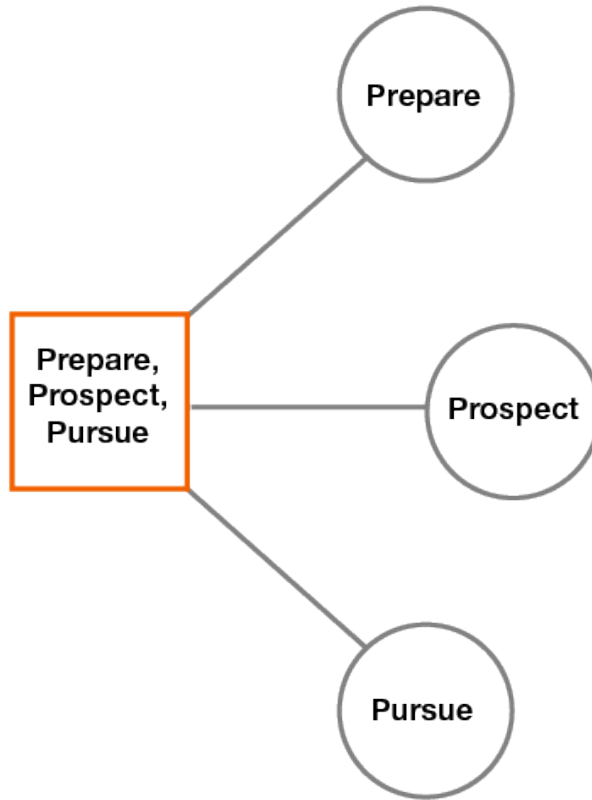
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# Prepare, Prospect, Pursue



The difference between “big” and “really big” is how you manage your time and focus.

**Gary Keller**

*The Millionaire Real Estate Agent*

Notes:

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# Preparing for an Open House

## *Up to three days before the open house*

- Set your open house goal
- Research local and state/province health precautions and requirements, such as those regarding Covid-19
- Confirm date/time of open house with listing agent
- Print a map of the neighborhood surrounding the open house (5 mile radius)
- Order 10 helium balloons for open house signs (if applicable)
- Print 100 flyers (include map)
- Get 1 yard sign with rider and put sign in yard
- Get 10 directional signs with riders
- Research sign-placement regulations (HOA, city, county, etc.)
- Mark on a map where you'll place signs
- Compile information on "alternative" properties. Print 5 copies of each
  - 2-3 properties in a lower price range
  - 2-3 properties in a higher price range
  - 1-2 properties with one more bedroom
  - 1 condominium
- Advertise the open house on social media. Post at least each day for the week leading up to the open house
- Generate a call list of 100 neighbors. Call in groups to invite them to the open house; leave a flyer at each door
- Role-play and practice conversations
- Make calls to invite your database to the open house
- Door-knock in the neighborhood to invite residents. Leave a flier if no one responds.
- Print two blank contracts (just in case you meet a motivated buyer)
- Prepare and know your personal stats, your Market Center stats and neighborhood stats
- Put together a home book to display at the open house or create a custom landing page in Command
  - Property photos
  - Details of property
  - Tax information
  - Survey a lot
  - Floor plans
  - School information
  - Community Information



# Preparing for an Open House

## *The day before the open house*

- Advertise the open house on social media. Post at least each day for the week leading up to the open house
- Place directional signs on key corners. Add balloons to signs if ordered
- Continue to door-knock in the neighborhood to invite residents. Leave a flier if no one responds
- Role-play and practice conversations
- Print contact tracing forms and/or Covid-19 release forms if required
- Review floor plan and decide where you'll set up your desk and your PPE station
- Test your custom landing page to make sure it is set up to record lead information or prepare your paper/pen registration method
- Assemble your showing kit:
  - Surface sanitizing wipes
  - Disposable face masks
  - Hand sanitizer
  - Phone Charger
  - Disposable shoe covers
  - Bottled water
  - Notepads
  - Flashlight
  - Toilet paper
  - Extra Business cards
  - Level
  - Pens
  - Paper towels
  - Trash bags
  - Measuring tape
  - Tissues

## *The day of the open house*

- Call and remind people about the open house
- Assess all entrances and exits upon arrival and make an exit/entrance plan for safety
- Role-play and practice conversations
- Set up your designated PPE area for the open house
- Bring work to stay productive during down time (e.g. blank note cards, phone, your database)
- Post 1 copy of your open house protocol outside the residence
- Arrive early and prepare the home:
  - Open all shades and drapes
  - Open windows (if weather permits)
  - Turn on all lights
  - Open interior and closet doors
  - Wipe counters, sinks, and surfaces that guests might touch
  - Ensure valuables, breakables, and prescriptions are safely hidden







# Plan an Open House



Make a plan and set goals for a future open house.

1. What date and time do you think would be the best to host an open house in your market?

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2. What is the price range of the home you intend to show?

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3. How many visitors would you like the open house to generate?

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4. How many leads do you plan to capture with your open house?

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5. How many appointments do you plan to set as a result of your open house?

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# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?

How will your behaviors be different going forward? What **ACTIONS** will you take?

What **TOOLS**, models, or systems will you use? How will they make you accountable?

# Daily Success System

















## Success Activities

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10					
					
5					
1	 <b>Social Media Engagement</b>				

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# Lead Generation

## **SESSION 8**

# Capture Leads With Social Media

# Today's Agenda

  
**Real Estate  
Expert**



  
**Lead  
Generation**



  
**Lead  
Follow-up**



  
**Transaction**

Notes:

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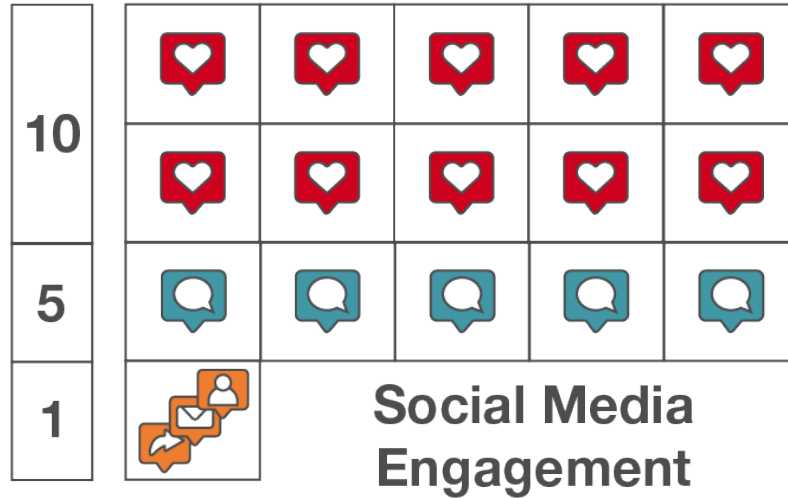
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# The 10 - 5 - 1 Engagement System



It takes time to learn something, more time to implement it, and even longer to approach mastery of it.

**Gary Keller**  
*The Millionaire Real Estate Agent*

Notes:

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[Follow the National Association of Realtors \(NAR\) guidelines for social media posting.](#)

# Connect On Social Media



Ask your fellow participants what social media platforms they currently use. If you use the same social media platform, exchange user names and profile links. Then, connect with your facilitator and fellow participants.

1. Which apps are popular?

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2. Did anyone use a social media platform you currently don't use? Set up a profile and connect.

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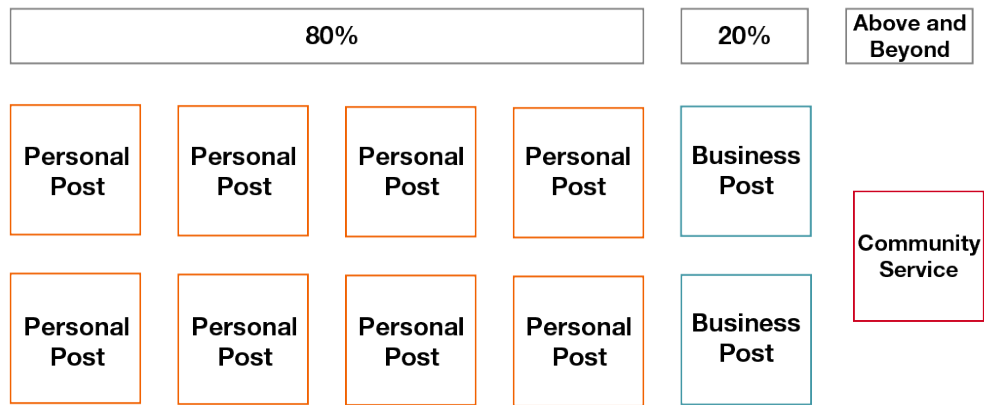
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# The 80/20 Posting Practice



Notes:

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# Brainstorm Your Social Media Passions



Make a list of things you're passionate about:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_



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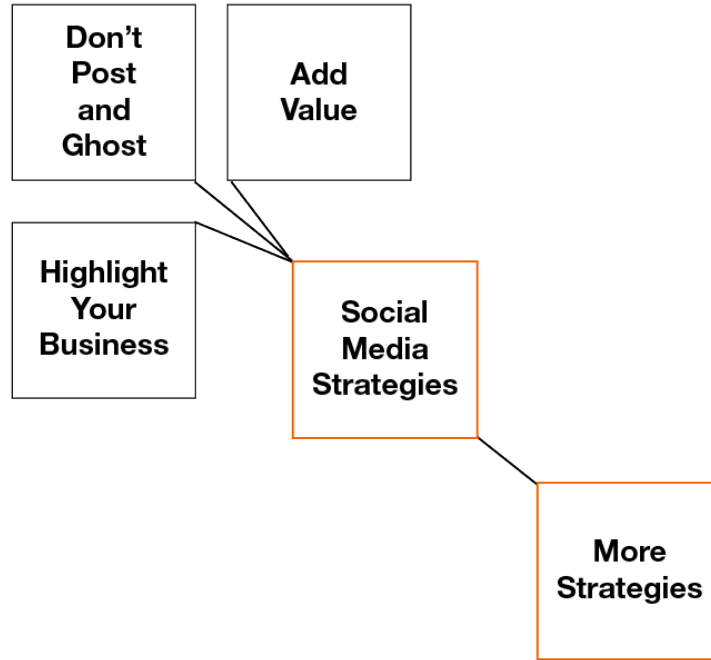
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# Social Media Strategies



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# Post on Social Media



Pair up to plan and post to social media:

1. Use the data from your local MLS to construct a statement followed by a question as if you were updating your status. For example:
  - Homes stay on the market for an average of 40 days in Denver. Curious about your neighborhood?
  - Who says no one is buying or selling in this economy? Last month, 563 homes sold in Boise.
  - The average home price in Springfield is \$168,240. Curious about what your home is worth?
2. Each of you will post it to social media, and then respond to each other's post with a comment or question. Note: You may need to "friend" each other first.
3. Watch for comments and likes to appear!

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Post:

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Comment or question:

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# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?

How will your behaviors be different going forward? What **ACTIONS** will you take?

What **TOOLS**, models, or systems will you use? How will they make you accountable?



# Daily Success System

















## Success Activities

These are suggested activities for the second half of your session.



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10					
					
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*Skills to Spark a Great Career*



# Lead Generation

## **SESSION 9**

# Capture More Leads



# Today's Agenda

  
**Real Estate  
Expert**



  
**Lead  
Generation**



  
**Lead  
Follow-up**



  
**Transaction**

Notes:

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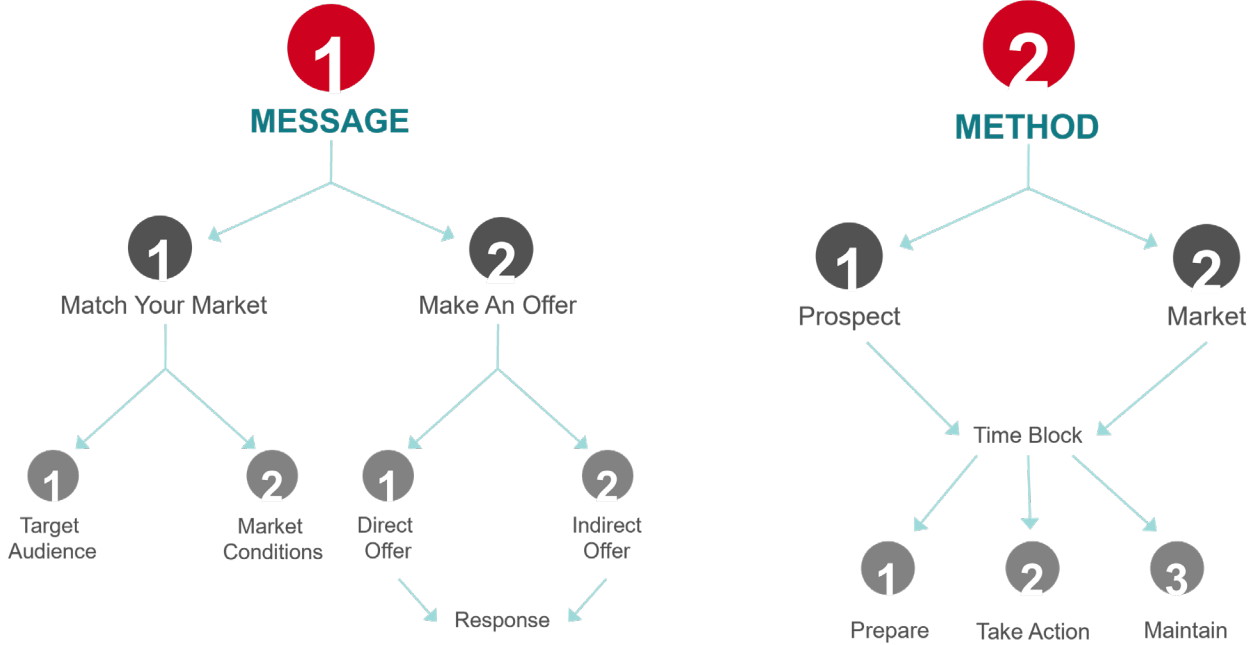
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# Systems That Work



Notes:

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You love people but at the same time you haven't yet learned to love hunting for them.

**Gary Keller**  
*SHIFT*

# Leads are Everywhere

1. Approach

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2. Connect

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3. Ask

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Your number one job ... is to find ways to get in the path of motivated buyers and sellers.

**Gary Keller**

*SHIFT*



**Aha's**

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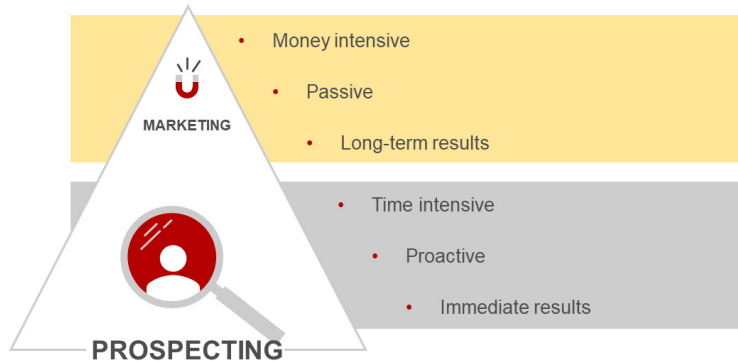
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# Prospecting vs. Marketing



## Prospecting

1. Phone or Face to Face
  1. Listings without agency
    1. FSBOs (For Sale By Owners)
    2. Expired Listings
  2. Circle Prospecting
    1. Neighborhoods
    2. Apartment Complexes
    3. Recently Sold Listings
    4. Recently Listed Properties
  3. Community Outreach
    1. Charity
    2. Volunteer Work
  4. Key Relationships
    1. Corporations
    2. Builders
    3. Banks
    4. Third-Party Data Companies
    5. Investors
  5. Teaching and Speaking Opportunities
  6. Meals
  7. Door-to-Door Canvassing
  8. Networking Events
  9. Booths and Kiosks
  10. Walk-ins



Lead generation is a contact sport with simple rules. It means making contact with people through prospecting and marketing.

**Gary Keller**  
*SHIFT*

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# Prospecting vs. Marketing

## Marketing

1. Offline Advertising
  1. Radio
  2. TV
  3. Newspapers
  4. Personal Vehicles
  5. Bus Stop/Benches
  6. Magazines
  7. Billboards
  8. Yellow Pages
  9. Grocery Carts
  10. Moving Vans
2. Online Advertising
  1. Pay Per Click Advertising
  2. SEO
  3. Social Media
  4. Portals
3. Broadcast/Content Creation
  1. Radio Segments
  2. TV Shows
  3. Live Social Media
  4. Blogs

4. Direct Mail
  1. Postcard Campaigns
  2. Special Events Cards
  3. Just Sold/Just Listed Cards
  4. Quarterly Market Updates
5. Promotional Items/Swag
6. Public Relations/Press
  1. News Releases
  2. Advice Columns
7. Sponsorship

## Both

1. Farming
  1. Geographic
  2. Demographic
2. Events
  1. Open Houses
  2. Seminars
  3. Contests
  4. Client Appreciation Events
3. Networking
  1. Sphere
  2. Past Clients
  3. Allied Resources
  4. Agents
4. Purchased
  1. Referral Networks
  2. Advertising Networks
  3. Clientele

Notes:

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# Goldmine of Referrals

## Client Referrals

1. Always provide value
2. Ask for referrals
3. Reward for referrals
4. Thank with handwritten note

Learn more from Fill Your Funnel with Client Referrals in the series No Ceilings - Level Up Your Lead Generation on Connect.

## Referral Conversations

- My goal by the end of the transaction is for you to be so thrilled you will tell everyone about me.
- Who do you know that would like an experience as you've had?
- If I have provided a stellar experience, it would be the greatest gift if you refer me to friends, family, and coworkers so I may provide them the same experience.

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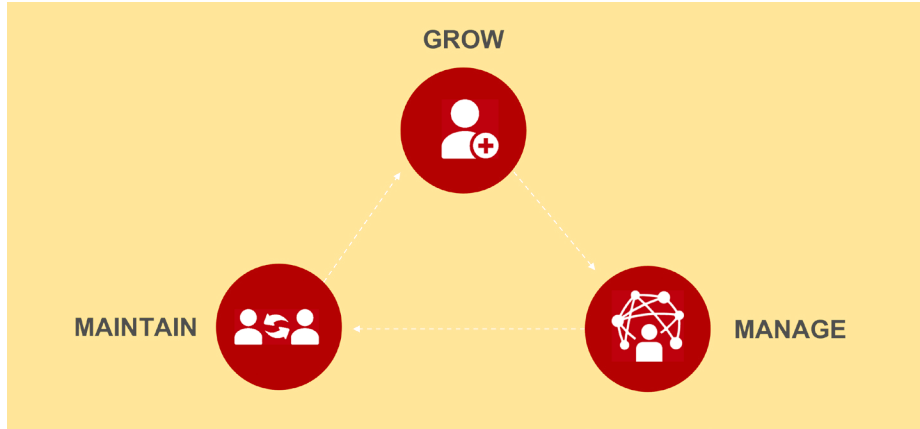
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## Agent-to-Agent Referrals



Learn more from Anchor Your Business with Agent Referrals in the series No Ceilings - Level Up Your Lead Generation on Connect.

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Access the KW Agent-to-Agent Referral Network in Command.

## Worldwide Referrals

Notes:

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# More Lead Sources

## Geographic Farming

Maximize your prospecting and marketing efforts within a geographical farm area. Consider open houses, social media, and your Daily Success System.

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## Door Knocking Ideas

- Share, “Did you know homes in our neighborhood are selling in less than 30 days?”
- Share, “The home over on Mayberry just sold for \$350K! That means home values are going up.”
- Vendor referrals: “My clients seem to like ABC Company.”
- General info on the area: New construction, future construction, road changes, changes in building code or permits, etc.
- Set up a discount with a local vendor for a neighborhood tree trimming, dryer vent or chimney cleaning. Individuals pay for their own service and you get everyone’s contact information to coordinate with the vendor!
- Set up a neighborhood food drive where you go around and pick everything up for delivery.

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# Events and Seminars

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 **Aha's**

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# Lead Generation Plan



Source	✓	Strategy	By When
Sphere			
Database			
Open House			
Social Media			
Referrals			
Geographic Farm			
Events			
Seminars			
Other:			



# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?

How will your behaviors be different going forward? What **ACTIONS** will you take?

What **TOOLS**, models, or systems will you use? How will they make you accountable?

# Daily Success System

















## Success Activities

These are suggested activities for the second half of your session.



### DAILY SUCCESS SYSTEM

- \_\_\_ of 10 CONVERSATIONS
- \_\_\_ of 10 CONTACTS ADDED
- \_\_\_ of 10 HANDWRITTEN NOTES
- 10-5-1 SOCIAL MEDIA ENGAGEMENT
- ENRICHMENTS
- APPOINTMENTS
- AGREEMENTS
- CLOSINGS

10					
					
5					
1	 <b>Social Media Engagement</b>				

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Lead  
Follow-up

**SESSION 10**

Keep Every Lead

# Today's Agenda

  
**Real Estate  
Expert**



  
**Lead  
Generation**



  
**Lead  
Follow-up**



  
**Transaction**

Notes:

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# Lead Follow-Up

## What is a lead?

Someone who has shown interest in the services you offer and with whom you may have a one-way conversation.

## What is lead follow up?

Think of the leads you enter into your database as your possible business. Lead follow-up helps turn the leads from possible business into probable business, with the end goal being a profitable business.

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 If you aren't first or second in their mind, you probably won't get the business.

*The Millionaire Real Estate Agent*




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# Lead Follow Up: Best Practices

**Instructions:** Read each set of considerations and write down your response for each in the space below.

What are my strengths when working with people? How can I adapt the touches of 19 to Connect to represent me?

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What are some reasons I might have for contacting the lead? What are some touches to do before and after a phone call?

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How am I using conversations to let the person know I am in real estate, how to contact me, and how to refer business to me?

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When is it best for me and my business to time-block for lead follow-up?

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How much time should it take to reach out to a lead? What will I do to hold myself accountable? What do I need to do to make sure this happens?

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## Design Your Annual 19 to Connect Plan



Annual Occurrence	Activity	Plan	Cost
4	Calls / Texts / Conversations		
12	Email, newsletter, market report, video, etc.		
2	Promotional direct mail		
1	Event		

Notes:

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## Communicate with Value

Knowing the source of a lead informs you on how you can narrow your range of value and can inform you on how you can pair a value with your communication.

**First**, write down your current lead source in the first column.

**Second**, record your top lead sources along the left-hand side of the table. Then write statements or questions you might use when communicating with that lead source.

Lead Source	Questions or statements to use with communication
<i>Example:</i> Incoming call or text	- Why are you thinking about buying/selling? - Tell me more. - What will that do for you and/or your family?




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# Post Lead Follow-up

When a lead opens the door for two-way conversation you will cement the relationship.

**1 TO CEMENT**

A high value touch that solidifies the relationship you have just established and opens the door for future interactions.

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**1 HIGH VALUE TOUCH**

## The 1 to Cement touch should:

- Tell them about the service you provide
- Help set up a conversation for later
- Serve as a reminder of the interaction
- Tell them how to refer business to you

What are some options you could offer as your 1 to Cement? What are other agents using and finding success with?

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**Aha's**

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# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?

How will your behaviors be different going forward? What **ACTIONS** will you take?

What **TOOLS**, models, or systems will you use? How will they make you accountable?

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- CLOSINGS

10					
					
5					
1	 <b>Social Media Engagement</b>				

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*Skills to Spark a Great Career*



Lead  
Follow-up

**SESSION 11**

Follow Up with  
Leads





# Today's Agenda

  
**Real Estate  
Expert**



  
**Lead  
Generation**



  
**Lead  
Follow-up**



  
**Transaction**

Notes:

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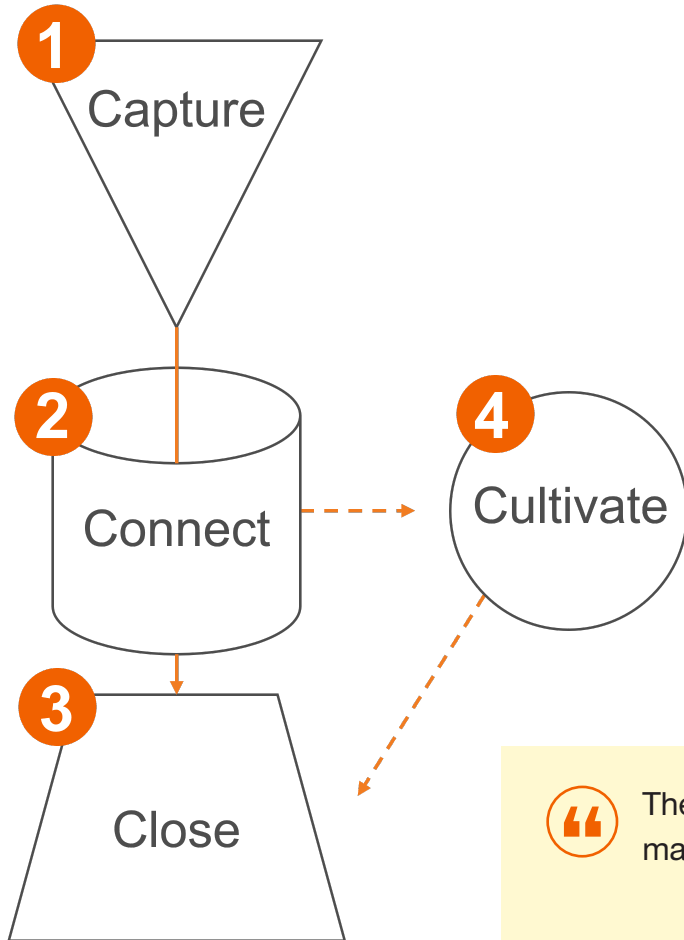
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# The Lead Conversion Process

**Lead generation** is when you turn activities (prospecting and marketing) into leads.

**Lead conversion** is the process and activity that turns leads into appointments (with the end goal of a transaction).



The effort you give to converting leads must match the effort you give to generating them.

Gary Keller  
*SHIFT*



Aha's

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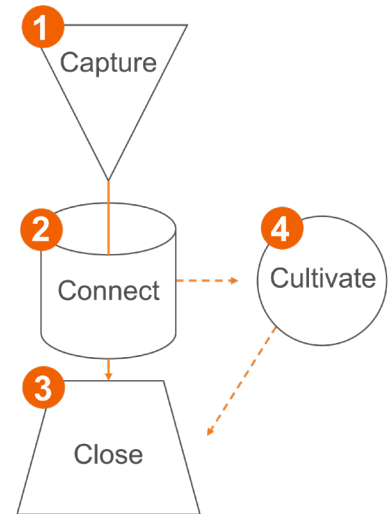
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# How to Convert

## 1. Capture

**Capture** is collecting the minimum amount of valid contact information for a potential buyer or seller. This should include their names and a way to get a hold of them, such as email and a phone number.

- “If I were to need to contact you, what would that number be?”
- “If I found exactly what you are looking for, how would I contact you?”
- If I found out that information you are wanting, how would I get it to you?”



How are you currently capturing leads?	What information are you collecting?
What are your current lead categories/tags?	What can you do to improve your current capture system?

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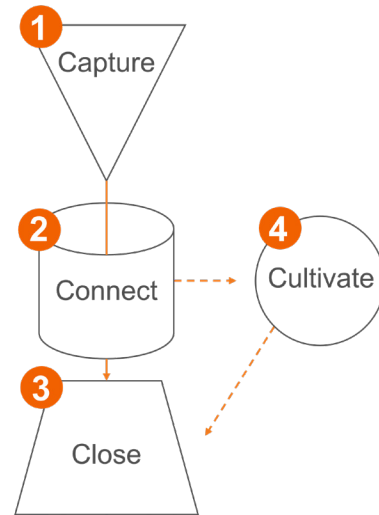


## 2. Connect

**Connect** is about laying the foundation for a working relationship. In this step it is important to:

- Listen
- Ask good questions
- Offer solutions
- Keep the focus of the conversation on them

The goal of the communication, in addition to building the relationship, is to determine their urgency, give enough information to know how to prioritize this lead, and help you know what touch campaign you can use as a follow up plan.



### Keep these connection best practices in mind:

- Embed your value proposition into the conversation to position yourself as the local expert
- Build and have confidence through knowing what you are going to say. Role play, practice conversations, and know the market data.
- Use backward design when thinking about your communication. Think about the intended outcome to be before starting the conversation. Use questions to help lead them towards the appointment.

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# The Six Connection Questions

Connecting is more than just small talk. Your communication should seek to answer six basic questions.

## 1. Who are they?

- Example: “Back up, and if you would, please tell me a little about yourself.”
- Objective: You’re looking for as much personal information about them and their situation as they are willing to share: marital status, kids, pets, jobs, etc. These are the details that you’ll later put in your database to reconnect with them in the future.

## 2. What do they want or need to do?

- Example: “Thanks for sharing that. Now, if you would, please tell me what you want to do?”
- Objective: You’re beginning to assess their wants, needs, and current plans.

## 3. Where do they want or need to do it?

- Example: “Thanks for sharing that. Now, if you would, can you share with me where you’re thinking of moving?”
- Objective: Now you’re trying to get an understanding of their current situation.

## 4. Why do they want or need to do it?

- Example: “Thanks for sharing that. Now, if you would, can you share with me why you’re doing this?”
- Objective: You’re trying to determine their motivation.

## 5. When do they want or need to do it?

- Example: “Thanks for sharing that. Now, if you would, can you please share with me when you’d like to do this?”
- Objective: You’re getting a feel for their timetable.

## 6. How do they plan to do it?

- Example: “Thanks for sharing that. Now, if you would, can you please share with me what you’ve already done to plan for this?”
- Objective: You’re accessing what they have already done, their expectations, and perhaps their experience.

Check out SHIFT to learn more about the Six Connection Questions

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# Connection Questions for Buyers and Sellers

## Sample Questions for **Buyers**

- What are you looking for in your dream home?
- What happens if you can't find a house to buy?
- Have you seen any houses you like?
- What areas are you interested in?
- What's prompting your move?
- When do you want to be in your new home?
- Do you own the place where you are living now?
- How have you been searching?
- How long have you been looking?
- What is your time frame to move?
- Have you talked with a real estate agent about selling your current home?
- Are you pre-approved with a lender?
- What price range do you have in mind?

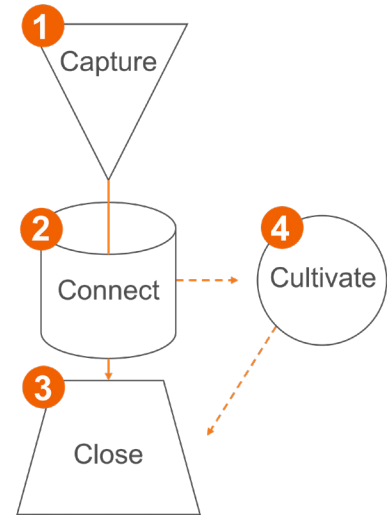
## Sample Questions for **Sellers**

- How did you happen to hear about my services?
- What is the address of your home? (If they are asking for a Comparative Market Analysis (CMA))
- What's prompting you to move?
- What's your time frame to move?
- When do you have to or want to be out of your home?
- Are you working with an agent?
- Are you interviewing other agents?
- How much do you think your home is worth?

## 4. Cultivate

The goal of the Lead Conversion Model is to move immediately from capture, to connect, and to close, however, you'll find a small percentage of leads that won't be ready to convert to an appointment.

To keep mind share, you will need to use a touch campaign to stay in communication and cultivate the relationship until they are ready for an appointment.



Why do you think agents struggle in the cultivation stage?

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You can't know or predict when they will come to a decision, but if you're reconnecting with them in a systematic way, you'll have a great chance of being there when they do. That's when you'll be able to close for an appointment.

**Gary Keller**  
*SHIFT*

Notes:

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### 3. Close

Closing is when you ask for the appointment. You are concluding one conversation and seeing if there is a new one that can take place. It is your responsibility to ask for the appointment.

What will you confirm for the appointment?

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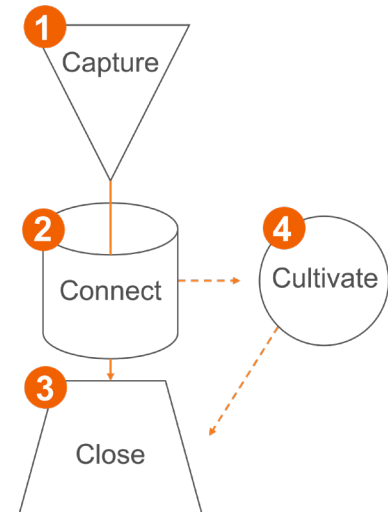
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Different ways to ask for the close:

1. The Hard Close
  - “Let’s meet!”
2. The Soft Close
  - “I’ve really enjoyed visiting with you. Would you like to get together to discuss this further?”
3. The Direct Close
  - “Can we meet today?”
4. The Indirect Close
  - “Would it be okay if I got you some information to look over and then can we meet to discuss?”
5. The Trial Close
  - “Have we gone over enough today that meeting would be our next step?”
6. The Assumptive Close
  - “It sounds like we should meet. I am available most times this week so what works best for you?”
7. The Negative-Positive Close
  - “Would you be offended if I asked if we could meet to go over this?”
8. The Take Back Close
  - “I’ve really enjoyed visiting with you. To be honest, I’m not sure if I can be of help or not, but I’d be honored if we could meet to find out.”
9. The Tie Down Close
  - “Wouldn’t it make sense for us to meet in the next day or so?”
10. The Alternative Choice Close
  - “What works better for you? Meeting today, sometime this afternoon, or tomorrow morning?”

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# Conversion and the KW Belief System



In the end if they can meet and have a good enough reason to meet, they will meet. And if they don't, they won't. And that's okay. You really don't care what their answer ultimately is because you're not getting people to do anything they don't want to do. You're just going to ask and respond until they agree that meeting with you makes sense, or it doesn't. Either way you both win.

*SHIFT*

**WIN-WIN** or no deal

**INTEGRITY** do the right thing

**CUSTOMERS** always come first

**COMMITMENT** in all things

**COMMUNICATION** seek first to understand

**CREATIVITY** ideas before results

**TEAMWORK** together everyone achieves more

**TRUST** starts with honesty

**EQUITY** opportunities for all

**SUCCESS** results through people

Which part of the Keller Williams belief system is represented in the quote above? Why?

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## Aha's

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# Improve Your Conversion Rates

## Calculate Conversion Rates

Your conversion rate is the rate at which you get every lead to an appointment.

You should convert at the highest percentage possible. The higher the percentage, the more leads have converted to appointments. If you are converting at a low percentage this should tell you that you have a lead conversion challenge. The challenge is not the number of leads generated, but your ability to get them to an appointment.

### Part One: answer each question

- A. How many new people do you make a week? \_\_\_\_\_
- B. How many of those meet your definition of a lead? \_\_\_\_\_
- C. How many of those leads became appointments? \_\_\_\_\_
- D. How many appointments signed contracts? \_\_\_\_\_

### Part Two: use the equations below and the numbers from Part One to complete the calculations below.

1.  $\frac{\boxed{\text{B}}}{\boxed{\text{A}}} \times 100$    
Contacts to Leads Conversion

2.  $\frac{\boxed{\text{C}}}{\boxed{\text{B}}} \times 100$    
Leads to Appointments Conversion

3.  $\frac{\boxed{\text{D}}}{\boxed{\text{C}}} \times 100$    
Appointments to Listings Taken Conversion



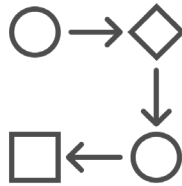
# Improve Your Conversion Rate

**1**



Time Block

**2**



Use Systems and Conversations

**3**



Connect with your Whole Database

**4**



Prioritize Qualified Leads

## 1. Time Block

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## 2. Systems and Conversations

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## 3. Connect with Everyone

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## 4. Prioritize Qualified Leads

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# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?

How will your behaviors be different going forward? What **ACTIONS** will you take?

What **TOOLS**, models, or systems will you use? How will they make you accountable?





# Daily Success System

















## Success Activities

These are suggested activities for the second half of your session.



### DAILY SUCCESS SYSTEM

- \_\_\_ of 10 CONVERSATIONS
- \_\_\_ of 10 CONTACTS ADDED
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10					
					
5					
1	 <b>Social Media Engagement</b>				

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*Skills to Spark a Great Career*



Lead  
Follow-up

**SESSION 12**

Strengthen  
Relationships



# Today's Agenda

  
**Real Estate  
Expert**



  
**Lead  
Generation**



  
**Lead  
Follow-up**



  
**Transaction**

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# Establish the Mindset

Lead

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Contact

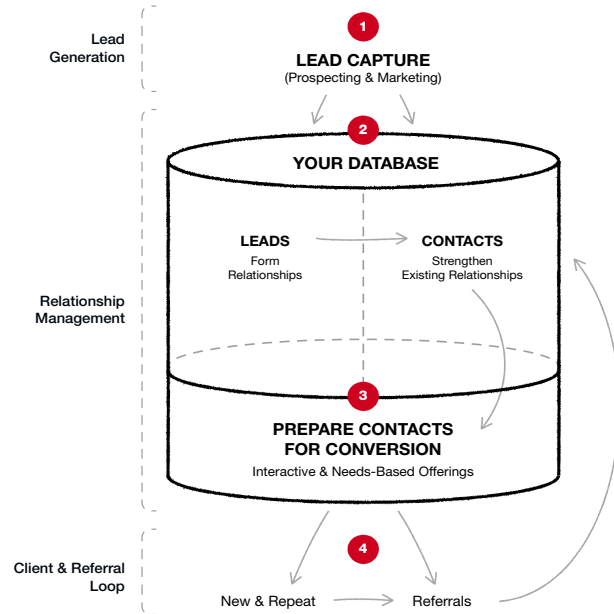
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Know that growth comes from clarity, priorities, and focused action.

SHIFT

Notes:

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Once you meet your new contacts you either do business with them immediately or you don't. Either way, once you've met them you put them in your database and stay in touch with them forever.

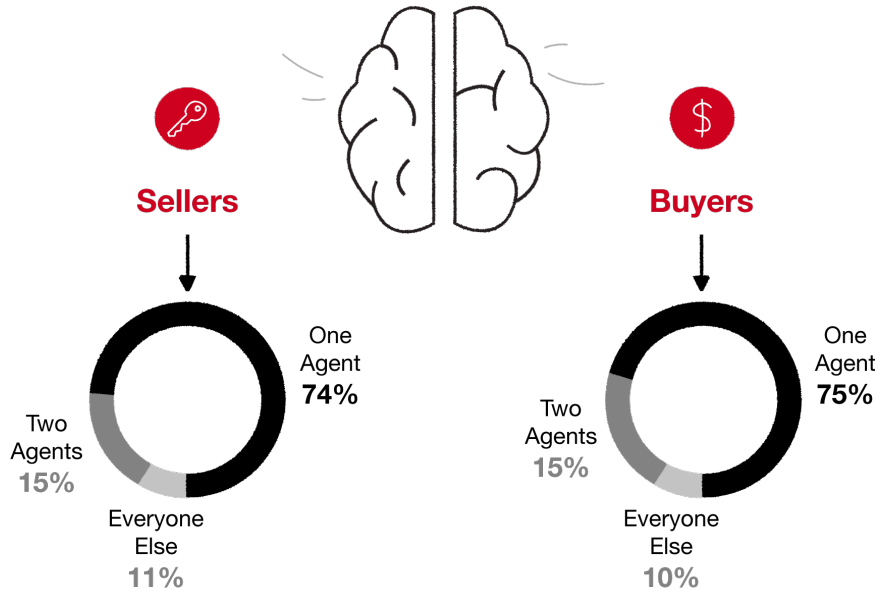
SHIFT

# Identify Goals

- 1. Convert contacts to closed business
- 2. Stay top of mind with your contacts
- 3. Leverage mind share for referral business

## REAL ESTATE MIND SHARE POSITIONING

Number of agents interviewed before choosing an agent



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# Devise the Plan

## TOUCH PLAN

### COMMUNICATE WITH YOUR DATABASE

<p style="text-align: center;"><b>19 to Connect</b></p> <p><b>4 Touches</b> Quarterly phone calls</p> <p><b>12 Touches</b> Monthly email, newsletter, market report, video</p> <p><b>2 Touches</b> Promotional direct mail, such as a magnet, calendar, printed market report, etc.</p> <p><b>1 Touch</b> Annual event, party, movie screening, get-together</p>	<p style="text-align: center;"><b>36 to Convert</b></p> <p><b>4 Touches</b> Telephone calls</p> <p><b>26 Touches</b> Bi-weekly email offering some type of information of value to the consumer</p> <p><b>2 Touches</b> Events, get-togethers, parties</p> <p><b>4 Touches</b> Promotional direct mail, such as a magnet, calendar, market report, etc.</p>
<p><b>1 to Cement</b></p> <p>A high value touch that solidifies the relationship you have just established and opens the door for future interactions.</p>	

### Six Connection Questions

1. Who are they?
2. What do they want or need to do?
3. Where do they want or need to do it?
4. Why do they want or need to do it?
5. When do they want or need to do it?
6. How do they plan to do it?

Notes:

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# MOFIR

## What is a MOFIR?

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## MOFIR Examples

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1. This awesome house just came on the market. If you're looking for a home in this neighborhood, call me right away!
2. Interest rates are the lowest ever! If you're considering buying now or thinking about refinancing, I can put you in touch with lenders who can work with you.
3. Do you know about the prices of homes in your neighborhood or any area of town? I've got just the report for you. Call, text, or visit my website to sign up

Notes:

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# Develop Your 36 Touch Plan



Next to each touch below, write down message or focus of the touch. For example, one call might be a birthday call, a promotion direct mail could be a magnet with the dates of games for a local sport team, and your biweekly email might be a neighborhood nurture.

	Message Content
Telephone call 1	
Telephone call 2	
Telephone call 3	
Telephone call 4	
<b>26</b> Biweekly emails offering something of value	
Event 1	
Event 2	
Promotional Direct Mail Items of Value	
Promotional Direct Mail Items of Value	
Promotional Direct Mail Items of Value	
Promotional Direct Mail Items of Value	

## Goal Setting to the Now

Calculate the number of telephone touches based on the number of contacts in your database..

Number of contacts \_\_\_\_\_ x 4 = \_\_\_\_\_ calls per year

Divide by 12 = \_\_\_\_\_ calls per month

Divide by 4 = \_\_\_\_\_ calls per week

Divide by 5 = \_\_\_\_\_ calls per day

Commit to including the number of calls you calculated in your daily lead generation.

## Leverage Resources for Touch Plans

**Use SmartPlans** Visit [answers.kw.com](https://answers.kw.com) and access the following help articles:

- Add a SmartPlan from the SmartPlans Library
- Add Contacts to a SmartPlan
- Edit an Active SmartPlan

**Create touch content in Designs** Visit [answers.kw.com](https://answers.kw.com) and access articles to get started with Designs:

- Get Started with the Print and Social Design Editor
- Create a Print Marketing Design in Command
- Create an Email Template in Designs

## Learn More, Earn More

Take [No Ceilings: Level Up Your Lead Generation](#) on KW Connect

- Build a Bulletproof Business with Your Sphere
- Deliver Unforgettable Experiences with Virtual Events



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# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?


How will your behaviors be different going forward? What **ACTIONS** will you take?

What **TOOLS**, models, or systems will you use? How will they make you accountable?

# Daily Success System

















## Success Activities

These are suggested activities for the second half of your session.



### DAILY SUCCESS SYSTEM

- \_\_\_ of 10 CONVERSATIONS
- \_\_\_ of 10 CONTACTS ADDED
- \_\_\_ of 10 HANDWRITTEN NOTES
- 10-5-1 SOCIAL MEDIA ENGAGEMENT
- ENRICHMENTS
- APPOINTMENTS
- AGREEMENTS
- CLOSINGS

10					
					
5					
1	 <b>Social Media Engagement</b>				

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*Skills to Spark a Great Career*



Lead  
Follow-Up

**SESSION 13**

Qualify Potential  
Buyers and Sellers





# Today's Agenda

  
**Real Estate  
Expert**



  
**Lead  
Generation**



  
**Lead  
Follow-up**



  
**Transaction**

Notes:

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Your number one job as a real estate agent is to find ways to get in the path of motivated buyers and sellers.

**Gary Keller**  
*SHIFT*





# Find the Motivated

## Dispel Mythunderstandings

What beliefs do you hold about finding buyers and sellers?

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What statistics about how buyers found their agent stand out?

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What statistics about how sellers found their agent stand out?

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**Aha's**

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# Classify by Able, Ready, and Willing



Focus becomes increasingly possible in direct proportion to how clear you are about what you want, when you want it, and what you must do to get it.

**Gary Keller**

*The Millionaire Real Estate Agent*

How do you define Able, Ready, and Willing?

Able: \_\_\_\_\_

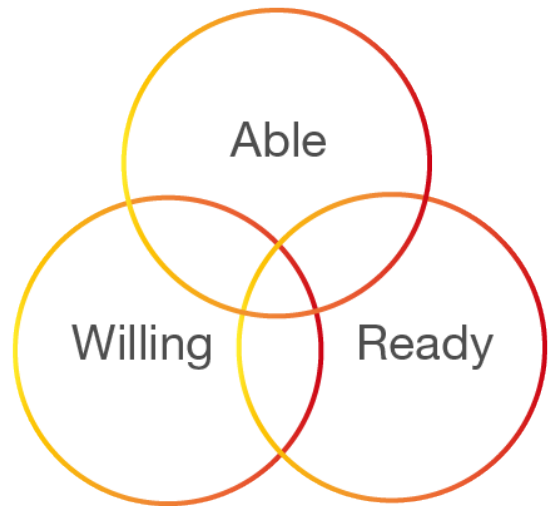
\_\_\_\_\_

Ready: \_\_\_\_\_

\_\_\_\_\_

Willing: \_\_\_\_\_

\_\_\_\_\_



When do we anticipate each type of buyer or seller will be ready to transact?

A Buyers/Sellers	B Buyers/Sellers	C Buyers/Sellers

 **Aha's**

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# Qualify Buyers and Sellers

Qualifying is Win-Win

1. Document
2. Follow a checklist
3. Abide by Fair Housing Regulations

Notes:

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# Qualify Buyers

## Buyer Lead Sheet

Date: \_\_\_\_\_

Lead Source/Property that prompted the call: \_\_\_\_\_

Contact Information	
Name:	_____
Email:	_____
Street Address:	_____ _____
Childrens' Names:	_____
Home Phone:	_____
Mobile Phone:	_____
What is the best way to get in touch with you?	_____
What times are best?	_____

Buyer Consultation Prequalification Questions	
1. Has an agent taken you out and shown you any properties? <input type="checkbox"/> YES <input type="checkbox"/> NO If yes, how is it going?	_____
2. Is there anybody else buying the home with you?	_____
3. Who will be living in your home?	_____
4. How long have you been looking for a home?	_____
5. I'm curious, why are you moving?	_____



# Qualify Buyers

## Buyer Lead Sheet

6. Are you renting now, or do you own?    RENT    OWN

*Renter:* Do you know when your lease is up? \_\_\_\_\_

*Owner:* Do you need to sell your current home before you buy your next home?

YES    NO

*If yes:* Have you signed a listing agreement with a real estate agent to sell your home?

YES    NO

*If no:* When would be a good time for us to get together so I can give you a free market analysis on your home? \_\_\_\_\_

7. Are you going to be paying cash or will you be getting a mortgage for the purchase of your home?    CASH    MORTGAGE

*Mortgage:* Have you already been preapproved by a lender?    YES    NO

*If yes:* Who are you working with? \_\_\_\_\_

*If no:* Do you need a lender recommendation? \_\_\_\_\_

What is the amount you are preapproved for? \_\_\_\_\_

What will your down payment be? \_\_\_\_\_

8. What price are you comfortable with? \_\_\_\_\_

9. Is anyone else involved in your home buying decision? \_\_\_\_\_

10. On a scale of 1 to 10 with 10 meaning you must buy a home as quickly as possible and 1 meaning you are not sure you'll really buy anything, how would you rate yourself? \_\_\_\_\_

*Anything less than 10:* What would it take for you to become a 10?

\_\_\_\_\_

\_\_\_\_\_

11. When do you need to be in your new home? \_\_\_\_\_

12. I'd love to help you buy a home. In order to help you find a perfect home, all we need to do is set an appointment (with all of the decision makers) so I can help you get what you want in the time you want. What is a better time for us to meet? \_\_\_\_\_ day at \_\_\_\_\_ time, or \_\_\_\_\_ day at \_\_\_\_\_ time?

Appointment Date & Time: \_\_\_\_\_





# Qualify Sellers

## Pre-listing Questionnaire

Seller (s) Name(s): _____		
Email: _____		
Street Address: _____		
Home Phone: _____		Mobile Phone: _____
Appointment Date: _____	Time: _____	Location: _____
<i>Do you have about 5 minutes so I can ask you some very important questions before I come out to meet you?</i>		
1. How did you hear about me?		
2. Where are you moving?		
3. What's motivating you to move there?		
4. How soon do you have to be there?		
5. If we sell your home in the next 30 days, will that pose a problem for you? If "yes," what would the problem be?		
6. What would happen if your home did not sell?		
7. How much do you want to list your home for?		
8. How much do you owe on the property?		
9. I'll be sending you a packet of information. Will you take a few minutes to review it before we meet?		
10. Do you have any questions before we meet?		
11. Will all decision-makers be there when we meet?		
<i>Just so you know, our meeting will take between _____ and _____ minutes, OK?</i>		
<i>I look forward to meeting with you on _____ at _____.</i>		







# Lead Follow-Up Plan



Source	✓	Strategy	By When
Follow Up			
Convert			
Stay top of mind			
Qualify Buyers and Sellers			



# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?

How will your behaviors be different going forward? What **ACTIONS** will you take?


What **TOOLS**, models, or systems will you use? How will they make you accountable?



# Daily Success System

















## Success Activities

These are suggested activities for the second half of your session.



### DAILY SUCCESS SYSTEM

- \_\_\_ of 10 CONVERSATIONS
- \_\_\_ of 10 CONTACTS ADDED
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10					
					
5					
1	 <b>Social Media Engagement</b>				

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# Transaction

**SESSION 14**

## Win the Buyer

# Today's Agenda

  
**Real Estate  
Expert**



  
**Lead  
Generation**



  
**Lead  
Follow-up**



  
**Transaction**

Notes:

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# Seven Close-to-Appointment Tactics

Don't leave any conversation without asking for the appointment multiple times! The worst they can do is say no.

## 1. Show the Benefits

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## 2. Take-Back Close

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## 3. Negative-Positive Close

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## 4. Give Them What They're Looking For

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## 5. Trial Close

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## 6. Assumptive close

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## 7. Tie-downs

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# Buyer Objections to the Appointment

## The Five-Step System

1. Ask questions
2. Empathize
3. Identify the real issue
4. Offer a solution
5. Urge an agreement

- Buyer chooses to look on their own

I understand. Here are a few things to consider. It can be a very time-consuming process. With my access to the Multiple Listing Service (MLS) and my real estate contacts, I can search all available properties for you and show you the best ones based on your need, saving you a lot of time and headache.

- Buyer relies on searching online

The reality is that many times homes advertised online may not be available anymore, and how a property appears online is not the same as seeing it in person which you'll need a licensed agent for. Finding a house is the fun part, and we can do that very efficiently based on your expectations and needs. Once you find the house, the hard work of submitting an offer and getting you to the close begins. This is all part of the service and expertise I provide as your fiduciary.



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# Buyer Consultation Preparation Checklist

1. **Confirm appointment day and time** – You will follow up to confirm the appointment and further prequalify by asking any questions you might have missed on the initial call.
2. **Confirm appointment location**– Your first, best, and safest choice is to meet in the office. When you meet your customers in the office, it puts you in the driver’s seat and gives you an opportunity to display your professionalism and the support systems you have at your disposal.
3. **Ensure all decision makers attend** – Make sure all decision makers will be present at the appointment. If your buyer answered with more than their name to the lead sheet question, *“Who all is involved in the purchase decision?”* request that all parties be present at the meeting.
4. **Complete your Buyer Guide** – Have all your buyer materials prepared and printed for when the buyer comes for the appointment. Include your Buyer Agency Representative agreement.
5. **Prepare the meeting space** – Be sure your meeting area is clean and organized and all technology is in working order, whether meeting in-person or virtually via video conference.
6. **Review the lead sheet** – Go over the lead sheet right before the consultation so the buyer’s profile and goal is clear in your mind.

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# Preparing for the Buyer Consultation



## Welcome the Buyer

(Buyer name), thank you for letting me help you. My goal is to give you a 10+ customer experience. To do that, I'd like to get a clear idea of what you are looking for in your new home.

So, with your permission, I'd like to spend the next 20–30 minutes exploring what the right home for you would be like. We'll call this your 10+ home. With your permission, I'd like to write notes as we go along so I remember everything that's important to you.

It may seem like a lot, and I'd rather ask you 500 questions now and show you the right 5 homes.

**Buyer Consultation Affirmation:**  
I am knowledgeable and caring and the best agent for these clients.  
They will appreciate my expertise and preparation and choose me to represent them as they buy their home.

To comply with Fair Housing laws, take the KW courses: The Color of Real Estate, Unconscious Bias, and Agent of Distinction.

Notes:

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# Buyer Needs Analysis

These questions, and more, appear in the Buyer Presentation in Designs in Command.

- What type of home are you looking for (e.g., single-family, condo, town house, etc.)?
- Approximately what square footage would adequately cover your living space?
- How many stories do you prefer?
- What lot size are you looking for?
- What architectural styles are you drawn to?
- What type of exterior siding appeals to you?
- Do you want a porch, deck, or both? What type of home are you looking for (e.g., single-family, condo, town house, etc.)?
- Approximately what square footage would adequately cover your living space?
- How many stories do you prefer?
- What lot size are you looking for?
- What architectural styles are you drawn to?
- What type of exterior siding appeals to you?
- Do you want a porch, deck, or both?
- What are you looking for in terms of a garage [e.g., attached, carport, etc.]?
- What type of driveway or vehicle entrance/exit will you require?
- Do you want a swimming pool or a hot tub?
- Are you looking for any structures such as a greenhouse or shed?
- Do you need special outdoor arrangements for pets? [e.g., a dog run, fenced-in yard, etc.]
- What other exterior features are important to you?
- What style do you envision for the interior of your home? (e.g., formal, casual, cozy, traditional, minimalist, modern, etc.)?
- What kind of floor plan do you prefer (e.g., open vs. walls or divided living spaces)?
- In general, what are your preferences for the interior?
- How many bathrooms do you need?
- What are your needs for each of the bathrooms?
- Will any bathroom need to serve a specific purpose (powder room, swimming pool access, fit for small children, accessibility specifications)?
- How many bedrooms do you need?
- How will each of those rooms be used?
- What are your preferences for the owner's suite?

# Close for Agreement

Ask for an exclusive agreement, called the Buyer Representation Agreement. Check with your Market Center for a copy. Below are sample conversations. Once the buyer agrees, share the Buyer Representation Agreement, explain it, ask them to sign it. and thank them.

## Close for the Buyer Representation Agreement #1

All I ask in exchange for my superior customer service promise is that you agree to work with me exclusively. Does that sound fair? Can we sign and agree on that?

## Close for the Buyer Representation Agreement #2

What we're going to do now is sign the Buyer Representation Agreement which puts me to work for you. You're giving me the tool I need to represent you in your purchase. With this tool, I have the opportunity to negotiate for you and get you the best deal. And getting the best deal is important to you, isn't it?

Perfect, then let's do the right thing, sign the Buyer Representation Agreement, and put me to work for you.

## Close for the Buyer Representation Agreement #3

Can you see how it would benefit you to have a professional looking out for your best interests as you search for the best home and negotiate to get the best deal?

Great! This form allows me to represent you and look out for your best interests. Here's how we take care of that. You just need to okay this agreement right here.

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# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?


How will your behaviors be different going forward? What **ACTIONS** will you take?

What **TOOLS**, models, or systems will you use? How will they make you accountable?

# Daily Success System

















## Success Activities

These are suggested activities for the second half of your session.



### DAILY SUCCESS SYSTEM

- \_\_\_ of 10 CONVERSATIONS
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- APPOINTMENTS
- AGREEMENTS
- CLOSINGS

10					
					
5					
1	 <b>Social Media Engagement</b>				

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# Transaction

**SESSION 15**

## Win the Seller

# Today's Agenda

  
**Real Estate  
Expert**



  
**Lead  
Generation**



  
**Lead  
Follow-up**



  
**Transaction**

Notes:

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# “A” Qualified Sellers

## “A” Qualified Sellers:

Able, ready, and willing to do business in the next 14 days.

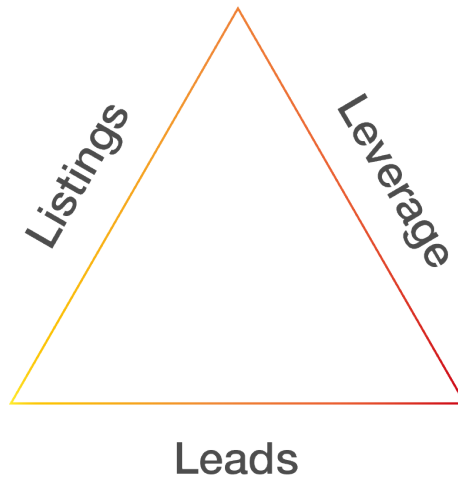
Notes:

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While leads are vital to your sales business, seller listings are critical to your ability to build it to its highest level with the lowest costs and highest net.

**Gary Keller**

*The Millionaire Real Estate Agent*

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# Virtues of Seller Listings

1. Seller listings mean marketing opportunities

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2. You have more control of your time

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3. Seller listings maximize your per-hour compensation

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4. Volume, volume, volume

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5. With seller listings you are on the frontend of pricing

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6. Properly marketed seller listings bring you more business

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# Get the Appointment

## Keys to Converting Your “A” Sellers

1. Respond right away to lead inquiries.

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2. Get valid and complete contact information, save it to Command, and create an Opportunity.

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3. Determine their motivation to sell so you can speak to it.

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4. Set an appointment—time and date—for as soon as possible and send pre-listing packet.

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## What Sellers Want Most from Their Agent

- Help price home competitively **21%**
- Help the seller market their home to potential buyers **20%**
- Help sell the home within a specific timeframe **16%**
- Help the seller find ways to fix up their home to sell it for more **16%**
- Other **27%**

# Build Confidence and Trust

Notes:

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# Seven Close-to-Appointment Tactics

1. Show the benefits
2. Take-back close
3. Negative-positive close
4. Give them what they're looking for
5. Trial close
6. Assumptive close
7. Tie-downs

## Questions vs. Objections

When a question is asked—**answer it.**

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When an objection comes up—**address it.**

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## Pre-Listing Packet Goals

- 1. Pre-sell**—build the sellers confidence, answer their questions and objections before your presentation.

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- 2. Save time**—makes the consultation experience smoother and/or shorter by tackling common obstacles.

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- 3. State your value**—tell the seller what you bring.

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## Pre-Listing Packet Criteria

1. Will you review it in the Listing Presentation?
2. Does it eliminate the need for a listing consultation?
3. Is it a primer for education you will provide at the listing consultation?

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# Build Your Pre-Listing Packet

Some key items for your pre-listing packet might include:

- Cover page
- Contact information
- Promise to the seller
- Selling process overview
- General pricing information
- Value Proposition
- Broker/office/personal metrics
- Client testimonials
- Previous listings
- Ancillary services—Keller Mortgage, Keller Covered, Keller Offers



Notes:

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Pursuant to RESPA, Keller Williams agents/associates must provide an ABA Disclosure to the consumer at or before any referral is made to Keller Mortgage. More information on RESPA and the ABA Disclosure can be found here or at: <http://www.kwconnect.com/page/industry-resource/>.



# Seller Consultation Preparation Checklist

**1. Deliver your pre-listing packet** – On time as promised.

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**2. Confirm appointment date, time, and location** – Be safety conscious.

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**3. Ensure all decision makers attend** – Who is involved in the selling decision?

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**4. Complete and practice your listing presentation** – Prepare early.

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**5. Review the lead sheet** – Know your seller's profile and goals.

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**6. Arrive to the listing presentation in a professional manner** – Make a good impression.

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# Goal: Get a Signed Listing Agreement

1. Create a great impression to build the seller's confidence in you as their real estate agent of choice.

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2. Share your price recommendation—the initial list price for their property—and your reasoning behind it.

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3. Set expectations for how you will market the home and work with sellers.

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# How the Listing Presentation Meets Seller Needs and Wants



1. How does each section address the goals we just discussed? (Create a great impression, share price recommendation, set expectations)

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2. How does each section address the items sellers want from our pie chart?

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3. How might you customize a section or page to further meet these goals and needs?

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# Preparing for the Listing Presentation

**Listing Presentation Affirmation:**

I am knowledgeable and caring and the best agent for these clients.  
They will appreciate my expertise and preparation and choose me to  
represent them as they sell their home.

## Listing Walkthrough

Notes:

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## Listing Agreement

Notes:

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# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?

How will your behaviors be different going forward? What **ACTIONS** will you take?

What **TOOLS**, models, or systems will you use? How will they make you accountable?

# Daily Success System

















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These are suggested activities for the second half of your session.



### DAILY SUCCESS SYSTEM

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# Transaction

**SESSION 16**

## Work with Buyers and Sellers

# Today's Agenda

  
**Real Estate  
Expert**



  
**Lead  
Generation**



  
**Lead  
Follow-up**



  
**Transaction**

Notes:

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# Success with Clients

## Great Agent / Client Communication

1. Provides a strong foundation for a sustaining relationship.
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2. Sets and manages expectations proactively throughout the transaction.
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3. Creates peace of mind for your clients.
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- 

4. Enhances your credibility.
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- 



Virtually every top-producing agent we have ever worked with has a deep and almost inherent sense of service. They have a servant's heart and place their buyer's or seller's real estate experience above all else. They are always thinking service.

*The Millionaire Real Estate Investor*



# The Three Levels of Service

1. Purpose \_\_\_\_\_
2. Value Proposition \_\_\_\_\_
3. Fiduciary \_\_\_\_\_

## Functionary

A specific task relationship with clients. They do the job by dotting the i's and crossing the t's.

- Low Level
- Low Relationship
- Assumes Little Responsibility
- Uses Low Skill
- Records Information
- Responds to Needs
- Processes Data
- Narrow Picture Viewpoint
- Delivers Information
- Other-Directed
- Minimum Legal Responsibility
- Employee
- Does the Task
- Tells and Sells
- Stays out of Decision Making
- Follows Rules and Procedures
- Replaceable
- Minimally Paid

## Fiduciary

A high trust relationship with clients and always puts their best interests at the forefront, even before the agent's own.

- High Level
- High Relationship
- Accepts High Responsibility
- Masters High Skill
- Perceives Information
- Anticipates Needs
- Interprets Data
- Big Picture Viewpoint
- Advises and Consults
- Self-Directed
- Maximum Legal Responsibility
- Partner
- Owns the Result
- Educates and Guides
- Involved in Decision-Making
- Uses Judgment and Intuition
- Irreplaceable
- Highly Paid



# Success with Clients

## 1. Set Expectations

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## 2. Review the Transaction Process Timeline

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## 3. Set Time Expectations

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## 4. Set Document Expectations

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## 5. Set Communications Expectations

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## 6. Set Contingencies

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## 7. Set Up-to-Date Market Expectations

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## 8. Set Tech Expectations

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## Three Steps to Gaining Referrals

- 1. Provide Value**—provide stellar service. Provide education, advice, and care.
- 2. Ask for Help**—let people know that your business is based on referrals. Your conversations book has some great, easy ways to ask for this help.
- 3. Reward**—reward the behavior of referral. Don't wait for closing. Send a card with a gift card for coffee, take them out for coffee, or better yet, send a small gift to their office where not only will they feel appreciated, and others might ask about it!

Notes:

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## Request a Review

If your purchasing or selling experience exceeded your expectations, would you be so kind as to give me a brief review? I'd also like your permission to use this in my advertising and marketing.

Seller Reviews	Buyer Reviews



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# Success with Buyers

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## Showing Homes Best Practices

1. Show only the **best properties** for your buyer—ones that you have thoroughly screened in advance.
2. Have **MLS printouts** (or electronic versions) with the pricing information and key details of each property you will show your buyer, including disclosures .
3. Mark properties on a **map** and answer location questions.
4. Be **knowledgeable** about the property and neighborhoods.
5. Include recent **comparable sales** so you can answer pricing questions.
6. Point out potential **issues / concerns** with each house.

Notes:

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## Home Tour Tool Kit

Paperwork (contract, customer needs, MLS sheets, listing agent contact info)	Graphite for sticky locks
Map	Hand wipes/ hand sanitizer
Sanitizing wipes	Masks
First aid kit	Shoe covers
Flashlight	Business cards
Level	Umbrellas
Tape measure	Beverages and snacks
Office supplies (notepad, pen)	Entertainment for kids
Paper goods (tissues, toilet paper, paper towels)	

## Safety First

Notes:

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## Reasons Buyers Hesitate

Buying a home is a big deal and buyers can experience hesitation and reluctance.

1. They are afraid the commit.
2. They don't like some minor detail of the home.
3. They feel they haven't seen enough homes.
4. They need to sleep on it and/or get the opinion of a trusted advisor.

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## Guidelines to Facilitate Decision Making

Buying a home is a big deal and buyers can experience hesitation and reluctance.

- Go back to their motivation
- Go back to their needs and wants
- Advise them as a consultant and fiduciary
- Allay their fears
- Solve their challenges
- Calculate the cost of waiting




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# Success with Sellers

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## Great Agent / Client Communication

1. Provides a strong foundation for a sustaining relationship.

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2. Sets and manages expectations proactively throughout the transaction.

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3. Creates peace of mind for your clients.

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4. Enhances your credibility.

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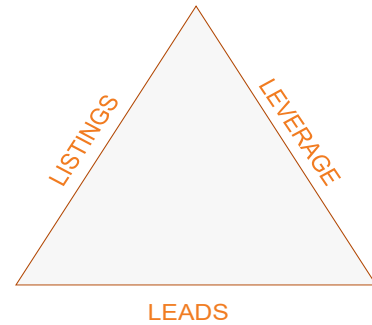






## Leverage Your Listings

Capitalize on your listings by marketing your brand at the same time to bring in more listings and more buyers.



## 14-Step Marketing Plan for Listings

1. Price your home competitively with the current market and price trends.
2. Advise you on how to attract buyers by showing your home in the best possible light.
3. Place “for sale” signage, with property fliers easily accessible to drive-by buyers.
4. Respond to all buyer inquiries immediately.
5. Optimize your home’s Internet presence by posting your property in the Keller Williams Listing System (KWLS), on local and global MLS systems, and on social media, with plenty of photographs and a description of your property.
6. Market your home on multiple websites, including my own site, my KW local office site, and KW national site, to attract both local and out-of-town buyers.
7. Post your home on my proprietary search app and other KW agents’ apps.
8. Create fliers and comment cards for viewers of your property.
9. Distribute “just listed” notices to neighbors, encouraging them to tell family and friends about your home.
10. Target my marketing to active real estate agents who specialize in selling homes in your neighborhood.
11. Include your home in our company and MLS tours, allowing other agents to see your home for themselves.
12. Create an open house schedule, and market and host the open house to promote your property to prospective buyers.
13. Target active buyers and investors in my database who are looking for homes in your price range and area.
14. Provide you with weekly updates detailing my marketing efforts, including comments from the prospective buyers and agents who have visited your home.



The message you put out to attract prospective buyers and sellers is everything. Why would they want to contact you in this market? What would they get if they did? These two questions are at the heart of all effective messaging.

*SHIFT*



## Your MLS Listing Reflects Your Brand

1. Have the right documents for your Region and Market Center uploaded.

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2. Utilize the right professionals to get great pictures and floorplans.

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3. Set the right schedule for your listing.

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## Proper Signage

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# Success with Co-Agents

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**Aha's**

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# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?

How will your behaviors be different going forward? What **ACTIONS** will you take?

What **TOOLS**, models, or systems will you use? How will they make you accountable?

# Daily Success System

















## Success Activities

These are suggested activities for the second half of your session.



### DAILY SUCCESS SYSTEM

- \_\_\_ of 10 CONVERSATIONS
- \_\_\_ of 10 CONTACTS ADDED
- \_\_\_ of 10 HANDWRITTEN NOTES
- 10-5-1 SOCIAL MEDIA ENGAGEMENT
- ENRICHMENTS
- APPOINTMENTS
- AGREEMENTS
- CLOSINGS

10					
					
5					
1	 <b>Social Media Engagement</b>				

WARNING! You must comply with the TCPA and any other federal, state or local laws, including for B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance.









# Transaction

**SESSION 17**

## Make and Receive Offers

# Today's Agenda

  
**Real Estate  
Expert**



  
**Lead  
Generation**



  
**Lead  
Follow-up**



  
**Transaction**

Notes:

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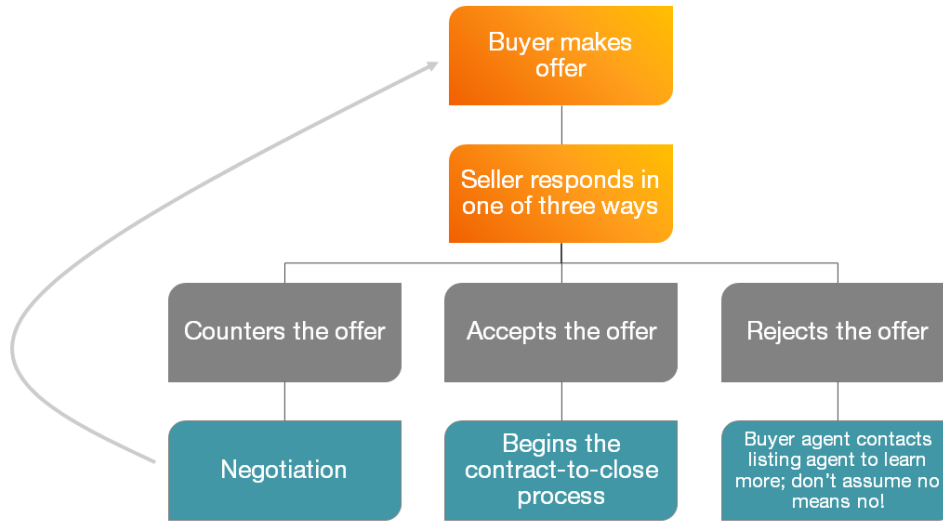


I like to think of sales as the ability to gracefully persuade, not manipulate, a person or persons into a win-win situation.

**Bo Bennett**  
*Author and PhD*



# The Offer Process



Notes:

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 **Aha's**

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# Prepare an Offer Checklist

- 1. Ensure the property is still available**

Even if the MLS indicates the listing is active, contact the listing agent to let them know your client would like to make an offer.
- 2. Build rapport with listing agent**

Gather as much information about the sellers and property as possible.
- 3. Inquire about activity**

Ask about the number of showings
- 4. Inquire about other offers on the property status? Why did they fall through?**
- 5. Ask questions about seller motivations / needs**

Find out their time frame and motivation for moving. This allows you to customize the buyer's offer to address the seller's most pressing needs.
- 6. Ask listing agent how they want to receive the offer. Would they like a single PDF, separate PDFs, to have it submitted via DocuSign, Dotloop or another platform?**

Be sure to check the MLS listing for needed documents FIRST! You don't want to ask for information that has already been provided.
- 7. Obtain the buyer's preapproval from lender**

Your offer is much stronger when accompanied by the pre-approval letter or proof of funds.
- 8. Review MLS and tax records**

Look for information about pricing history and ownership.
- 9. Produce a comparative market analysis**

Use to educate and inform your buyers.
- 10. Obtain a Seller's Disclosure Statement and other needed documents**

Notes:

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# Ask the Right Questions



Pair up with a colleague and talk about things that are important to sellers. If you've been a seller, feel free to share your own experience.

- What questions could you ask the listing agent?

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# Write an Offer Checklist

**1. Price and Terms**

Consult with your buyer to arrive at the most logical offering based on the CMA and items below.

**2. Seller's Disclosure**

Review this disclosure with your client to find out if there are any deal breakers.

**3. Conveyances**

Consider what items in the home will transfer or convey to the buyer. Typically, attached fixtures stay and moveable items go with the seller. In some areas, the Seller's Disclosure Statement will specify which items convey. These items are up for negotiation.

**4. Earnest Money**

The buyer makes a deposit to the seller to show good faith in the transaction. This earnest money is typically deposited in an escrow account that is jointly held on behalf of the buyer and seller. Determine an amount that would be acceptable to both your buyer and the seller. In many markets, 2-3 percent of the purchase price is normal. Check with your Team Leader or Broker to learn how earnest money is handled. Do the same for option money (if applicable). Review with your buyer when and how all checks are written and deposited.

**5. Due diligence / inspection period**

How many days will you need to complete all necessary inspections?

**6. Time for Seller Acceptance**

Be sure to specify a time for acceptance that is in line with norms in your market.

**7. Financing Terms**

Make sure the financing terms are agreeable to your buyer, the seller, and are accurate from the lender.

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## Write an Offer Checklist (cont'd)

### 8. Buyer Preapproval Letter

Include this letter from the buyer's lender when you submit the offer. Often you will want to ask for a letter specific to the property and price you will be offering so be sure to ask for this early. While talking with the lender you will also want to know the limits of their pre-approval and loan terms that will affect your requests for closing costs/repair limits and timelines.

### 9. Closing Date

Check with your Broker and the lender for the average time to close the loan. Make sure that the closing date will work for your buyer, their lender, and the closing company. Tuesdays, Wednesdays and Thursdays are the best days to close because they are in the middle of the week; therefore, you have an extra business day before or after if needed to complete the transaction.

### 10. Home Warranty

Review any home warranty considerations.

### 11. Repair Limits

If applicable in your area at this point in the process, focus on the items the buyer is most interested in repairing. Bear in mind the law/lending regulations place limits on how much money the seller can give to the buyer. Be sure the buyer understands these limits and advise further consultation with their lender if needed.

### 12. Special Clauses or Contingencies

These are special conditions that must be met for the contract to close, such as a satisfactory inspection report, appraisal, the sale of the buyer's current home, or the buyer obtaining financing. Carefully write any special clauses or contingencies the buyer would like to include in the offer.

### 13. Addendums

Be sure to include all addendums required by your market, seller or market center. Often these will be in the MLS with the listing.

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# Email Summary for Listing Agent

## Email Sample for Buyer X Offer on 123 Main Street

Hello, this is \_\_(your name)\_\_\_! Thanks for the communication thus far.

Below is the offer summary and the list of attached documents on behalf of my Buyers, Buyer X and Buyer Y.

### **OFFER SUMMARY:**

- Buyers: Buyer X and Buyer Y
- Sales Price: \_\_\$359,000.00\_\_
- Closing: 30 days
- Financing: 20% FHA (already confirmed that condo classification on title will not be a problem)
- Pre-approval: Keller Mortgage (attached)
- Other: Buyer to contribute \$5,300 toward 2nd & 3rd lien

### **ATTACHED:**

- Contract/ offer
- Pre-approval letter
- Proof of funds \$95,000.00
- Signed property disclosure
- Signed lead-based paint disclosure

Will send copy of deposit tomorrow. We look forward to hearing back. Thanks so much. Feel free to call, text, or email me for anything. I look forward to working with you.

Buyer's Agent



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# Receive and Review the Offer Checklist

- 1. Check to be sure the offer is complete and contains all necessary addendums. If not, contact the buyer's agent and ask for missing information.
- 2. Confirm receipt of the offer with the buyer's agent. Remember, you are building rapport with your possible co-agent on this deal and colleague for the rest of your career. Don't leave them wondering and with nothing to tell their client.
- 3. Get the offer to the seller in a timely manner. Ask your broker or coach what timely means in our market.
  - a. If needed, mark the offer as received and/or sent to seller.
  - b. If timely is immediately, email the offer to your clients and tell them you will follow up with an executive summary.
- 4. Create an executive summary and send it on to your client. Attach the offer again even if you sent it immediately. Set a time for you to reach out to them where you will both have the offer open and ready. Be sure everyone will be looking at it on a larger screen (not a phone) in a distraction-free environment.
- 5. Call the buyer's agent to gather more information about the transaction. Remember, you are not asking about the personal characteristics of the buyer but gauging the strength of the offer by focusing on their willingness and ability to buy.
  - a. Introduce yourself and thank the agent for their offer.
  - b. How long have the buyers been looking?
  - c. Have the buyers been pre-approved by a lender and for what type of loan (if no pre-approval is attached).
  - d. Do the buyers have a home to sell?
  - e. Why did the buyers select this property?
  - f. Have the buyers seen the home personally or are they offering sight unseen?
  - g. How did the buyers determine their offer price?
  - h. Have the buyers made offers on other properties? If so, what happened in those negotiations?
  - i. Have you worked with the buyer's lender before?
  - j. What should I know about your buyer?



## Receive and Review the Offer (cont.)

- 6. (If allowed in your area) Call the lender to verify the pre-approval letter.
  - a. Introduce yourself to the lender.
  - b. Have income, assets, and credit been verified?
  - c. Have income, assets, and credit been pre-approved by an underwriter?
  - d. Are there any non-property related conditions to the loan approval?
  - e. What are your appraisal turnover times currently?
  - f. They have a settlement date in the contract. Can you confirm you can meet that date?
  - g. Is this loan contingent on a home sale?
  - h. Have you worked with this buyer's agent before?
  - i. Have you worked with this buyer before?
  - j. Are you aware that the buyer has given an appraisal gap of \$\_\_\_\_\_ ? Can you confirm they have the cash to cover this amount in addition to down payment, closing costs, and all other expenses?
  
- 7. When you speak to your sellers, have an outline of the important items from the contract and what you've learned from your conversations with the lender and buyer's agent.
  - a. Contract terms and deadlines
  - b. Estimate of net proceeds
  - c. Pros and cons of the offer as you see them
  - d. Options to respond to the contract
    - Accept
    - Reject
    - Counter - Be sure they understand that a counter is a rejection of the original offer

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# Executive Seller Summary

## Email Sample for Seller Prior to Presenting the Offer

***CONGRATULATIONS!!! We just received an offer on your property at 6405 N 1st Lane***

- The offer is for \$225,000.00 with conventional financing.
- Buyer will deposit \$2,500.00 with **(name of title company)**.
- Seller to pay for Title Policy.
- Buyer is requesting an existing survey within 21 days. If the existing survey is not acceptable by the title company, buyer shall obtain a new survey at Buyer's expense no later than 3 days prior to closing date.
- Buyer accepts property as is.
- Seller to pay \$525 for a one-year home warranty.
- Closing on or before 10/2/2020
- Seller to contribute \$0.00 towards buyer's closing costs
- Buyer will put \$100.00 for a 10-day option period.
- Refrigerator, Stove, Dishwasher to convey with the sale

At the \$225,000.00 sales price, with all the above terms, your estimated net proceeds would be \$211,500.00 (this amount DOES NOT include any taxes that may be owed, any proration of taxes for the current year, or any mortgage payoffs).

Let's set a time to talk as soon as possible. You'll want to have the offer pulled up on your computer, preferably not your phone, and be somewhere we can talk without distractions. Looking forward to talking it through!

Congratulations again,

Listing Agent

Notes:

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# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?

How will your behaviors be different going forward? What **ACTIONS** will you take?

What **TOOLS**, models, or systems will you use? How will they make you accountable?



# Daily Success System

















## Success Activities

These are suggested activities for the second half of your session.



### DAILY SUCCESS SYSTEM

- \_\_\_ of 10 CONVERSATIONS
- \_\_\_ of 10 CONTACTS ADDED
- \_\_\_ of 10 HANDWRITTEN NOTES
- 10-5-1 SOCIAL MEDIA ENGAGEMENT
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- CLOSINGS

10					
					
5					
1	 <b>Social Media Engagement</b>				

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# Conversation Sheet

Get your phone and the list of contacts you prepared for this session. You may also have a few referral names to connect with.

Use the conversation starters provided to you in earlier sessions.

1. Call for 20 minutes and make contact with as many people as possible.
2. Ask for business, that is, an appointment, if it's a strong lead.
3. Ask for referrals from each contact.
4. Offer your KW App to each contact.

Record your results below and share them at the end of the conversation.

Name	#	Email	Notes

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# Transaction

**SESSION 18**

## Negotiate Offers

# Today's Agenda

  
**Real Estate  
Expert**



  
**Lead  
Generation**



  
**Lead  
Follow-up**



  
**Transaction**

Notes:

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Negotiating is not something to be avoided or feared—it's an everyday part of life.

**Leigh Steinberg**  
*Sports Agent and Author*

# What is Negotiation?

You negotiate with:

1. Your clients
2. The agent on the other side of the transaction

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## The Common Points of Negotiation

- 1** | **Price**
- Usually the primary factor
  - The cost of the property

- 2** | **Terms**
- Either financial, time-based, or both

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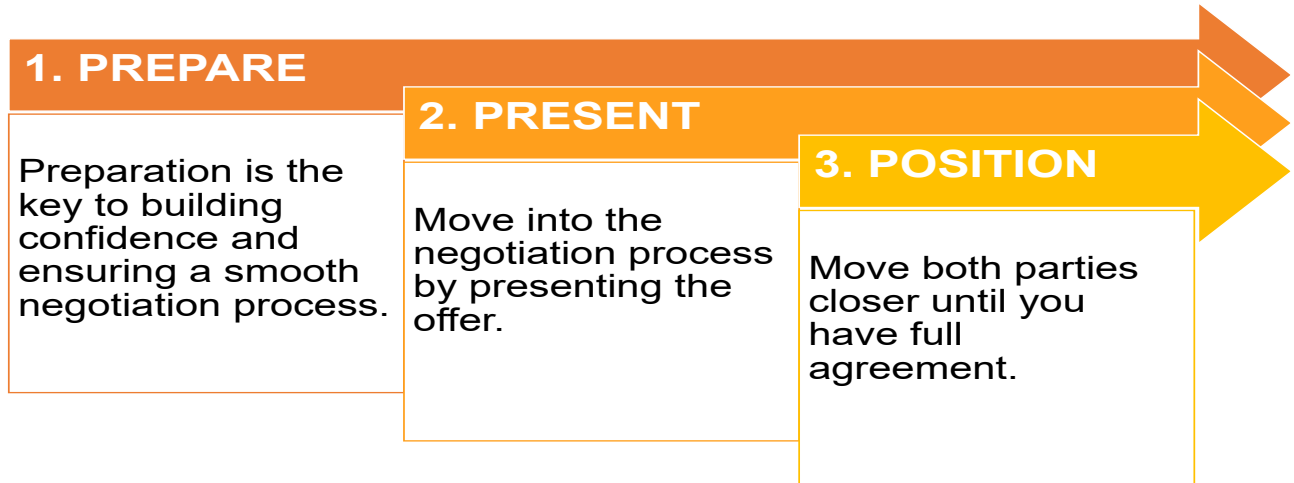
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# The 3Ps Approach



## 1. Prepare

1. Know your goal
2. Know your client
3. Think ahead
4. Set clear expectations
5. Be informed
6. Obey the laws
7. Know the documents inside and out

Notes:

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# Ask Purposeful Questions



Provides you with the **points** you will negotiate on



Allows you to get to know your client and their **goal**



Provides **insight** on where you and your client will have leverage



Helps you learn what will make it a **win-win** negotiation for both parties



Sets clear **expectations**

## Open-Ended Questions

Questions that have unlimited response options.

- What additional information should I know?
- What is important about closing in 30 days?
- How do you feel about that?

## Closed-Ended Questions

Questions that expect a specific response, often yes, no, or one word.

- Do you have to sell your home by a specific date?
- Do you have any other offers?
- What is the bottom-line price you would consider?

What would happen if...

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Why is this important to you?

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## Take Action



Read the scenario below. Circle or underline the key areas in which you need more information or certainty before you could confidently negotiate on your client's behalf. Write three specific questions you would ask your client in the space provided below.

### Scenario

You are representing a single buyer. Your client is renting her present property. Like any first-time buyer, she is looking to you to guide her through the process. The asking price for the home she really loves is \$175,000. The house appears to have evidence of a roof leak, is listed “as is,” and is correctly priced. Your client would like to keep her payments as low as possible since she still has a number of student loans to pay off. She wants to write an offer for \$155,000. There has been quite a bit of activity on the listing.

### Clarifying questions to ask the client:

1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



## 2. Present

1. Call the other agent
2. Pay attention to non-verbal cues like pauses and voice qualities
3. Keep quiet once you present an offer
4. Listen carefully to what is important to the other party
5. Stay calm and relaxed
6. Focus on the customer's needs
7. Give your offer the best chance

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## 3. Position

1. Acknowledge and affirm common ground
2. Ask “what” and “how” questions
3. Know that positioning is a process
4. Know when to walk away



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# Take Action



Choose a partner and select who will play the part of the buyer agent and who will play the part of the listing agent. Review your role below. Using what you have learned in the course and using the supporting materials, take 1-2 minutes to prepare for a negotiation. Present your case to your partner and practice positioning. Go back and forth 2 times with the goal of a win-win agreement.

## Scenario

The property has 4 bedrooms, 3.5 baths, and is listed at \$350,000 in a well-established neighborhood. The house requires new carpeting throughout the first floor and a new garage door opener. Three offers have been made, but all were below the asking price.

## Buyer Agent Role

Your buyers are making an offer of \$340,000 for the house. They have been preapproved. The buyers would like to close in the shortest time possible since they are moving from out of state and need a home for their family. Since they are leaving their appliances in their current home, the buyers would also like all of the appliances to be included.

## Listing Agent Role

Your sellers have raised their family in the house you are selling and have many friends and family in the area. Since their children are now grown, they no longer need the amount of space their current home provides and have purchased a home in Florida. They would like to give all appliances to their daughter, who has just gone through a divorce. They will not be moving until they have sold their current house, and although they would like to get to Florida as soon as possible, they are ready to stand their ground regarding the price.

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# Negotiation Tips

1. Be professional
2. Keep your goal in mind
3. Pay attention to your communication and tone with anyone involved in the transaction.
4. Continually refer to your client's motivation when speaking with them.
5. Don't reveal too much. Listen more than talk. Keep your client's motivation close to your chest.
6. Don't be attached to the outcome.

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 **Aha's**

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# Turn Aha's into Achievement

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# Transaction

## **SESSION 19**

# Get to the Close

# Today's Agenda

  
Real Estate  
Expert



  
Lead  
Generation



  
Lead  
Follow-up



  
Transaction

Notes:

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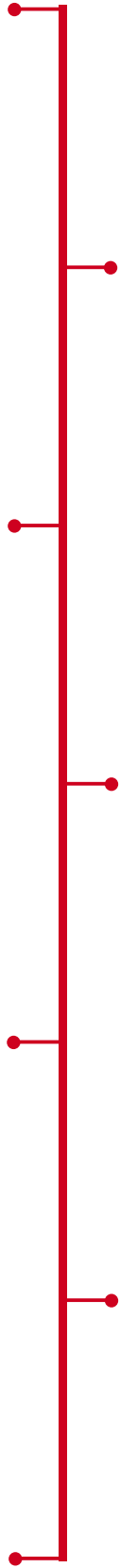
Real estate transactions aren't particularly trouble free ... it's a strenuous and trying time that requires all the attention and effort you can command.

**Gary Keller**  
*The Millionaire Real Estate Agent*





# Timelines



## Closing

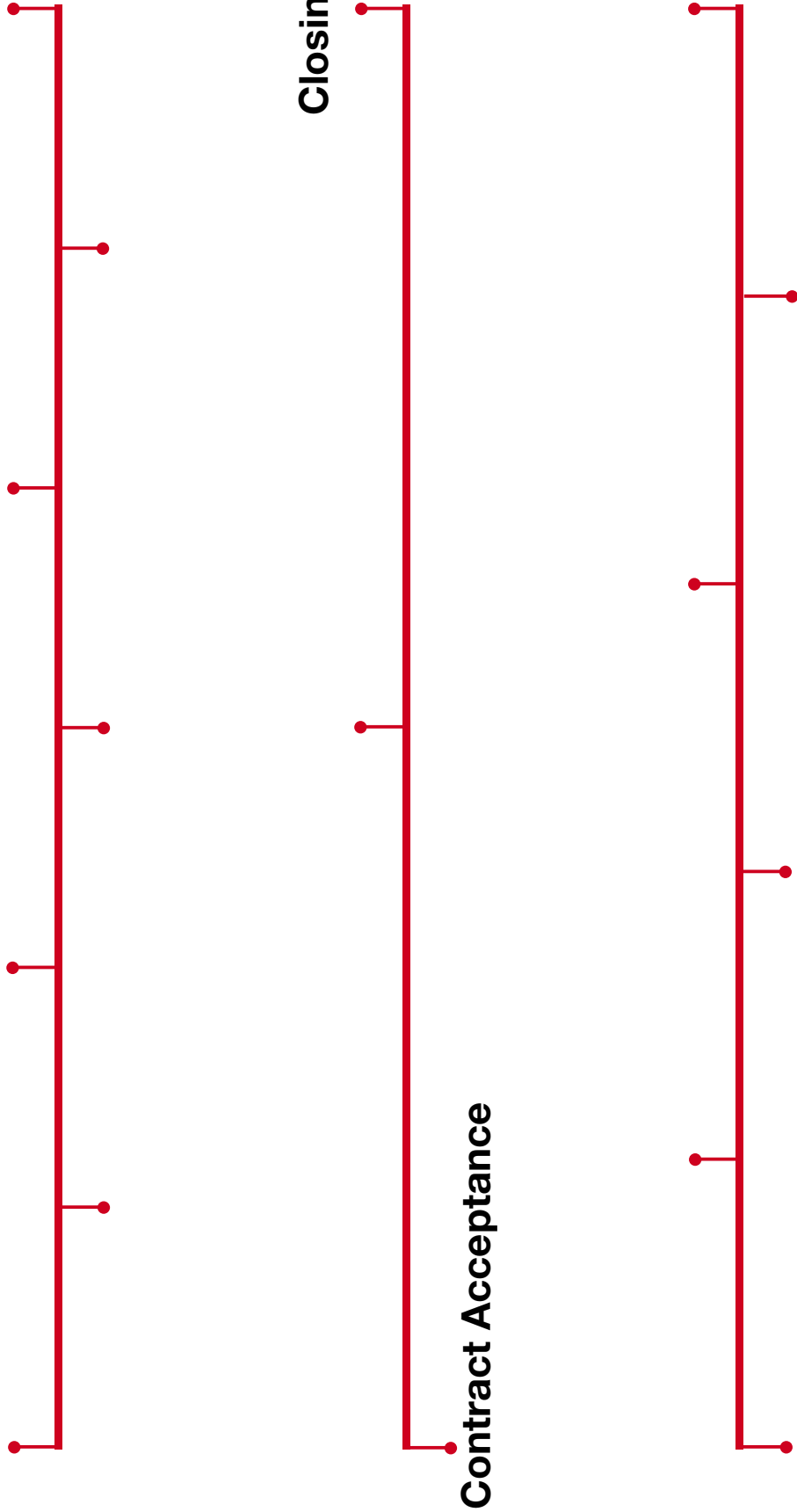


## Contract Acceptance





# Timelines







## Interaction, Communication, Documentation

### Common interaction points:

- Communication of deadlines
- Communication of contract to other parties such as title and lending
- Lender and buyer communication
- Communication of a list or lists of recommended title companies, inspectors, and insurance agents, etc.
- Scheduling and communication with inspectors and listing agent
- Sending amendments or inspection reports to other side, title, and lending

### Additional questions to ask yourself about buyers:

- When am I reminding the buyers to not make big purchases?
- When am I communicating when to set up utilities and how to do it?
- Am I communicating notice of any holidays that may delay the process?
- How do I negotiate the inspection report and when am I communicating this information?
- When do I touch base with the lender, title company, or listing agent?

### Documentation points:

- Is this an act of communication or a document?
- To whom and from whom is the document going?
- What is the best pathway for communicating/sending the document to the responsible party (email, phone, text, DocuSign)?
- What is the plan for follow up after a document has been sent to the responsible party?
- Are there templates for this that I can use or create to save effort and streamline communication across transactions?



# Risk Avoidance

- 1** Communicate clearly and often with everyone involved in that step of the transaction.
- 2** Set expectations upfront.
- 3** Maintain your professionalism throughout.

Be the Fiduciary.  
Always act in your client's best interest.  
Live the **WI4C2TES**.

Where is the deal at risk of falling apart?

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What are the best practices to keep the deal alive?

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**Aha's**

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# Repeat and Referral Business

Repeat  
Business



Referral  
Business



Client  
Reviews



## Ask for Referrals

- At every conversation
- Throughout the transaction
- At the close

My business relies on referrals. If you know anyone that is looking to buy or sell, I'd be so grateful if you could let me know.

I would appreciate the opportunity to help your friends and family members buy or sell their homes.

I intend to build a relationship of trust between us so that when you think of real estate, you think of me.

If you wouldn't mind, please tag me on social media any time one of your friends posts about needing a real estate agent.

I am going to offer you an amazing service for you to refer me to your friends and family. If you don't, I'm going to feel I did something wrong and would need to talk to you about it to do better.



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# Post-Close Follow-Up

## Ideas for Buyer Follow-up

Think items of value.

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## Ideas for Seller Follow-up

Think items of value.

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Notes:

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# Co-Agent Follow-Up

Benefits of continuing and strengthening relationships with co-agents

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Ideas for Co-Agent Follow-up

Think items of value.

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 **Aha's**

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# Turn Aha's into Achievement

How has your **THINKING** changed?

What do you **FEEL** differently about? What was meaningful for you today?

How will your behaviors be different going forward? What **ACTIONS** will you take?

What **TOOLS**, models, or systems will you use? How will they make you accountable?

# Daily Success System

















## Success Activities

These are suggested activities for the second half of your session.



### DAILY SUCCESS SYSTEM

- \_\_\_ of 10 CONVERSATIONS
- \_\_\_ of 10 CONTACTS ADDED
- \_\_\_ of 10 HANDWRITTEN NOTES
- 10-5-1 SOCIAL MEDIA ENGAGEMENT
- ENRICHMENTS
- APPOINTMENTS
- AGREEMENTS
- CLOSINGS

10					
					
5					
1	 <b>Social Media Engagement</b>				

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# Conversation Sheet

Get your phone and the list of contacts you prepared for this session. You may also have a few referral names to connect with.

Use the conversation starters provided to you in earlier sessions.

1. Call for 20 minutes and make contact with as many people as possible.
2. Ask for business, that is, an appointment, if it's a strong lead.
3. Ask for referrals from each contact.
4. Offer your KW App to each contact.

Record your results below and share them at the end of the conversation.

Name	#	Email	Notes

**WARNING!** You must comply with the TCPA and any other federal, state or local laws, including for B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance.



# Transaction

**SESSION 20**

**Plan Your Future**



# Set Your Sights on a Big Future



How you think matters. How you think in the beginning *really* matters!

**Gary Keller**  
*The Millionaire Real Estate Agent*

## Mindset Matters

- What's your mindset?

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- Are you aligned with your heart?

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- Are you ready to take action to have a successful day?

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Notes:

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## Revisit Your Value Proposition

- Does my Value Proposition truly reflect who I am, the value I bring, and the benefit my clients will experience working with me?

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- Am I confident sharing my Value Proposition with my contacts? If not, how can I make it easier to express my value?

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**My Value Proposition**

## Revisit Your Big Life

Is there anything you would change after four weeks? Are you thinking big enough?

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# Your Big Why



... one thing all high achievers have in common is they are working for a Big Why. The Big Why is about having a purpose, a mission, or a need that in turn gives you focus.

*The Millionaire Real Estate Agent*

1. What topics or causes are most important to you?

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2. What gives you energy and fuels you personally?

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3. What is something you would do even if you were not paid?

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4. What do you envision for yourself and your future?

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**My Big Why**

# Have a Smart Money Business



How you think matters. How you think in the beginning *really* matters!

**Gary Keller**  
*The Millionaire Real Estate Agent*

## Mindset Matters

- What's your mindset?

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- Are you aligned with your heart?

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- Are you ready to take action to have a successful day?

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Notes:

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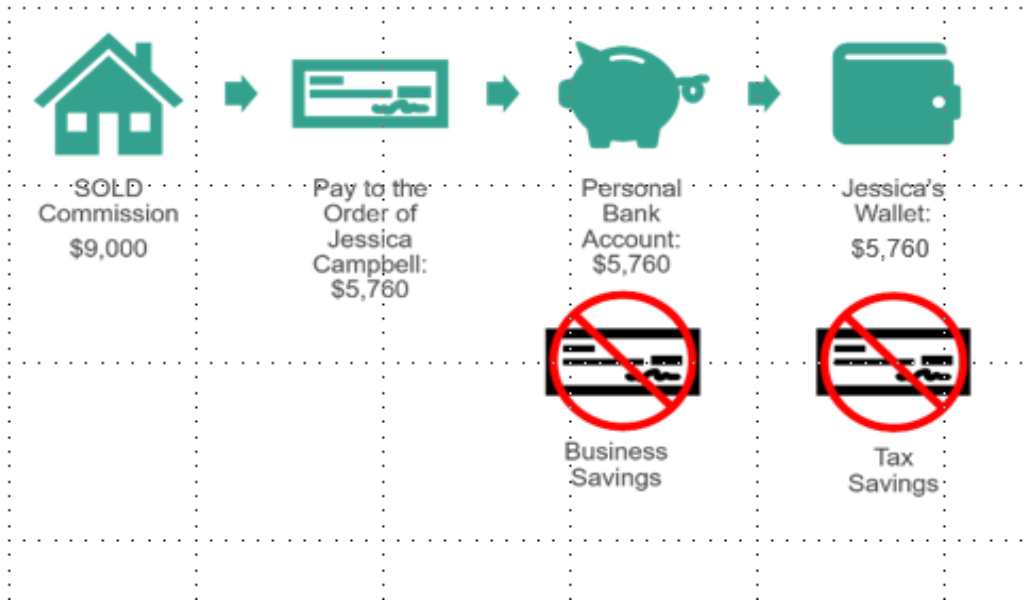
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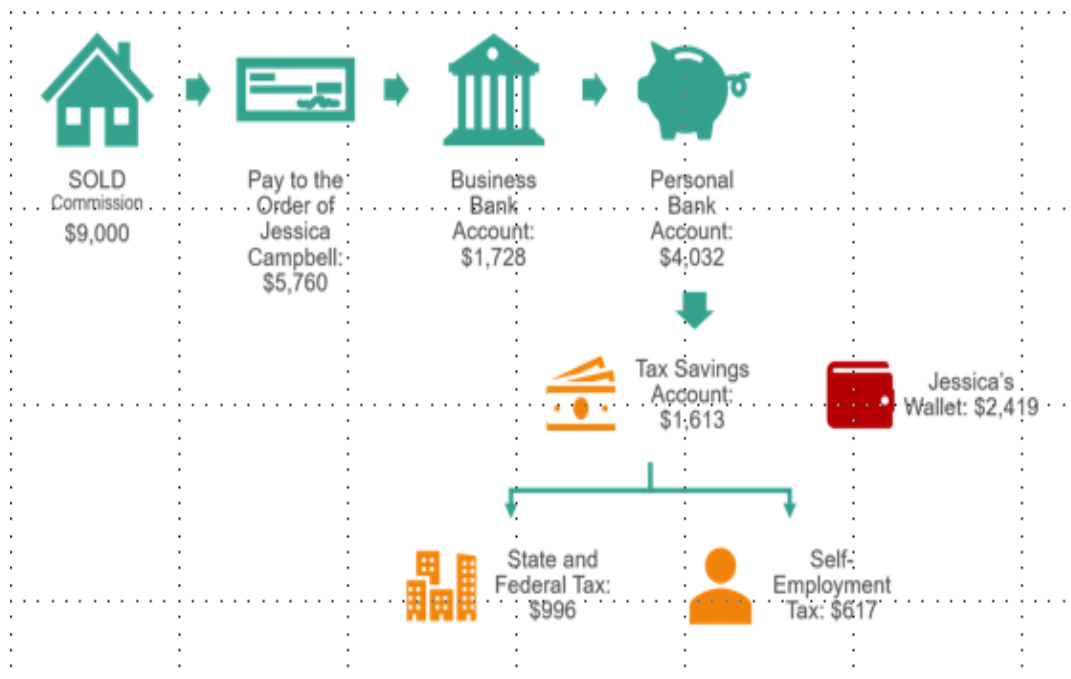
# Have a Smart Money Business



## Scenario 1



## Scenario 2





# Financially Sound or Unsound?



1. Is the \$9,000 commission Jessica receives profit or income/revenue?

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2. Why is Jessica getting a check for \$5,760 for a commission of \$9,000?

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3. Which scenario is financially sound?

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4. What makes it financially sound?

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Notes:

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Money is good for the good it can do.

**Gary Keller**

# The Flow of Money

**Profit:** How much money do I want in my bank account at the end of the year?

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**Income:** How many homes do I need to sell to achieve my profit goal?

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**Expenses:** How can I minimize my expenses to maximize my net income?

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## Best Practices for a Smart Money Business

- Gain clarity on your Big Why and plans for your future
- Set your personal and business budgets
- Set up your business entity
- Open additional bank accounts for taxes, expenses, and other savings
- Download and use the MREA Chart of Accounts
- Purchase/Download tax accounting software
- Hire an accountant, CPA, attorney, tax adviser
- Set dates to calculate and pay your estimated taxes
- Prepare for your future: insurance, savings, investments



Think and act the wage you want before you earn it. Average is as average does. Good is as good does. And great is as great does. What you do is who you become.

*SHIFT*





# Commit to the Success System

Action	WINS What went well	OPPORTUNITIES What could be improved
	What did you have in place to help you accomplish your Daily Success System?  How will you keep this in place?	What challenges prevented you from completing your Daily Success System?  How will you address these opportunities?
Working with Accountability Partner		
Having 10 conversations a day		
Adding 10 contacts to database		
Adding 10 contacts to database		
Lead generating through social media		
Adding enrichments to daily learning		
Setting appointments		
Getting signed agreements		
Closing deals		
Other		

# Accountability

1. Keeps your mindset focused and positive
2. Reminds you of your Big Why
3. Challenges you and makes you uncomfortable at times
4. Is one of our Six Personal Perspectives – Be Accountable

## People

- Accountability Partner
- Productivity Coach
- Mentor
- KW MAPS Coach

## Tools

- 4-1-1
- Time blocking
- The ONE Thing

What type of accountability will you choose going forward?

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## Aha's

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# Plan for Learning

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|--|--|
| <ul style="list-style-type: none"> <li>• Learn More About Your Market                     <ul style="list-style-type: none"> <li>• Preview homes, tour neighborhoods, understand amenities</li> <li>• Days on market</li> <li>• New construction</li> <li>• Codes</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>• Attend Events                     <ul style="list-style-type: none"> <li>• Family Reunion</li> <li>• Mega Agent Camp</li> </ul> </li> <li>• Read                     <ul style="list-style-type: none"> <li>• <i>The Millionaire Real Estate Agent</i></li> <li>• <i>SHIFT</i></li> <li>• <i>The ONE Thing</i></li> </ul> </li> </ul> |
|--|--|

## KW Courses

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>☐ Mindset and Accountability                     <ul style="list-style-type: none"> <li>☐ Six Personal Perspectives</li> <li>☐ BOLD \$</li> <li>☐ Quantum Leap</li> </ul> </li> <li>☐ Command                     <ul style="list-style-type: none"> <li>☐ Command Your Business (online)</li> </ul> </li> <li>☐ Smart Finances                     <ul style="list-style-type: none"> <li>☐ Profitability – Agent Financials</li> <li>☐ Business Planning Clinic</li> </ul> </li> <li>☐ Hiring                     <ul style="list-style-type: none"> <li>☐ Career Visioning</li> </ul> </li> </ul> | <ul style="list-style-type: none"> <li>☐ Sales Skills                     <ul style="list-style-type: none"> <li>☐ Connect Live videos (online)</li> <li>☐ No Ceilings – Level Up Your Lead Generation (online)</li> <li>☐ Train the Presenter \$</li> <li>☐ Customer Experience</li> <li>☐ Win-Win Negotiations</li> </ul> </li> <li>☐ DEI                     <ul style="list-style-type: none"> <li>☐ The Color of Real Estate</li> <li>☐ Unconscious Bias</li> <li>☐ Agent of Distinction \$ (online)</li> </ul> </li> </ul> |
|---|--|

## My Learning Plan

<b>JAN</b>	<b>FEB</b> Family Reunion	<b>MAR</b>	<b>APR</b>
<b>MAY</b>	<b>JUN</b>	<b>JULY</b>	<b>AUG</b> Mega Agent Camp
<b>SEP</b>	<b>OCT</b>	<b>NOV</b>	<b>DEC</b>



# Design Your Future

Future Plan: Next 12 Months	
<b>Big Why</b> My purpose, mission, or need that keeps me focused	
<b>Value Proposition</b> My commitment to my clients	
<b>Profit Goal</b> My intended Net Income to fund by Big Why	
<b>Number of Transactions</b> My goal to attain my Net Income	
<b>Smart Database</b> My goal for the number of contacts in my database and plans for touches	
<b>Smart Money Business</b> How I will manage my finances, keep expenses low, and save and pay for taxes	
<b>Learning</b> My plan for continued lifelong learning and improvement	
<b>Accountability</b> How I will remain accountable to my Future Plan	



Get real about your situation and get right about what you're doing. Bring a greater sense of clarity, priority, and focus to your work.

*SHIFT*



## Final Aha's

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# Turn Aha's into Achievement

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***APPENDIX***

**Conversations to  
Spark Your Career**

## Notices

### General

While Keller Williams Realty, Inc. (KWRI) has carefully prepared all course materials, we do not guarantee their accuracy or make any express or implied warranties about the information. KWRI may change the material at any time without notice.

This course may contain hypothetical examples and exercises meant to illustrate aspects of Keller Williams' financial, growth and investment models, including:

- calculation of profit share contributions and distributions;
- calculation of agent compensation;
- evaluation of a Market Center's financial results;
- agent productivity strategies; and
- estimates of return on investment.

These materials and examples are provided for informational purposes only; they are not a guarantee or prediction of performance, sales, or profits. Agent productivity strategies are models only, not requirements. Independent contractors should set their own goals and strategies. You should not (1) assume that the results of these exercises and models predict your or a Keller Williams Market Center's financial performance, or (2) consider or rely on the results of the exercises and models in deciding whether to make any investment. You should consult your own legal or financial advisor and verify all information to your satisfaction.

### Telemarketing

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## WARNING!

### Do Not Call / Telephone Consumer Protection Act

The Telephone Consumer Protection Act (TCPA) regulates calls and texts to cell phones and landlines, auto-dialed calls, prerecorded calls, faxes, and calls to numbers on the Do Not Call (DNC) Registry. Class-action litigation for TCPA violations is increasing, potentially exposing agents, market centers and KWRI to catastrophic financial damages. Consult an attorney for guidance on the TCPA and DNC laws, including consent requirements, autodialer restrictions and prerecorded messages.

#### TCPA

##### **Auto Dialers**

The TCPA regulates calls and texts to a cellphone using an automatic telephone dialing system (autodialer).

##### **Prior Express Written Consent/ Written Consent**

In certain cases, a caller must have prior express consent before making a call. In other cases, prior express written consent is required.

##### **Artificial Voice / Prerecorded Message**

Never use artificial voice or prerecorded messages without a consumer's prior express written consent. Penalties can cost up to \$1,500 per violation.

##### **Federal and State Laws**

Several states have their own laws governing telemarketing. Talk with your broker about any local and market center rules and DNC lists.

#### DO NOT CALL DO'S AND DON'TS

Under federal law, sellers and telemarketers may not call individuals listed on the Federal Trade Commission's Do Not Call (DNC) Registry. Failure to comply with DNC laws could result in substantial government fines and/or civil legal actions. Consult an attorney regarding compliance with DNC laws.

##### **Subscribe to the Registry**

The DNC registry is hosted on a dedicated website. Your market center should subscribe to the Registry and give you login credentials. Making any telemarketing calls without access to the Registry violates federal law.

##### **Honor Do Not Call Requests**

Never call a number on the Do Not Call Registry. Honor an individual's request to be added to your internal DNC list.

##### **Check Before You Call**

Before making a call, check to see if the number is on any of these lists: 1) National Do Not Call Registry; 2) state Do Not Call list; and 3) market center and agent list. If the number is on any of these lists, delete it.

##### **Limited Exceptions**

Penalties for a DNC violation total up to \$43,280 per call. Fines for violating a state DNC rule can vary from \$100 to \$25,000.

For more information, visit <http://www.kwconnect.com/page/industry-resource/dnc>



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- New to Keller Williams Conversation (C.5)
- Introducing and Identifying Yourself as an Agent (C.6)
- Inventory Conversation Starter (C.6)
- Remind Them You're in Real Estate (C.7)

## Lead Generation

- Conversations With Referrals (C.8)
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- Creating Referral Partnerships With Business Owners You Have Not Done Business With (C.9)
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- Staging Objections Conversations (C.24)
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# Real Estate Expert Conversations

## New to Real Estate Conversation Starter

Hello, this is **(your name)**! How've you been?

### *F.O.R.D. Options:*

F: How's the **(family)**?

O: Are you still working at **(occupation)**?

R: Are you still enjoying **(recreation)**?

D: Did you ever pursue that **(dream)**?

I'm reaching out to share that I am now a real estate agent with **(Market Center Name)**. I thought of you because I knew you would be someone to help me grow my business. Especially since you know my track record and commitment to doing the very best.

I'd like to share my free real estate app with you. It's so easy to check what's for sale and for what price on your street, in your neighborhood, or any place in the US and Canada. I can send you a text with a link, does that sound good?

I'd also like to offer a real estate update on your neighborhood. You can also add additional neighborhoods you may be interested in, and even customize how often you receive the update. All I need is your current address and email and you'll start receiving it right away. Do you mind sharing this information with me? Thanks!

I am building my business with people I know and the people they know. Do you know of anyone from work, your neighborhood, or a group you belong to who's thinking of buying or selling a home, or investing in real estate? I'd be pleased to be a resource for them.

### *If referral given:*

Would you mind sharing their name and phone number or email so I can contact them? Thank you. If you think of anyone else I can help, just call or send me a text. Do you have my number? Please keep me in mind for all real estate needs.

### *If no referral given:*

Thanks for taking a moment to think about it. If you think of anyone, please give me a call or send me a text. Do you have my number? Please keep me in mind for all real estate needs.

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# Real Estate Expert Conversations

## New to Keller Williams Conversation Starter

Hello, this is **(your name)**! Do you have a moment? How've you been?

### *F.O.R.D. Options:*

F: How's the **(family)**?

O: Are you still working at **(occupation)**?

R: Are you still enjoying **(recreation)**?

D: Did you ever pursue that **(dream)**?

I'd like to share some exciting news with you. I've moved my real estate business over to **(Market Center Name)** and though my company name has changed, the level of service I offer clients hasn't. My clients will continue to get all my enthusiasm and hard work. And as you already know, I'll do whatever it takes to help people. May I count on you to help me grow my business?

I'd like to share my free real estate app with you. It's so easy to check what's for sale and for what price on your street, in your neighborhood, or any place in the US and Canada. I can send you a text with a link, does that sound good?

I'd also like to offer a real estate update on your neighborhood. All I need is your current address and email and you'll start receiving it right away. You can also add additional neighborhoods you are interested in. Is there another neighborhood you would like to know about? Do you mind sharing this information with me? Thanks!

I am building my business with people I know and the people they know. Do you know of anyone from work, your neighborhood, or a group you belong to who's thinking of buying or selling a home, or investing in real estate? I'd be pleased to be a resource for them.

### *If referral given:*

Would you mind sharing their name and phone number or email so I can contact them?

Thank you for your time and help, and please let me know if there is anything I can ever do for you. Let me know how you like my search app and the neighborhood updates.

### *If no referral given:*

If you do hear of someone with a real estate need, will you keep me in mind? Great. Let me know how you like my search app and the neighborhood updates.

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# Real Estate Expert Conversations

## **ALWAYS Introduce and Identify Yourself as an Agent**

It's important to practice introducing yourself appropriately in every conversation with your team name and Market Center name.

This is **(your name)** with **(team name)** at **(Market Center name)**.

Though you will not want to use this introduction for conversations with your close family and friends, you want to be sure people know you are an agent with your particular team (if applicable) and Market Center. It is important that you do not introduce yourself as simply with "Keller Williams," because each office is independently owned and operated.

## Inventory Conversation Starter

As an agent, you must always know your numbers and share them in conversations where appropriate. Here's an example.

Real estate markets are always about supply and demand. Did you know that **(#)** homes are listed for sale? That number has (increased/ decreased) by **(%)** in the past month and **(%)** in the last year.

Rising inventory means there are more homes for buyers to choose from so they can more easily demand the price they want. Declining inventory means buyers have fewer choices and sellers can be more demanding on price.

Properties that sold this past month were on the market an average of **(#)** days. That's a change of **(%)** (increase/decrease) from last month and a change of **(%)** (increase/decrease) from the same month last year.

Longer selling times mean prices are likely to be declining. Shorter selling times mean prices are likely to be rising.

**TIP:** As you review MLS data, you'll want to pay attention to segments of the market where the most sales are happening. Is it in a certain geographic area or areas? Is it within a certain price range?

Initially, it's always a good idea to focus on generating leads where the action is.

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# Real Estate Expert Conversations

## Remind Them You're in Real Estate Conversation Starter

Hello, this is **(your name)**! Do you have a moment? It's been awhile and I'd like to apologize for not staying in touch. How've you been?

### *F.O.R.D. Options*

F: How's the **(family)**?

O: Are you still working at **(occupation)**?

R: Are you still enjoying **(recreation)**?

D: Did you ever pursue that **(dream)**?

I've been busy growing my real estate business with **(Market Center Name)** and working with great clients like you. I wanted to share that I have a personal goal to help **(#)** of families get into the home of their dreams this year. As you already know, I'll do whatever it takes to help people. May I count on you to help me reach my goal?

I'd like to share my free real estate app with you. It's so easy to check what's for sale and for what price on your street, in your neighborhood, or any place in the US and Canada. I can send you a text with a link, does that sound good?

I'd also like to offer a real estate update on your neighborhood. All I need is your current address and email and you'll start receiving it right away. You can also add additional neighborhoods you are interested in. Is there another neighborhood you would like to know about? Do you mind sharing this information with me? Thanks!

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# Lead Generation Conversations

## Conversations With Referrals

Hi! My name is **(your name)** with **(Market Center name)**. Your name was given to me by a close friend of both of ours, **(Your contact's name)**, and he/she/they said that I should have a conversation with you. Is right now a good time to talk for a couple of minutes? Excellent!

**(Your contact's name)** said you were thinking about **(buying/selling)** a house in **(time frame for buying/selling)** and asked if I would please get in touch with you. We both want to make certain that you are in great hands and that you have the very best, so that's why I'm reaching out.

Since everyone likes to know what houses are selling for, I'd like to share my free real estate app with you. It's easy to check what's for sale and for what price on your street, in your neighborhood, or any place in the US and Canada. I can send you a text with a link, does that sound good?

### *If they are buying:*

Have you seen anything you like thus far? Great!

Are you working with another agent? No? That's good.

### *If they are selling:*

When are you planning to move?

Have you listed your house with another agent? No? Excellent!

### *Continue:*

The next step is for us to get together. I can answer all your questions and explain how the entire process works. Can we meet today or would tomorrow be better for you?

### *If they are not interested:*

I understand. I'd also like to offer a real estate update on your neighborhood or any neighborhood you're interested in. You can customize what you receive and how often. All I need is your current address and email and you'll start receiving it right away. Do you mind sharing this information with me? Thanks! And do me a favor, please. If you hear of someone with a real estate need, will you keep me in mind? Great. And, after you download the app and try it out, send me a text and let me know how you like it. I'd appreciate that. Thank you for your time today, and please let me know if there is anything I can ever do for you.

**TIP:** If a referral says they are working with another agent, ask if they have a signed agreement with that agent. If they say yes, thank them for their time and end the conversation.

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# Lead Generation Conversations

## Creating Referral Partnerships With Business Owners You Have Done Business With

Hi **(business owner)**, I'm **(your name)** with **(Market Center name)**. I'm in the process of creating a list of preferred businesses and service providers to give to my clients. Since I frequently have clients ask me for a good **(dentist, landscaper, or other business)**, I only want trusted companies to refer them to. Since I have had excellent service from you, would you and your business be interested in being included?

*If yes, continue:*

Great! I like to establish these professional referral partnerships to help grow each other's businesses as well. So if I were to refer clients to you, would you be willing to refer your clients that are looking to buy or sell a home to me with the assurance that I will provide them with the high level of customer service that you expect?

*If yes, continue:*

Excellent! How about we confirm each other's contact information so that we can get started?

## Creating Referral Partnerships With Business Owners You Have Not Done Business With

Hi **(business owner)**, I'm **(your name)** with **(Market Center name)**. I'm in the process of creating a list of preferred businesses and service providers to give to my clients. Since I frequently have clients ask me for a good **(dentist, landscaper, or other business)**, I'm looking for a trusted company to refer them to. I've heard good things about your company. Would you and your business be interested in being included?

*If yes, continue:*

Great! I like to establish these professional referral partnerships to help grow each other's businesses as well. So if I were to refer clients to you, would you be willing to refer your clients that are looking to buy or sell a home to me with the assurance that I will provide them with the high level of customer service that you expect?

*If yes, continue:*

Excellent! How about we confirm each other's contact information so that we can get started?

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# Lead Generation Conversations

## Door-Knocking Conversation Starter

Good morning/afternoon! I'm **(your name)** with **(Market Center name)** and I wanted to take a moment to introduce myself. I'm walking through the neighborhood to pass around a little information to everyone and to ask you if you know anyone who's looking to move into or out of the neighborhood that I may help.

Helping people with their real estate needs is a passion of mine and I want to help more people! Do you happen to know anyone who is looking to buy or sell a home, or invest in real estate?

If you think of anyone, please let me know. **(Hand business card/branded materials)**

I appreciate you thinking of me for all your real estate needs.

Thank you very much for your time.

**TIP:** Consider sending a handwritten card to anyone you had a conversation with the day after door knocking.

## New Listing/Open House Conversation Starter

Hi there, I'm **(your name)** with **(Market Center name)** and I wanted to take a moment to introduce myself.

You may have noticed the home a few doors down is for sale. I just listed it this week and made a commitment to the sellers that the entire neighborhood would know about this new listing.

Often homeowners know someone that might be looking to move to the neighborhood. Do you know anyone interested in moving to **(name of neighborhood)**?

Here is some info on the house and an invite to the open house this weekend. Before I leave, do you know anyone in the neighborhood who is thinking of selling?

Ok. It was a pleasure meeting you. I look forward to seeing you at the open house!

**TIP:** Before engaging in in-person activities, always consider your jurisdiction's or neighborhood's rules and regulations regarding both solicitation and public health and safety. Also keep your personal safety in mind at all times. Consult your local real estate association for best practices.

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# Lead Generation Conversations

## Social Media Direct Message - Option 1: New Follower

Hi **(name)**, thanks for following me! I appreciate your support! Are you or someone you know interested in buying, selling, or investing in real estate?

*If they say they're just looking:*

Ah, I see. If you know of anyone looking for a great home like this one, would you mind sending them my way? Thanks, and I look forward to seeing you.

## Social Media Direct Message - Option 2: Comments/Likes

Hi **(name)**! My name is **(your name)** with **(Market Center name)**. I saw you **(liked/commented on)** my listing at **(address)**. It's an amazing place, and I don't anticipate it being on the market long. Are you thinking of buying or selling in the near future?

*If they say they're just looking:*

Great! I'm the local real estate expert in **(region/neighborhood)**. Most people who are following me are thinking about a move or curious about the worth of their home. How can I be of service to you?

### Get Your Branded KW App Out There!

Offer your KW App to everyone you know and everyone you meet.

Consider adding this to any conversation:

Would you like an easy way to search for a new place? When it comes to real estate, my app has it all. Search homes by ZIP code, school district, neighborhood, however!

You'll discover a lot more than beds, baths, and price. You'll gain valuable market and lifestyle insights for every neighborhood that interests you. I'll share my app with you now and you can start searching right away.

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# Lead Generation Conversations

## Inviting Neighbors Before the Open House

Hello! This is **(your name)** with **(Market Center name)**. I'd like to invite you to the open house at **(address)** on **(date and time)**.

Feel free to drop by, and if you know of anyone from work or a friend that would like to come with you, please feel free to bring them.

By the way, when I find a buyer, I'd like to be able to share with them what people like about the neighborhood. May I ask you what it is that you like about the neighborhood?

Excellent! And, if you were to move, where would you go next and when would that be?

## Open House Welcome

Hi, I'm **(your name)** with **(Market Center name)**. Thank you for coming to my open house today.

I've found that people come to open houses for two reasons:

1. They are thinking about buying or,
2. They are curious about what their home is worth.

Do either of these categories describe you?

## Follow Up After the Open House

Hello! I'm **(your name)** with **(team name)** at **(Market Center name)**. We met earlier today at the open house. Are interested in buying a home, selling your current home, or both? I have great tools to help you find a home/a buyer for your home that I would love to share.

We could get together tomorrow around 4:00 p.m. tomorrow or 2:00 p.m. Wednesday. Which time works better for you? We can meet at my office and go from there.

**TIP:** Gather information about the attendees of your open house through friendly conversation and mention it in your follow-up message. For example, "Best of luck with the playoffs tonight. Go Eagles!" or "Thanks for taking time out of your Saturday. I hope the baby got to her nap on time."

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# Lead Follow-Up Conversations

## Follow Up to a MLS or KWLS Search

Over the last week, we have sent you 5 listings. I am just calling to update my files and see if you are still in the market to buy a home, if you have already purchased a home, or if not, to review the 5 homes I sent you to see if you would like to go tour the inside of any of them.

**TIP:** Consider adding an invitation to meet up to any conversation:

Do you have time to get coffee sometime soon? How about **(date/time)** or **(date/time)**? Which is better for you? Thanks! I look forward to seeing you.

## General Gratitude

This is **(your name)** with **(team name)** at **(Market Center name)** and I'm calling today to tell you how much I appreciate you for **(be specific)**. We were talking about gratitude today and you popped into my mind! I knew this was a good time to thank you and ask if there's anything I can do for you. Please don't hesitate to ask for help or advice or information. I also would like to remind you that my business is built on referrals from people like you who may be in need of my services to buy a home, sell a home, or invest in real estate in the next few weeks. Do you know of someone and would you give me their name? Thanks for taking a moment to think about helping me. I appreciate you!

**TIP:** All is not lost if the buyers say no to the appointment. As long as they are not committed to another agent, "no" in this case really means "not yet." You still have a good chance to ultimately capture their business by setting them up on a SmartPlan in Command, sharing your KW App, and providing value.

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# Lead Follow-Up Conversations

## Care Conversation Starter

Care conversations allow us to check in with and show care and compassion for our sphere. With this conversation you don't "tell and sell" your way to success but "ask and listen" your way into heads and hearts. Use these conversations when they matter, for example after natural disasters or stressful situations. Remember: Care, Compassion, Contribution, and Common Sense.

This is **(your name)** with **(team name)** at **(Market Center name)**. I was just thinking about you today and decided to reach out and see how you're doing.

**Ask a few follow up questions, whatever you think makes the most sense based on their answers.**

How's the family? I saw on social media that you got a new dog. What's its name?

How are the kids doing? Isn't your oldest about to go off to college?

What's going on at work? How have you adjusted working from home?

What's the first trip you plan to take when this pandemic is over?

**Then, if common sense says to move to real estate (which it often will), you ask,**

By the way, we have so many buyers looking right now, I was curious, when are you moving?

**When people say, "We have no plans to move." Asking this next question is key. Ask it, don't skip it!**

Is there a price that would get you to move?

**The next follow up is,**

Who do you know that is thinking about moving now that I should talk to?

Wonderful. Well, it was great to talk with you. Remember, I'm here for you. Reach out anytime if I can help.

**And finally, offer something of value.**

May I send you regular updates on the market and your neighborhood?

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# Transaction Conversations

## Objections to Setting Buyer Appointments Conversations

### *Objection 1: I don't have time to come to the office; can't you just meet me at the house?*

Because your time is so valuable, that's exactly why we need to get together at the office. The time we spend at the office is going to save you 5 to 10 hours of looking at houses. When we get together at the office, I'll be able to pull up every property that matches your specific criteria, we'll be able to view the photos and virtual tours in my office before taking your time to drive by them or spending your gas to drive by them. So, when is the best time to come to the office — is it weekends or weekdays?

### *Objection 2: Let me talk to my spouse and I will call you back.*

I understand that. Let's do this: let's go ahead and pencil in a time that works best for both of you and then I am going to call you back the day before the appointment to simply confirm. If it works, fantastic; if it doesn't, then we just need to reschedule the appointment. When do you think it is going to work best, is it weekdays or weekends? Great, I'll call you Friday. What time specifically would you like me to call you? Two o'clock. Great, what number would I have the best chance of catching you on?

### *Objection 3: I've already seen the house online. I just need to see it to know if I want to buy it.*

I completely understand. The home you are calling about is amazing. However, the sellers request that I meet with all buyers prior to showing them the property. This will allow me to cover any financing issues in case you need a loan, and to give you further information about the property and also the neighborhood. Would you be able to come to my office today at 5:00 p.m. or would tomorrow morning at 9:00 a.m. work better?





# Transaction Conversations

## Clarify the Inspection Report for Your Buyer

I understand your concern about the inspection report. I recommend negotiating a dollar amount so you can be in control of who addresses these issues. I suggest focusing on the big items like heating, air-conditioning, and the roof, to discover what amount of money you'll need to accomplish these repairs. Then we can counter that amount back to the seller. If there are really big issues, it may be that you will need to walk away. However, don't be alarmed just because the list is long. Many things may be simple. We want to think about which, if any, issues will have an affect on the house long-term.

## When Your Buyer Wants the Seller to Make Nonessential Repairs

I understand this is important to you. In my experience, repairing this item typically costs about **(\$price)**. While that's not inconsequential, is it worth losing this house? All things being equal, if the seller had a competitive offer for exactly **(\$price)** more and gave you the chance to match that offer in order to keep the house, wouldn't you want to match that offer?

## Recommend That Your Seller Counter a Low Offer

I pulled up the information on what has sold in your price range since I put your house on the market. **(#)** houses have sold since then. Obviously, your house was not what these people were looking for; we didn't create enough value for your property compared to what they bought. But we have an offer on the table now. It may not be exactly what you hoped for starting out but let me go over the information with you. There are offers that will come in low. Often, the buyers are making an offer based on the advice of a friend or relative. We're not going to turn them away because they've made this low offer. We know that they really like your house, or they wouldn't have made it. We have the opportunity to sell your house if we can negotiate to the price that you need. We're going to make a counteroffer back to them, in writing—one that will reflect the price that you would like. We've already seen the price that they would like to pay. I recommend that we counteroffer and try to get them up to the price that you would like. What's the bottom-line price you would consider? Then let's leave some negotiating room above your number. Most counters go back and forth 2–4 times.

# Transaction Conversations

## Reviewing the Pre-listing Packet With Sellers

Thank you so much for giving me the opportunity to get your home sold.

**(Review the Pre-listing Packet you left with the seller)**

Did you have a chance to review the Guide to Selling Your Home I sent you?

*If yes:*

Great! And did you complete the questionnaire at the back? Do you have any questions about anything that was presented?

*If no:*

Well, let's review the packet quickly before we move on. There are some questions at the end for you to answer.

## Delivering a 10++ Experience For the Seller

I'd like for you to have a great experience selling your home, and that begins with me being very clear on what your expectations are, so I would like to ask you about that. Okay?

**Ask each question, allow plenty of time for them to answer, and write their answers in your packet. Allow equal time for both parties if there is more than one seller.**

Thank you for your honesty. Knowing how to deliver a 10++ Experience helps me serve you in the best possible way.

## Why Me?

Let me tell you a little bit about the team and company I work with **(Market Center name)** and why you've made a great decision to talk to me about selling your home.

**Quickly cover selling points about KW - #1 in the world, #1 training company, best mobile property search app, and accessing hundreds of real estate websites globally! Include information about your Market Center and your personal Value Proposition.**

Any questions?



# Transaction Conversations

## Help Sellers See Their Listing Through the Eyes of Buyers

The location and condition of the home are the first things that attract buyers and their agents. You can't change the location, but you can change the condition of your home so that it's as appealing as possible.

Buyers are attracted or distracted immediately by the condition of the home. From the curb appeal to every room in the house, to the backyard, it all matters.

Buyers rank condition as one of the top three things they consider when choosing a home. Most want a move-in-ready, model-like home.

Buyers are trying to see themselves in any property they visit. They are trying to imagine a wonderful life inside your house. So, our goal is to help them by preparing the house so that nothing distracts them from being able to do this. This means a great curb appeal, a clean interior with as few repairs needed as possible—after all, daydreams don't often come with hammers—and as few reminders as possible that someone else is living here, and that includes not being here during showings.

Once we agree to work together, I'll advise you on how to properly prepare your home to accomplish this. Does that sound good?

# Transaction Conversations

## Signing the Listing Agreement

We're in agreement about the price and it sounds like all your questions have been addressed.

### *Ask options:*

Based on everything we've discussed I feel like we have the makings of a win-win relationship. Would you agree?

Are we ready to move ahead on this?

Is there anything we need to do before we get started?

Would you like me to handle the sale of your home?

Are you ready to decide to choose me to represent you in the sale of your home?

### *If yes:*

Hand the sellers your Listing Agreement and a nice pen and ask them to sign.

Thank you, I am looking forward to...

### *If no:*

What is preventing you from moving forward? Do you have additional questions for me?

## Discussing Sales or Listing Price

**Prepare in advance several comparable properties—similar size, location, and amenities that sold recently. Include this information in the Listing Presentation and go over it carefully with the sellers.**

So, you're probably interested in what your home is worth, right?

Well, the price of your home is determined by the market. That is, what buyers are actually offering and competing sellers are accepting based on recently sold properties. The market fluctuates from state to state, city to city, and even neighborhood to neighborhood. Depending on the number of homes for sale at any given time, the market will either favor the buyer or the seller.

In the last six months the highest sales price for a similar home in this neighborhood was **(\$ price)** and the lowest sales price was **(\$ price)**. Odds are your home will sell for a value somewhere in between. Where in this range would you like to list your home?



# Transaction Conversations

## Determining the List Price

**(Seller name)**, the most important decision you will make is where you will price your property. Pricing your home at fair market value will attract more buyers. Attracting more buyers normally results in a higher purchase price. Overpricing your home results in a longer market time and possibly a lower price.

Would you like to price your property to sell quickly, or will you price your property where it could take longer to sell? The choice is yours. What would you like to do?

## Comparative Properties

**Prepare in advance several comparable properties—similar size, location, and amenities that sold recently. Include this information in the Listing Presentation and go over it carefully with the sellers.**

**(Seller name)**, the truth is, buyers are very smart and informed about the market, especially those who have been looking for a while. They have been looking online at property websites and will know what similar homes in your neighborhood are listed for. And buyers are always looking for a great home at the right price.

I have done some in-depth research and analysis looking at comparable properties that have SOLD recently, and looked at how long they take to sell, and how much competition there is on the market.

So, let's take a look at the comparable properties I've included here, and we'll be able to determine the value of YOUR home. Okay?

# Transaction Conversations

## Closing the Deal Conversation

After studying the comparables, taking into account the unique characteristics of your home and its setting, and using my knowledge of the averages in your neighborhood, I have prepared my recommendation.

Remember that my primary goal is to net you the most money possible. And I believe this pricing plan, matched with my Marketing Plan, will draw agents and buyers to your home and position it as a highly appealing and highly competitive property.

**Write in the average sales price for the area and the price per square foot. Then write in your recommended price range for their home along with price per square foot. For example:  
Average: \$250,000 and \$100/sq. ft. Recommended: \$245,000-\$255,000 and \$98-\$102/sq. ft.**

After looking at everything I've presented about condition and price, what are your thoughts? Do you agree with this price recommendation? Is this what you'd like to list your home for? Are you ready to make a decision to work with me?

***If yes:***

Great, it sounds like we've got a price and are ready to put a sign in the yard. Let's do it and get this house sold!

***If no:***

What about this price seems wrong to you?

**Ask questions and dig into their motivation and concerns.**



# Transaction Conversations

## Seller Objections Conversations

### *Seller Objection 1: We need an agent with more experience*

(Market Center name) is different. I'm a partner with others in my office, so I have lots of motivated agents and many years of experience working for you.

Is there anything another agent said they would do that for some reason I forgot to mention? Did I cover everything you expected to hear? Sounds like you believe I can get your home sold, so let's move ahead now.

### *Seller Objection 2: We need to think it over*

I hear you saying you want to be confident. If you were 100 percent confident in me, you wouldn't bring this up. If you knew I was going to do everything possible, you'd sign. The truth is you can never know that. Let's sign the agreement and know that you can cancel with me any time you are not satisfied.

### *Seller Objection 3: Another agent will charge less*

I can appreciate that there is someone who will work for less, but your agent negotiates for you. If they can't negotiate for their own money, how likely are they to win for you? Negotiation is just one skill I bring to work for you. As we've discussed I also have a comprehensive marketing plan, a full communication plan, and more that I will provide for the fee I charge.

### *Seller Objection 4: Why won't you reduce your commission?*

Let me ask you, if I would be so quick to give up what is fair compensation for the service I provide to you, how can I be expected to fight for you to get the most from the sale of your house?

# Transaction Conversations

## Pricing Objections Conversations

### *Pricing Objection 1: We need a certain amount from this sale to buy our next home*

Would you, as a buyer, pay what the seller wants because that is the price the seller needs? No, you pay what it's worth, right? That's what your buyers will do too.

### *Pricing Objection 2: Can we price a little higher and come down later?*

Here's what frightens me about pricing higher. People who have seen many houses will find yours, but they won't look at it because of the price. We don't want to drive buyers away; we want to attract buyers. We want them to make offers. Does that make sense?

Or:

The greatest number of showings comes in the first three weeks. If buyers see the house is overpriced, they walk away, and we don't get them back. Let's get one or more people to make an offer right away. If more than one likes your price, they might even compete and drive it higher. Wouldn't that be great?

### *Pricing Objection 3: How can we be sure the price you're recommending is the right price?*

Real estate is a market-driven commodity like stocks. If you have ever bought a stock, how do you know what it's worth? When you sell a stock, although you know what you paid for it, the market doesn't care. Like that, the market says what your home is worth. Why would a buyer pay more than the market says it's worth?





# Transaction Conversations

## Staging Objections Conversations

### *Staging Objection 1: I don't see why this is so important*

If we want to sell faster or for more money than your competing sellers, then we need to stand out in terms of condition.

### *Staging Objection 1: Do we really have to make this repair?*

We can sell it just the way it is, but it's likely to take longer and we probably won't get as much money. My recommendation is to have it repaired so that we can get the best price possible in the shortest amount of time. The choice is yours. What would you like to do—make the repair or take longer to sell?

### *Staging Objection 3: Why can't we sell the house "as is"?*

Would you prefer to pay a few hundred dollars to paint a room, or do you prefer to deduct \$500 to \$1,000 from the sales price? Since buyers use outstanding repairs to negotiate a lower price, it's usually in your best interest to make repairs rather than have to negotiate with the buyer.

# Transaction Conversations

## Buyer Called on a Property Conversation Starter

The property at 123 Maple Street is listed at \$249,000. Let's schedule an appointment to see if 123 Maple Street is the perfect home for you. Would today at 4:00 p.m. or Saturday at 10:00 a.m. be better for you?

Great. Let's meet at my office so while we are out you can also review other properties on the multiple listing service that you might be interested in if Maple Street isn't right for you. Does that work for you?

## Buyer Referral Willing to Talk With You

**(Buyer name)**, I'd like to invite you to come into my office so we can discuss what you are looking for in your next home and use my MLS to review properties. This way, we can search for homes that fit your criteria.

When we meet at my office, we can work together to make the most of your time. I can use the tools I have to find the best matches for you and check for any contingencies and other details that would not be apparent from a property visit alone.

Are weekends or weekdays better for you?

## Welcome to the Buyer Presentation

**(Buyer name)**, thank you for letting me help you. My goal is to give you a 10+ customer experience. To do that, I'd like to get a clear idea on what you are looking for in your new home. So, with your permission, I'd like to spend the next 20–30 minutes exploring what the right home for you would be like. We'll call this your 10+ home. With your permission, I'd like to write notes as we go along so I remember everything that's important to you.

It may seem like a lot, but I'd rather ask you 500 questions now and show you the right 5 homes than ask you 5 questions and waste your time showing you the wrong 500 homes. Does that work for you?



# Transaction Conversations

## Obtain the Buyer Representation Agreement

All I ask in exchange for my superior customer service promise is that you agree to work with me exclusively. Does that sound fair?

Okay, can we sign and shake on that?

**Provide the buyer with the Buyer Representation Agreement. Check with your Market Center for a copy. Explain the agreement, and have them sign it. Then, shake hands.**

## Closing the Buyer Representation Agreement

What we're going to do now is sign the Buyer Representation Agreement which puts me to work for you. You're giving me the tool I need to represent you in your purchase. With this tool, I have the opportunity to negotiate for you and get you the best deal. And getting the best deal is important to you, isn't it?

Perfect, then let's do the right thing, sign the Buyer Representation Agreement, and put me to work for you.

**Or:**

Can you see how it would benefit you to have a professional looking out for your best interests as you search for the best home and negotiate to get the best deal?

Great! This form allows me to represent you and look out for your best interests. Here's how we take care of that. You just need to okay this agreement right here.

# Transaction Conversations

## Explain the Benefits of Preapproval

**(Buyer name)**, it's important that you are preapproved for a loan before you begin your home search. Preapproval is a lender's determination of how much money you will be eligible to borrow.

1. You'll know exactly what price range you can afford.
2. When you find the home you love, you'll be able to take action quickly.
3. Sellers will be more likely to accept an offer from a preapproved buyer.
4. And, finally, you can see if there are any errors on your credit report and you can resolve them right away.

Would you like to have one of my recommended lenders call you to help with your preapproval? When is the best time?

Or:

Getting preapproved for a loan makes your home search easier, faster, and more productive. With preapproval you will know which homes are in the price range you can afford and avoid looking at homes that would not work for you.

I now have the ability to offer my clients the opportunity to work with Keller Mortgage. The benefit to you **(client name)** is that they offer \$0 in lender fees, super-low interest rates AND they even give you a \$1,000 credit to use towards closing expenses!

Pursuant to RESPA, Keller Williams agents/associates must provide an ABA Disclosure to the consumer at or before any referral is made to Keller Mortgage. More information on RESPA and the ABA Disclosure can be found here or at: <http://www.kwconnect.com/page/industry-resource/referrals-respa>



# Transaction Conversations

## Objections to Exclusivity Conversations

**(Buyer name)** because of the level of service I provide, I can only work with buyers who work exclusively with me. Let me remind you that by signing you are NOT agreeing to pay me a fee.

You are agreeing to have me represent your best interests and to use my knowledge and expertise to find you the best home at the best price. That is what you want, isn't it—to find the best home for the best price?

### *Objection 1: I don't want to sign anything. I may want to work with other agents*

When you engage me as your real estate sales representative and sign the Buyer Representation Agreement with me, I am contractually obligated to share any information about the seller's situation that I find out; for example, if it is a divorce, relocation, or estate sale. Without that agreement in place, we are not a team. I want to be your advocate. Let's be proactive and sign the Buyer Representation Agreement so I can start working for you today.

**Ask your Team Leader whether your state has sub-agency, dual agency, and/or designated agency.**

### *Objection 2: What if I change my mind during this period?*

I understand completely. Think of this agreement as a form of going steady, not marriage. If you decide at any time that you do not want to go steady anymore, we can just break up. There's no need for a divorce. And you can break up with me if I'm not meeting your expectations! If you feel comfortable with that, you can just okay the agreement with your initials.

### *Objection 3: I can find a home on my own through the Internet*

Searching for homes is the fun part, and we will certainly use the Internet to find your home. Finding your dream home is not why you hire a buyer agent. You hire an agent to help you get the house you find. My job is to protect your interests throughout the home-buying process and negotiate on your behalf to get you the best price and terms.

### *Know when to let a buyer go:*

**(Buyer name)** I appreciate your decision. Since I can only work with buyers who work exclusively with me, I'll have to just wish you luck in your home search. Thanks again for coming in to meet with me today and let me know if you change your mind.

# Transaction Conversations

## After the Agreement is Signed Conversations

### *Explain buyer closing costs:*

**(Buyer name)** before we tour homes, let's discuss closing costs. Generally, if you put 20% down on a house, you can expect your closing costs to be approximately 3% of the purchase price.

So, if you were purchasing a \$200,000 house, the down payment would be \$40,000 and the closing costs would be an additional \$6,000, for a total of \$46,000. If you put down less than 20%, your closing costs may be as high as 4%.

### *Establish your showing process:*

To make the showing process as efficient as possible, set the expectation with the buyer before looking at homes.

**(Buyer name)** we'll be looking at about 5–6 homes when we go out. After you see each home, I'll ask you if you want to buy it. If the answer is "no," I'll ask you to tell me what it was that didn't work for you, so that I can refine our search and provide a better customer experience for you. Does that strategy work for you?

### *Set the next appointment:*

**(Buyer name)** before we part company, let's get out our calendars and set up our next meeting to look for that home you want to buy. If nothing worth seeing has hit the market by Friday, I will call you, and we'll reschedule.



# Transaction Conversations

## Overcoming Buyer Reluctance Conversations

### *Objection 1: What if prices drop?*

**(Buyer name)** are you most concerned about the price of the home, or the monthly payment on the mortgage?

Of course, the monthly payment, I would have to agree with you. Let me ask you another question: do interest rates generally go up faster than home prices come down? What do you think?

Yes, no doubt about it. In fact, interest rates could rise one percent tomorrow, right? Well, home prices would have to come down 10 percent to make up for a one percent rise in interest rates. So, if you are looking for a \$200,000 home, do you think interest rates might go up one percent before home prices come down \$20,000 in your price range?

I would definitely agree with you there. So, let's be proactive and make an offer today before interest rates go up.

### *Objection 2: We want to sleep on it.*

You're right. This is a huge decision. However, I have to give you fair warning with as little pressure as possible. If you are ready to write an offer on this home, other buyers may also be ready to write. Being first to write will make a difference in negotiating the best possible price for you.

Is there something specific holding you back? How can I assist you with your decision?

### **If they still want to wait ...**

That sounds good. I will call the listing agent first thing in the morning to see if the home is still available and then I'll call you. Do you have any questions on the property I can get answered for you?

Do you have any other purchasing concerns I can assist you with?

**TIP:** Remember Fair Housing. Be sure to have a system for these conversations and interact with all clients in the same way. For example, if you require a pre-approval letter before you show homes to clients, you must require a pre-approval letter of all clients before you show homes. You can't pick and choose. Be consistent.

# Transaction Conversations

## When the Buyer Wants the Seller to Make Repairs

**(Buyer name)** until you have a physical inspection, we will not know how much these items will cost, and we could find additional repairs we may want to negotiate. Consequently, you have three choices:

1. You can offer the seller less money now to compensate for these items.
2. You can ask the seller now for a credit to repair these items using your own contractor.
3. Or, I usually advise clients to wait for the physical inspection and negotiate all repair items at one time.

How would you like me to negotiate this offer on your behalf?

## When the Buyer Wants to Make a Low Offer

**(Buyer name)** there are three ways to negotiate a transaction.

1. You can make a low offer and run the risk of the seller rejecting it or countering back at full price to compensate.
2. You can make an offer closer to the asking price and be less flexible if there is a counteroffer.
3. If you really want this home and are concerned that another buyer may purchase it, you can make a full-price or above asking offer and give the seller what they want.

It's your choice. How would you like me to negotiate this offer?





# Transaction Conversations

## Present an Offer to the Seller

Good morning/afternoon, this is **(your name)** with **(team name)** at **(Market Center name)**. We have an offer here for your review. I'm going to go through the offer with you — is this a good time? Now, the offer they came in with is **(\$offer price)**. They're putting **(\$amount)** as earnest money and **(amount%)** as the total down payment. They want to close on **(date)** and they're asking for **(amount%)** in repair limits. What do you think?

## Present a Low Offer to the Seller

Never criticize or show a negative attitude about a low offer. Present all points of agreement first before discussing pricing or other disagreements.

Now, that's lower than our asking price, but it is an offer so we need to decide what you would like to do.

## Recommend That Your Client Accept the Offer

I will urge you to consider this offer very carefully and consider the value of meeting your moving goals; in the long run, meeting your overall goal of selling your home is the more critical need, correct?

Your property has been on the market now for **(#)** days, and the average time on market for this area is **(#)** days.

Buyers are going to look at this same data and they're going to see that your neighbor's house sold for only **(\$price)** and the house around the corner sold for **(\$price)**. They're going to want to pay fair market value compared to these other sales.

If you accept this offer, we are much closer to closing and meeting your goal. You want to meet your goal, correct?

# Transaction Conversations

## Recommend That Your Client Make a Counteroffer

We look at any offer as a positive thing, initially. We always recommend a counteroffer instead of rejecting an offer. It may be that we can negotiate this up to where we need it to be. Let's put together a solid counteroffer. We need to get it back to them quickly to keep things rolling and see if we can make this offer work.

I think the thing to focus on here is the price you want to get for your house. Putting this offer aside, if you could get this home sold and closed in thirty days, what would you feel comfortable selling it for today? Let's put together a counteroffer that would put us in the range where you feel comfortable.

Remember, not all offers are going to work, but it is a good sign that we're getting an offer. You've made this person's list as a house that they thought was one of the best homes for the money. I'll call the other agent and ask them how they came up with that price.

## Presenting a Counteroffer to the Buyer Agent

Good morning/afternoon, **(buyer agent name)**. This is **(your name)** with **(team name)** at **(Market Center name)**. Thank you for your offer—we appreciate it. It was quite a bit lower than what the seller had hoped.

**Pause and see if you can get them to agree with you.**

The sellers have come back with a reasonable counteroffer that should work. The seller is countering back for **(\$price)**. The rest of the terms in your offer are fine except for **(terms sellers don't agree with)**. This is something that will work for everybody — your buyer is getting a home within market, the seller is selling at a reasonable price, and we can all move forward to get this closed, wouldn't you agree?

**TIP:** Do not be afraid of silence! Wait for answers and to see if the other agent will volunteer additional information.



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