TomFerry

Tom Ferry's CEO Agent Sales Manual

tomferry.com
888.866.3377

TomFerry

NAME: ______________________________

EMAIL: ______________________________

Tom Ferry's
CEO Agent Sales Manual

Have a Business & Life
That You Love.

CHAPTERS

CHAPTER ONE

CEO MANAGEMENT 101

CEO Management

"Effective leadership is not about making speeches or being liked; leadership is defined by results not attributes."
Peter Drucker

For an agent and/or a team, the administrative support structure is essential on a daily basis to be successful and is fundamentally necessary for growth to occur without negative effects to customer service, personal life, economics, etc. As an agent decides to take their business to the next level he or she must evaluate it and decide how to structure the foundation of the business to include staff, financials and sales. Once an agent has decided to hire someone, the agent then performs all of the research and leg work to hire the best candidate to fill the most important role, an assistant! To the structure and growth of a team a CEO Agent MUST be well prepared to build a phenomenal foundation that will support the goals and visions of their company and have the passion to lead the team to success!

The decision to grow has a direct impact to an agent because it is an investment in their time, energy and money. For the ROI (Return On Investment) to generate what we are expecting, not only must we have the talents to perform the tasks, but the knowledge to leverage talents to create more business for the greatest ROI! Job descriptions are critically important, and understanding how they affect the ROI is the difference between being good and being EXTRAORDINARY!

When an assistant is hired, they will invest their time and talent for a return and the agent will invest their money, time and knowledge for a return, as well. The proper structure, communication and education of a team are the KEY to success. It is up to the CEO Agent to decide how to implement the training swiftly and effectively to ensure that the company is meeting its goals in sales and finances. The daily operations of the team become crucial to its success and clarity is KING!

A well-oiled team can always out-produce others and we have seen these examples. A CEO Agent is committed to nothing less than a well-oiled machine and has a complete understanding of the learning curve that must happen. It is the ONLY WAY to ensure that future goals and visions of the company are accomplished! Let's be clear that EVERY TEAM PLAYER fundamentally makes a difference each day to the team's production through actions and attitude! As we continue we will begin to define the team's involvement in the business in massive detail, so it is important to know we are starting to understand the impact everyone makes every day! In committing and participating in this program the team will begin to maximize the return on investment to each person! Congratulations on deciding to be the best CEO Agent possible and turning your visions into a reality!

Remember, you are okay where you are at, but you're too good to stay there!

Clarity Of Roles

1. Do you have a CLEAR vision of your desired growth? Yes or No

2. Do you have a CLEAR understanding of where you are now with production, team and financials? Yes or No

3. Do you currently have written job descriptions? Yes or No

   If yes get a copy. If no create one for each role in the vision

4. Ensure you have the TOP TEN most critical weekly tasks for each position (add more if necessary):

CEO AGENT WEEKLY TASKS

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________
9. ______________________________
10. ______________________________

ASSISTANT WEEKLY TASKS

1. ______
2. ______
3. ______
4. ______
5. ______
6. ______
7. ______
8. ______
9. ______
10. ______

BUYER AGENT WEEKLY TASKS

1. ______
2. ______
3. ______
4. ______
5. ______
6. ______
7. ______
8. ______
9. ______
10. ______

10 Leadership Action Steps To Become a CEO Agent

The average agent is taught to sell and master making money, but is rarely taught to be a highly effective CEO that runs a sellable business. An agent can become a master CEO when the rare union of talent unites with leadership, fundamentals, and creates a highly effective profitable sales organization that is sellable. Below are ten key fundamental steps to begin the process of transforming from a great agent to a master CEO.

1. DECIDE

    a. Cut off all other options except for SUCCESS
    b. Be willing to do the necessary work with the right people
    c. Be willing to be UNREASONABLE with yourself
    d. Be willing to be uncomfortable for the sake of growth

2. CLARITY OF VISION

    a. Define an ABSOLUTE plan for your organization
    b. Define each area of the operation based on profit margins
    c. Be PASSIONATE about your desire to achieve this vision

3. INVENTORY OF WHERE YOU ARE NOW

    a. If the vision is not happening the actions need adjustment
    b. What are the ACTUAL results of activities year to date
    c. Analyze how market conditions nationally and locally are affecting you

4. ACTION PLAN TO ELIMINATE GAPS AND MASTER VISION

    a. Develop strategic plans to eliminate all gaps in activities to results
    b. Develop needs plan to align vision to results
    c. Enroll the right people and remove the wrong people

5. DEVELOP SYSTEMS, STRUCTURES AND ACCOUNTABILITY PLANS

    a. Maximize the effectiveness of current systems and structures
    b. Develop key systems and structures necessary for vision
    c. Develop accountability reporting and consequences for lack of results

6. LEVERAGE OF LIABILITIES AND ASSETS

    a. Identify key assets and ensure maximum results are being attained
    b. Identify and minimize all financial and energetic liabilities
    c. Systematically identify key assets necessary and plan the attainment

7. WORKING TO WIN BY DESIGN

    a. Identify the day-to-day structure necessary to master the vision
    b. Complete daily and weekly "review" session for plans vs. results
    c. Continually practice becoming HIGHLY EFFECTIVE with all necessary skills
    d. Outsource all important items that DO NOT require your skills

8. MENTAL DISCIPLINES

    a. Removing obstacles in the most effective way possible
    b. Align your passions to "IGNITE" yourself daily
    c. Demand more from yourself than others do and measure against yourself
    d. Lose the need for OPA (other people's approval)

9. ANALYZE, ADJUST AND FORECAST

    a. SCHEDULE the adjustment times
    b. Write out the analyzed results that you find
    c. Forecast how to adjust the activities to better match the results
    d. Trend your business against market conditions locally and nationally
    e. Make adjustments RAPIDLY for results

10. REALIGN, REDESIGN AND RECOMMIT UNTIL VISION IS MASTERED!

    a. Master the skill of ADJUSTING QUICKLY and redesign as necessary
    b. Develop strategy skills for moving your "ship" back on course
    c. FORCE course correction from yourself and others
    d. LOVE THE LIFE YOU'VE DESIGNED!

Brand and Image

What is a brand or image? The formal definition of *brand is a trademark or distinctive name identifying a product or a manufacture.* The formal definition of *image is the impression made on the public as by a famous person; reputation.* The brand/image that the agent has decided is directly tied to obtaining business in their dealings with the public, centers of influence /spheres of influence (COI/SOI) and to the community as a whole. Branding can also be tied to the image by a tagline, logo, etc., that is often used in marketing, internet sites, letterhead, correspondence and other areas that can brand an agent in a specified place. The cohesiveness of the brand/image across everything you do is important to assist in congruency and gain trust from potential customers that often translates into smoother transactions.

Think of the brands that you use often and realize how consistent it is. For example, Coke, the Diet Coke can, the regular Coke can, the Lemon Lime Diet Coke or caffeine free Coke can, are similar enough that the brand that you ALWAYS know it is Coke! If the agent is the original Coke you must ensure that ALL your interactions as the Caffeine Free Coke are similar enough that there is never any question by the customer that they are dealing with the Coke brand/image.

The question to be clear on is what brand and image the CEO Agent is utilizing and why. Once that is developed, the CEO Agent can maximize it by crossing it over or co-branding your business, marketing (on and offline), Facebook, Twitter, telephone etiquette, daily tasks, dress, office interactions, correspondence, internet sources, scripts, advertising, etc. A fundamental issue that often costs money is not crossing the brand/image through every possible interaction with the clients to maximize visibility. The lack of congruency can confuse a customer and sometimes shake their confidence in the agent. For maximum ROI for the team, this is critical and can increase referral business through consistency.

It is required that gets done not only to provide continued image expansion, but also clarity on how to implement it across the board to include on and offline congruency. This is a place where a team can create more ROI, but is often overlooked.

Here are some ideas on where to use this:

- If you have a logo or tagline is it on marketing pieces, websites, Facebook, letterhead, fax covers, internet, newspapers, advertisement pieces, client handouts, business cards, give away/promotional items, open house logs, scripts, buyer packets, seller packets, pre-appointment letters, thank you cards, notecards and anything else that is seen by the public or customers?

- Take EVERYTHING you have, screenshot all online sites, gather all items that the public sees and put it on a table…. What does it all look like? Send to your coach for review!

- Know why your brand exists. The key question is who developed your brand and why?

Clarity of this will allow you to continue to implement the brand into your back-end systems.

Your brand isn't what you say you are.
Your brand is what your customers think you are!
Make sure your message is saying what you want it to say!

CEO Agent Mindset

The Real Estate business is very emotional for everyone involved and each day the interaction with people must be the most professional, calm and concise communication as possible! Lead the emotions of the team, consumers and industry ON PURPOSE by being mentally strong!

You are currently in a coaching program that not only teaches systems for generating more business, but also teaches mindset and its importance! Have you heard of the phrase, "How do you show up?" This is often a tagline for the question, "Are you in the proper mindset and prepared for what you are about to do?" As the CEO Agent leading a team and clients, you often have the most interaction with clients, leads, vendors and staff. YOU are the common ground! How your team interacts or "shows up" with not only the clients but the vendors such as title, escrow, lenders, inspectors, advertisers, other agents, office administrators, etc. can impact the relationship and business! What are the standards that you hold for yourself and your team?

What is sometimes missed in a job description is, "extension of the agent" - do you know what that means? Often during your interactions with people they are expecting to see what they already know to be true from the agent, but the team may not even realize it. The importance is that it will help co-brand the team, thereby maximizing ROI. If the customer feels that every time they interact with anyone on the team it is professional, courteous, helpful, etc., how much more freely will they want to give referrals? Being conscious of this will not only create a more positive environment but more importantly will impact your ROI by obtaining more referrals! The client has hired YOU to perform a specific duty of buying or selling a home because of who you are and what tools you have. An asset manager or company has made the choice for the same reason! The brand/image is often the "who they are" and the tagline, team members, and activities are usually the "tools they have." In order to be the extension of why the agent was hired, the team must know what that is, then create a plan to emulate it as often as possible. This is all done with knowledge and the proper mindset, also known as attitude and actions.

If we understand how emotional our business is, what can we do to control that daily? If YOU are the common ground among the parties in the transaction, how do you think you impact them? Keeping yourself in a positive mindset with a good mental attitude is key to the success of not only the business, but also to the team! Each team member should know how to enhance and keep the mental mindset strong as much as possible. Knowing how to put yourself in a peak state to "show up" to a client who is entrusting the sale or purchase of a home with the team, can give you amazing insight to keep yourself in tune with the clients, also attain energy and excitement for your career. We suggest books to assist with mindset, doing affirmations and attending events, all of which are part of a positive mindset. A few of the most important books for all team members to read are, **Creating Raving Fans** and **How to Win Friends & Influence People** for obtaining mindset for being the best at what you do and creating the most ideal environment for the clients. Each of these books will offer insight on how to interact with people for the best possible results! Making the most out of every interaction is KEY to the success of the team and the continued inbound referral… more referrals mean MORE BUSINESS!

To enhance your mindset answer the following questions:

CLARITY IS KING: What are my goals and vision… my WHY Statement:

CHAPTER ONE
CEO MANAGEMENT 101

1. Does that vision excite ME to come to work as my best daily?

   Yes or No

2. What are the top 5 things I do everyday to prepare for the day?

   1. ______________________________
   2. ______________________________
   3. ______________________________
   4. ______________________________
   5. ______________________________

3. What are the top 5 things my team does every day to enhance mindset?

   1. ______________________________
   2. ______________________________
   3. ______________________________
   4. ______________________________
   5. ______________________________

4. Have I read and understood “WHAT WE STAND FOR” on page 18?

   Yes or No

5. List 5 areas of MY life that are exciting and where I feel I am contributing:

    1. ______________________________
    2. ______________________________
    3. ______________________________
    4. ______________________________
    5. ______________________________

6. Do I have a clear way of tracking my most important daily tasks to ensure I am accomplishing the most important items to my goals?

    Yes or No

7. Is my work space inspiring to me?

    Yes or No

9. Do I use systems that focus on creating raving fans during the transaction?

    Yes or No

Answering and reviewing these questions is critical to the success of this program and the growth of your team!
If you don't know your WHY and LOVE what you do, this business is hard,
GET CLEAR AND GET EXCITED!

What We Stand For

Here's to the crazy ones.

The misfits.

The rebels.

The troublemakers.

The round pegs in the square holes.

The ones who see things differently.

They're not fond of rules.

And they have no respect for the status quo.

You can praise them, disagree with them, quote them,

Disbelieve them, glorify or vilify them.

About the only thing you can't do is ignore them.

Because they change things.

They invent. They imagine. They heal.

They explore. They create. They inspire.

They push the human race forward.

Maybe they have to be crazy.

How else can you stare at an empty canvas and see a work of art?

Or sit in silence and hear a song that's never been written?

Or gaze at a red planet and see a laboratory on wheels?

Or look at a human being and see divinity?

We admire these kinds of people.

While some see them as the crazy ones, we see genius.

Because the people who are crazy enough to think they can change the World...

Are the ones who do!

CEO Business Planning

Understand that you work in a business that continually grows and as the CEO Agent you must not only be the top sales person in your company and you are also the CEO who LEADS the business in the direction it needs to be going. You are exactly where you are because of choices you as the CEO agent have made! Are you where you want to be?

Where do you start to obtain information about the business... the Business Plan!

Being in the business of real estate can be a well-oiled machine or a drippy oil leak; it depends greatly on how the business plan is developed and executed. The manual that guides the business is the business plan. In the event your team does not have a completed business plan, obtain the following items and put them together in a binder.

- Vision outline and supporting job descriptions for each team member
- Budgets to include YTD actual vs budget and P&L statements
- Brand/Image information
- Specific lead generation tactics currently in place and any supporting documents
- Specific marketing plan to include monthly schedule
- Current annual team goals for both units and GCI, more than one agent obtain for group and individuals
- Current schedules of all team members
- Monthly business forecast with break down of required numbers including prospecting
- Last year's complete numbers for units, GCI, expenses and source of all deals
- Areas of Improvement lists
- Mindset tools
- Daily accountability checklists
- Database information
- Communication tools utilized
- Quarterly reviews
- Agent goals professional and personal
- Numbers Analyzers System

Often these can be obtained by speaking to your coach, from your office administrators, database information review, planners, and so on. This may also be in the creation stage, and if so, obtain all the information you possibly can to prepare for the development of the plan and we will discuss the strategy to design. A business plan with this detail is what a CEO Agent mandates their team operates from. If you are to be a well-oiled machine, you must have an operating manual!

Once the business is clear from the conception of ideas to the implementation of them we can understand how to track for measurement and review. Adjusting to the market conditions and team conditions is the only way the CEO Agent can guarantee success and measure your progress to your plan. It is crucial to accomplish this! Once this is in place, you will start to understand the magnitude of the business you are running and how imperative it is to inspect what you expect. In obtaining the highest ROI, here is a place where outcome measured reports can provide massive clarity to the team on how to grow the business and ensure you are highly profitable and market proof!

CHAPTER TWO

CLARITY COUNTS

Clarity on Commitments, Goals, Accountability and Motivation

As the CEO Agent it is VITAL to have your business operating smoothly and effectively so you can focus on enhancing production, skills and price points! To have a team that can support your vision with clarity and purpose, you must be crystal clear on the commitments, goals, accountability and motivation you have for short and long-term goals. There are multiple avenues for you to obtain this information, but the most important thing is to actually obtain it! In the beginning of this book we discussed the business plan. The tools from that plan are ideal to keep clear on the visions, commitments and goals as well as how to be held ACCOUNTABLE for your execution. Here are a few of those tools again to ensure you are utilizing them to enhance your clarity:

- Daily Accountability Checklists
- Daily and Weekly Schedules
- Business Plans
- Vital Reports (both production and financials)
- Coaching Call Binders
- Production Reports
- Quarterly Reviews
- Annual Reviews
- Goal Charts
- Dream Books/Boards

There may be other items that your team uses to stay connected to their commitments and goals but, if you are not using these tools then you are intentionally keeping your team from growing to its truest potential! The rule of thumb is, often as agents we will review our production as necessary, BUT as the CEO Agent, you must measure where you are against where you want to be and be accountable to eliminate the gap!

Enlist the key players on your team to co-create the most motivating environment possible. Here are some key tips to get you and your team into a more accountable and motivating environment!

1. Get your VISION in writing and on the wall
2. Put the VISION and current production vs goal on your weekly meeting agenda
3. Use videos, audios and visuals to support the vision
4. Watch to Tom's videos as a group weekly
5. Keep your "monthly change initiatives" in visible sight until they are accomplished
6. Host quarterly Team WIN parties or events
7. Have year-end bench mark bonuses based on PROFIT

Now that you have clarity on the commitments, goals, accountability and motivation, what do you do with it? YOU MAKE IT HAPPEN! On a daily basis your team is in action on activities that will ensure that your goals will be achieved, but everyone can get side tracked by the many demands of the day and of life. This is where your MENTAL TOUGHNESS must come in! This is a form of accountability for your vision; the accountability to be the person you claim to be!

CHAPTER TWO
CLARITY COUNTS

Below is a chart of the 5 most common goals for CEO Agents and key items of how to implement the accountability of making things happen.

1. INCREASE PRODUCTION

- Keep a weekly update on contacts made, appointments and contracts
- Prioritize to ensure that prospecting time is scheduled
- Maximize all lead generation sources
- Complete all necessary items for their prospecting prior to their scheduled time and remind them of the time when handing it to them - do not leave a note on desk, if possible
- Ask for your coach's advice on increasing production and assist where you can help
- Assist in lead follow-up daily
- Make this FUN for your agent
- Know if your agent is more driven by pain or pleasure and use that in connection with their motivation for this goal
- Answer their cell phones when they are prospecting and take messages

2. INCREASE PROFITS

- Watch expenses MONTHLY
- Do the data entry if possible, and if not, ask to assist in reviewing monthly P&L's for cost-cutting ideas
- Increase production
- Know the cost of lead generation systems, the results and suggest cuts where necessary
- Keep client gifts and services to a minimum while providing WOW touches
- Stay focused on cost cutting ideas whenever possible

3. INCREASE FAMILY/PERSONAL TIME

- Keep your agent/team on schedule and make sure you know when their day ends
- Remind them of their personal time (i.e. spouse, children, etc.)
- If they are off track of their schedule remind them that it will cut into their personal time
- Assist them in working smarter, not longer
- If possible, keep their calendar for them
- Train them to have you set appointments for anything other than clients
- Keep them on target with reminders well in advance of appointments

4. INCREASE PERSONAL PRODUCTIVITY

- Keep them on their schedule
- If they have too much unscheduled time, put more prospecting time in for them
- Remind them of their commitments
- Keep distractions to a minimum
- Do not interrupt with multiple questions. Save all questions until a check-in time when possible
- Know what needs to be done and ask about it
- Maximize your knowledge on their scheduling system and use it exclusively
- When they appear off track, ask, "Is there anything we can do for you right now?"
- Keep yourself working at the highest level of productivity to inspire them to do the same
- Offer to be in on their coaching calls or at least speak/email their coach monthly
- Master time-saving techniques and use them
- Assist them with personal things as often as you can

CHAPTER TWO
CLARITY COUNTS

5. IMPROVE SKILLS

- Ensure that they receive Tom's videos and ask them about the topic he presents
- Know their role play partners, accountability partners and the times they are scheduled to do them. Ask about it!
- Recap any meetings they attend and incorporate any new skills or scripts into your business binder under the appropriate section
- Ask your extended team to inform you of any trainings and make sure your agent is aware of them and attends
- Offer to be a role-play partner if possible

CHAPTER THREE

TEAM STRUCTURES THAT WORK

Structure of a CEO Agent Team

Defining roles of the CEO Agent, staff and supporting agents

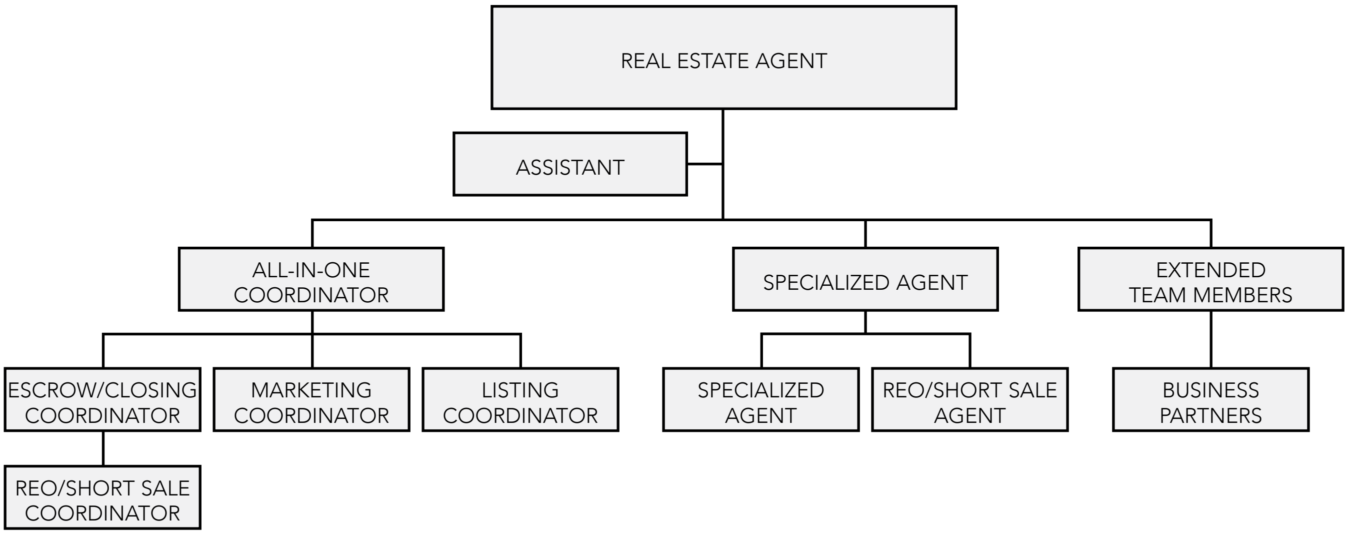
Roles within a team are intertwined and the most important factor to understand is why and how they affect each other and how they ultimately define the team.

The CEO Agent has the primary role of lead generating, lead follow-up, listing presentations, showing property, writing/negotiating contracts and closing deals, which are direct income producing activities. We realize "everything else" that needs to be done, directly supports income producing activities is where a TEAM comes in! Servicing the clients, managing the listings/escrows, and managing schedules/marketing/activities are CRUCIAL to the success of the CEO Agent, which have a direct effect on the profitability factor! The better "everything else" is done directly impacts the growth of the team and as the CEO Agent you must ensure excellence in these crucial company divisions!

There are several administrative layers within a team that develop, based on where the team is in the growth process. Traditional growth models start with a CEO Agent hiring an assistant to help them. As business grows the agent/team often add specific roles, such as, buyers agents, escrow/closing coordinator, listing coordinator, REO/short sale staff, marketing coordinator or an all-in-one who handles all coordinating roles. While working for this company that is in a continual state of growth, you may be moving in and out of certain roles, but it is important that the objectives are essential to your current role every day. Your team may consist of outside vendors that work with you regularly, like your title company, lending company, escrow/closing company, marketing department, broker staff, coach, etc. and these people often become extended team members. Understanding their roles is important to your success and growth opportunities with the agent/team. Regular meetings with the team members are an ideal way to expand tools and systems that may not always be new, but can enhance your personal productivity and success.

Below is a generic outline of the possible growth patterns you may experience. These guides are based on traditional models and as the CEO Agent, creating an outline specifically for your team is necessary.

CHAPTER THREE
TEAM STRUCTURES THAT WORK



Growing a strong real estate practice will generally result in a team concept. There are key indicators that exist in a highly productive CEO Agent, and oftentimes these indicators are missing non-productive teams. In this document, we have prepared an outline that includes all of the key indicators and concepts necessary for you to produce a productive team. The ideal way to utilize this tool is to complete the checklist in conjunction with your coach and take the accountability piece and incorporate it into every coaching session.

First, we must evaluate your current situation. One of the key indicators that we consistently identify in highly productive teams is that the basic foundation of the lead agent/team leader has proven to create the desired results. To identify if this is the case, answer the following:

1. Currently I am on target or ahead of target for my own production goal.

   Yes or No

2. We have at least five lead sources that generate closed sales monthly.

   Yes or No

3. We use a systemized approach to my daily schedule with active prospecting.

   Yes or No

4. We have current buyer/seller/lead follow up systems that create raving fans and ensure that high level service is in place.

   Yes or No

5. We have a clear accountability structure that we utilize daily.

   Yes or No

If you answered YES to 80% or more to the questions above, you are ready to begin developing a productive team. If you answered less than 80%, there may be elements that need to be put into place or strengthened before putting a team together. We suggest you review each of the five elements with your coach and create the timeline and structures to ensure these items are in place. Once you achieve your goals you will be ready to create your dream team!

The guidelines that come next will assist you in developing your team. The organizational chart below will give you a general structure of the flow of the team structure. Note that you may start off with only a fraction of the pieces in place and grow into the full chart over time. Our goal is for you to develop a strong, highly effective team and this is a 1-3 year process that requires consistent organization.

Return on Investment

Understand that you are the CEO of a company that is in a continual growth stage and you have decided to build a team to obtain a higher return on your investment! The only way to obtain a higher return is to ensure your investments are made in the RIGHT PEOPLE!

The real estate business can be a well-oiled machine or a drippy oil leak because it depends on its maintenance, development and review from the CEO and team members. The beginning of any well-oiled team starts with a thought out business plan developed by a CEO who is ready to grow the business. Below, you will find key elements that must be in place to ensure that you have the right investments available to make your team grow in order to provide the largest returns possible!

- Business Plan with 90 day cycles
- Budgets for all annual expenses, income and expenses, P&L Statements
- Brand/Image information
- Specific lead generation tactics with outlined systems to guarantee results
- Specific marketing plan to include monthly schedule and implementation structures
- Current annual team goals for both units and GCI, more than one agent obtained for group and individuals.
- Outline of all team members, including written job descriptions and accountability structures.
- Monthly business forecast with a breakdown of required numbers, including prospecting.
- Complete prior year numbers for units, GCI, expenses and source of all deals.
- Areas of Improvement lists
- Mindset tools and daily structure
- Daily Accountability checklists
- Database information
- Communication tools utilized
- Quarterly reviews

CHAPTER THREE
TEAM STRUCTURES THAT WORK

These may be in the creation stage, especially as you develop a team. The more work done NOW on developing these systems, the better the return on your money! You should review these in detail with your coach and create a timeline that supports your team development to complete these elements. Utilize the job description and team structure outlines to get started with your coach. The tools will assist in unfolding the details of your desires for team members and team growth.

As you begin to understand the business from conceptualizing your ideas to implementing them, you can develop the tracking systems for measurement and review to ensure the results. YOU may start to understand the magnitude of the business you have created, because the development of a strong and profitable team will require work! The most successful teams have structures that support massive growth year after year, and that does not happen by accident.

In the event where you have met these requirements, put them in a binder. In essence, you have begun your Policy and Procedures manual. If you work with the team by following a structure and utilize a manual for success, then you will direct and steer the business into the future. If you do not take the time to put the structure in place, then the growth of your team will be governed by the market and the personalities that work for you. Keep in mind that you are the CEO of this business and all the results are a direct reflection of your decisions.

Finding the Team Members

As you begin to develop your team it is imperative that you find the right members. You must first define what you are precisely looking for so you may begin searching for the ideal members. Below, find the top five ways to complete this search.

1. Search the largest local paper.

2. Utilize all available internet sites, such as, Craigslist, Monster, Facebook, CareerBuilder and any other social media tools.

3. Notify your extended team members on what you are looking for. Tell your manager, your coach, your escrow/attorney, title, lender, etc.

4. Post on college job boards.

5. Notify all your local real estate schools, etc.

These resources produce the best people available. Below is an example of an ad that you might consider running. The purpose of the ad is to save you time and money. If the candidate cannot follow the directions you have set forth, they should be passed on as it is an indication of the future.

REAL ESTATE AD

TOP (city) _____________ AGENT/TEAM LOOKING FOR A DYNAMIC
(ASSISTANT/TEAM MEMBER/MANAGER/BUYERS AGENT)
TO ASSIST IN MASSIVE GROWTH!

Ideal candidate will be a high energy, self starter with abilities to_____________________,
Excellent skills in _______________ and knowledge of __________________.
Salary (commission) + bonus negotiable & based on experience!

Fax/email resume and cover letter
to 888.888.8888
NO LATER than June 10th.
No calls please.
Resumes will be reviewed and interviews scheduled.

Once you receive resumes, compare them directly to the written outline you have produced, then eliminate the people who do not have the qualifications. For those that meet the requirements, set up 5-10 minute phone interviews with them via email and ask them to email you back a confirmation. Again, you are looking for someone who has the necessary tools already in place. Then ask the following questions (CHANGE QUESTIONS TO FIT THE POSITION YOU ARE INTERVIEWING FOR):

- In reviewing your resume, we have the following two questions:

- Tell me how you manage your time and your experience regarding managing other peoples' schedules:

- Are you willing to do personal errands and work out of the house occasionally?

- Tell me how much real estate experience you have in managing listings and escrows?

    a. End the call here if they do not match the qualifications that are a direct extension of you.

- (IF YOU LIKE THEM) Are you available Saturday for an onsite interview?

    a. What is the hourly rate you desire?
    b. When can you start?

Structuring Your Team

In order to create the team structure and systems, you must obtain as much clarity as possible. Knowing the desired outcome allows you to create a team that can hit the target. Utilize this basic outline to begin creating your desired team.

What is our team VISION statement?

Our current year goal is? Units: __________________ GCI: __________________

This is a ____________% increase over last year with _________ units and ____________ GCI.

CHAPTER THREE
TEAM STRUCTURES THAT WORK

The top five lead sources my team will utilize are:

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________

Do we currently have a policy and procedure manual for existing systems?

Yes or No

Are the standards and responsibilities of each position clearly defined in the job description based on the team leader's perception?

Yes or No

Are the pay structures clearly defined in the job descriptions?

Yes or No

To better define the structure of your team, list the top 10 items that are critical for team growth that may or may not be in your current job description:

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________

5. ______________________________

6. ______________________________

7. ______________________________

8. ______________________________

9. ______________________________

10. ______________________________

These items assist you in the growth of your profitable and productive team. Complete these items and submit them to your coach to review. This process when reviewed in detail with your coach will create the most fertile ground to grow the right team. The next page will allow you to begin a very basic job description for each position you are developing.

How to Create a Job Description

1. Job title is: ______________________________

2. Report directly to: ______________________________

3. The primary purpose of this position is: ______________________________
____
____
____
____

4. The TOP 5 ongoing responsibilities and desired results:
   1. ______________________________
   2. ______________________________
   3. ______________________________
   4. ______________________________
   5. ______________________________

5. What are the top 3 ways this position primarily impacts the agent, current clients and leads?

AGENT	CURRENT CLIENTS	LEADS
________	________	________
________	________	________
________	________	________

6. The backup person for this position is ______________________________ and the ______________________ system is used to document priorities of the day.

7. The primary office and lead tracking system is: ______________________________

____

____

____

8. The Key Success Indicator of this position is: ______________________________

____

____

____

____

____

9. Directly impact profit and productivity of the team by: ______________________

____

____

10. Extended team members are: ______________________________________

____

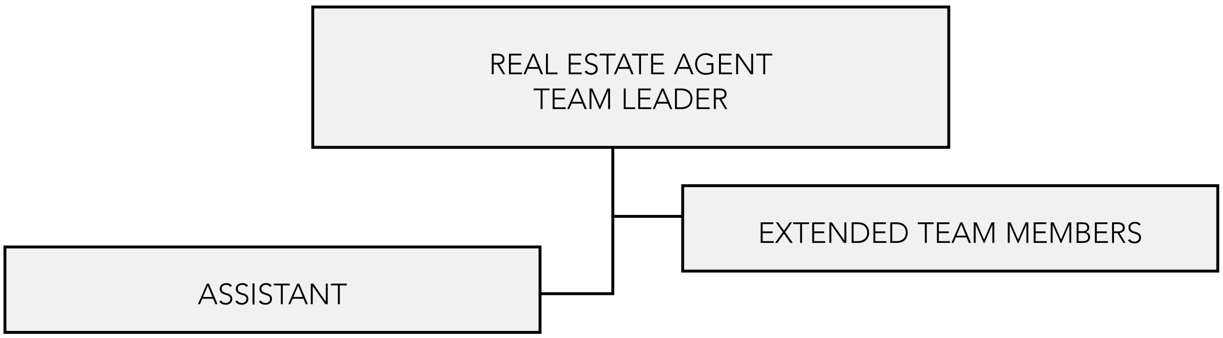
____

11. The pay structure for this position is:____________________________ and paid in the following manner:_______________

12. Daily schedule is:

ACTIVITIES	MON	TUE	WED	THR	FRI	SAT	SUN
DATES:							
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							
11.							
12.							
13.							
14.							
15.							
16.							
17.							
18.							
19.							
20.							
21.							

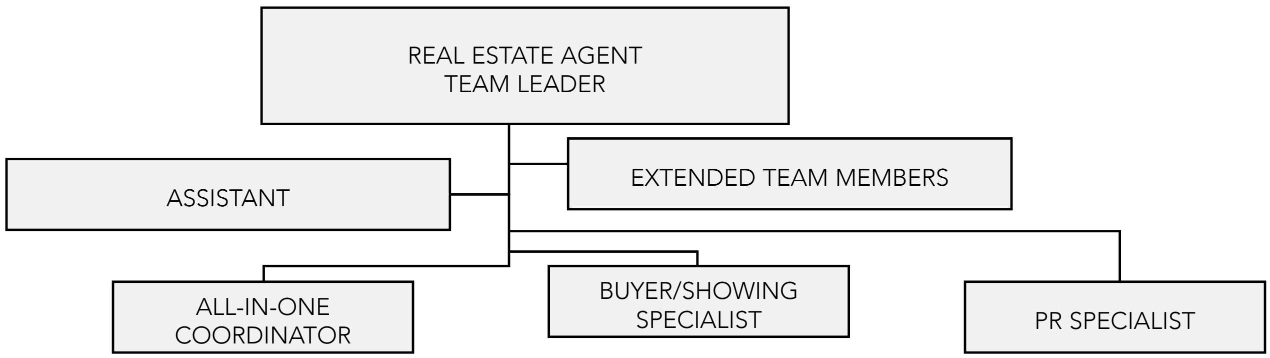
18-30 TRANSACTIONS



TITLE	RESPONSIBILITIES	ACCOUNTABILITY	PAY STRUCTURE
Real Estate Team Leader	* Lead generation * Define & work your plan daily * Write contracts * Show/List property * Negotiate & close deals * Manage money, systems & tools for business * Trend market place * Increase skills * Delegate & empower Team	* Daily number tracking & reporting * DAC * Coach * Office Manager * Family	* % of net income after business expenses & taxes are paid (this is largely based on how well money is managed & commissions negotiated)
Assistant	* Manage clients & files to create raving fans * Complete tasks for lead generation systems * Manage listing/exclusive inventory * Manage agent calendar, schedule & emails * Run office in effective & productive manner * Complete daily tasks * Maintain necessary personal items as outlined by agent * Forecast & develop any needed systems & structures for increasing business	* DAC * Morning intention reports & check-in with agent * End of day completion & check-in with agent	* Hourly wage (find local going rate) * Per closed deal bonus (based on experience & contribution) * Optional profit bonuses
Extended Team Members	* Provide excellent service to clients that co-create referrals * Keep agent/assistant up-to-date on key elements of transactions * Refer any real estate business to agent * Assist in developing new business tools, ideas & materials * Provide agent/assistant with up-to-date trend information	* Attend weekly or monthly sales strategy meetings * Weekly reports on existing clients	* Paid at their fee rate per closed deal

** At 18+ you should & can hire someone profitably.

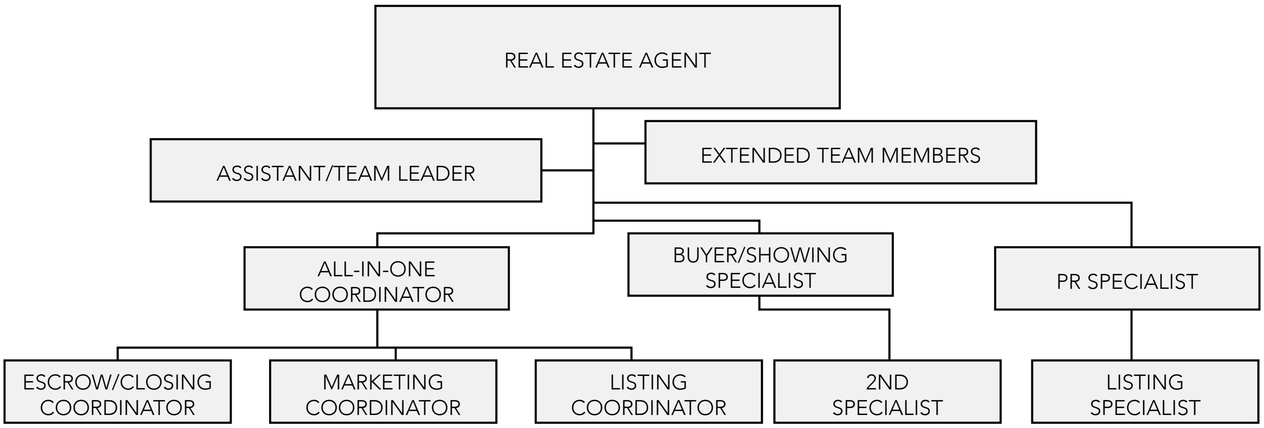
31-60 TRANSACTIONS



TITLE	RESPONSIBILITIES	ACCOUNTABILITY	PAY STRUCTURE
Real Estate Team Leader	* Lead generation & lead follow up * Define & work your plan daily * Write contracts * Show/List property * Negotiate & close deals * Manage money, systems & tools * Trend market place * Increase skills * Delegate & empower staff * Train & manage buyer/listing specialist * Hold weekly sales team meetings with client review built in * Review status reports for all contracts, listings & leads	* Daily number tracking & reporting * DAC * Coach * Office Manager * Family	* % of net income after business expenses & taxes are paid (this is largely based on how well money is managed & commission negotiated)
Assistant	* Manage clients & leads to create raving fans * Develop & complete tasks for lead generation systems * Manage agent calendar, schedule & emails * Manage specialist calendar for showings, open houses, floor time, web leads & sign calls * Manage all lead generation calendars * Manage office in effective & productive manner * Complete daily tasks * Maintain necessary personal items as outlined by agent for agent * Forecast & develop any needed systems & structures for increasing business * Report all team activities with solutions & suggestions daily	* DAC * Morning intention reports & check-in with agent * End of day completion & check-in with agent	* Hourly wage (find local going rate) * Per closed deal bonus (based on experience & contribution) * Optional profit bonuses

TITLE	RESPONSIBILITIES	ACCOUNTABILITY	PAY STRUCTURE
All-In-One Coordinator	* Transaction manage all clients & broker files for listings/exclusives & sales/contracts * Manage files & clients in manner that creates raving fans * Maintain weekly listing & sales reports for assistant & agent	* DAC * Morning intention reports & check-in with agent * End of day completion & check-in with agent	* Per closed deal payment buy client or agent * Optional profit bonuses
Buyer/ Showing Specialist	* Lead generation & lead follow up * Manage & turn leads for sign calls, web leads, floor time, advertising, open houses, agent leads, personal SOI & any other assigned sources * Write contracts * Show property * Negotiate & close deals with agent * Trend market place * Increase skills * Attend weekly sales team meetings * Complete the Lead Tracking report with results daily to lead agent	* Daily number tracking & reporting * Lead tracking report * DAC * Coach * Agent & assistant * Family	* % paid out of the NET commission due agent (note the % can be set or adjustable depending on the amount of deals completed per month) * Optional profit bonuses
PR Specialist	* Lead generation, follow up & appointment booking * Create, turn leads & book agent appointments for all out-bound lead generation systems. Expired/fsbo, web & agent leads, just sold calling, just listed calling, advertising, banks, personal SOI etc. * Increase skills * Attend weekly sales team meetings * Complete the Lead Tracking report with results daily to lead agent	* Daily number tracking & reporting * Lead tracking report * DAC * Coach * Agent & assistant * Family	* Hourly wage (find local going rate) * % paid out of the NET commission due agent (note the % can be set or adjustable depending on the # of deals completed per month) * Optional profit bonuses
Extended Team Members	* Provide excellent service to clients that co-create referrals * Keep agent/assistant up-to-date on key elements of transactions * Refer any real estate business to agent * Assist in developing new business tools, ideas & materials * Provide agent/assistant with up-to-date trend information * Assist in training of buyer/listing specialist	* Attend weekly or monthly sales strategy meetings * Weekly reports on existing clients	* Paid at their fee rate per closed deal

61-100+ TRANSACTIONS



TITLE	RESPONSIBILITIES	ACCOUNTABILITY	PAY STRUCTURE
Real Estate Agent	* Lead generation & lead follow up * Define & work your plan daily * Write contracts * Show/List property * Negotiate & close deals * Manage money, systems & tools * Trend market place * Increase skills * Delegate & empower staff * Train & manage buyer/listing specialist * Hold weekly sales team meetings with client review built in * Review status reports for all contracts, listings & leads * Develop "BIG DEALS"	* Daily number tracking & reporting * DAC * Coach * Office Manager * Family	* % of net income after business expenses & taxes are paid (this is largely based on how well money is managed & commission negotiated)

TITLE	RESPONSIBILITIES	ACCOUNTABILITY	PAY STRUCTURE
Assistant/ Team Leader	* Manage staff & ensure they create raving fans with daily service * Manage lead generation systems * Manage all systems for banks & other specialty lead generation accounts * Manage ALL agent personal business, calendar, schedule & emails * Manage office in effective & productive manner * Complete daily tasks * Develop & implement systems that keep leads funneling into the company * Forecast & develop any needed systems & structures for increasing business * Report all team activities with solutions & suggestions weekly * Assist in development of "BIG DEALS"	* DAC * Morning intention reports & check-in with agent * End of day completion & check-in with agent	* Hourly wage (find local going rate) * Per closed deal bonus (based on experience & contribution) * Optional profit bonuses
All-In-One Coordinator	* Complete all lead generation systems task & schedules * Maintain weekly listing & sales reports for assistant & agent * Obtain daily transaction & listing/exclusive updates * Coordinate all showings, open houses & in bound lead systems * Manage all office coordination for new & existing structures	* DAC * Morning intention reports & check-in with agent * End of day completion & check-in with agent	* Hourly wage (find local going rate) &/OR * Per closed deal payment buy client or agent * Optional profit bonuses
Escrow/ Closing Coordinator	* Transaction manage all clients & broker files for sales/contracts * Manage files & clients in manner that creates raving fans * Maintain weekly sales reports for team leader & agent * Coordinate all closing process, key transfer & move client into past client status * Manage database of all current & past clients for marketing	* DAC * Morning intention reports & check-in with agent * End of day completion & check-in with agent	* Hourly wage (find local going rate) &/OR * Per closed deal payment buy client or agent * Optional profit bonuses

TITLE	RESPONSIBILITIES	ACCOUNTABILITY	PAY STRUCTURE
Marketing Coordinator	* Manage all advertising & marketing plans * Write ad copy & develop new marketing pieces * Develop & manage all listing, sales & prospecting packages * Develop new, innovative marketing & advertising plans * Develop & complete 90 day plans for all existing listing inventory	* DAC * Morning intention reports & check-in with agent * End of day completion & check-in with agent	* Hourly wage (find local going rate) * Optional profit bonuses
Listing Coordinator	* Transaction manage all clients & broker files for listings/exclusives * Manage files & clients in manner that creates raving fans * Maintain weekly listing reports for team leader & agent * Coordinate all listing process to include any necessary details as carpet, windows, etc. on a weekly basis * Complete weekly "home review tours"	* DAC * Morning intention reports & check-in with agent * End of day completion & check-in with agent	* Hourly wage (find local going rate)&/OR * Per closed deal payment buy client or agent * Optional profit bonuses
Buyer/ Showing Specialist	* Lead generation & lead follow up * Manage & turn leads for sign calls, web leads, floor time, advertising, open houses, agent leads, personal SOI & any other assigned sources * Write contracts * Show property * Negotiate & close deals with agent * Trend market place * Increase skills * Attend weekly sales team meetings * Complete the Lead Tracking report with results daily to lead agent	* Daily number tracking & reporting * Lead tracking report * DAC * Coach * Agent & assistant * Family	* % paid out of the NET commission due agent (note the % can be set or adjustable depending on the amount of deals completed per month) * Optional profit bonuses
2nd Specialist	* Lead generation & lead follow up * Manage & turn leads for sign calls, web leads, floor time, advertising, open houses, agent leads, personal SOI & any other assigned sources * Write contracts * Show property * Negotiate & close deals with agent	* Daily number tracking & reporting * Lead tracking report * DAC * Coach * Agent & assistant * Familyv	* % paid out of the NET commission due agent (note the % can be set or adjustable depending on the amount of deals completed per month) * Optional profit bonuses

TITLE	RESPONSIBILITIES	ACCOUNTABILITY	PAY STRUCTURE
Listing Specialist	* Lead generation & lead follow up * Manage & turn leads for sign calls, expired/ fsbo, web leads, floor time, agent leads, farming, advertising, personal SOI & any other assigned sources * List property & obtain price reductions * Weekly "property conditions" reports for clients & agent * Negotiate & close deals with agent * Trend market place * Increase skills * Attend weekly sales team meetings * Complete the Lead Tracking report with results daily to lead agent * Develop quarterly listing strategy plans for sellers & agents	* Daily number tracking & reporting * Lead tracking report * DAC * Coach * Agent & assistant * Family	* % paid out of the NET commission due agent (note the % can be set or adjustable depending on the amount of deals completed per month) * Optional profit bonuses
PR Specialist	* Lead generation, follow up & appointment booking * Create, turn leads & book agent appointments for all out-bound lead generation systems. Expired/fsbo, web & agent leads, just sold calling, just listed calling, advertising, banks, personal SOI etc. * Increase skills * Attend weekly sales team meetings * Complete the Lead Tracking report with results daily to lead agent	* Daily number tracking & reporting * Lead tracking report * DAC * Coach * Agent & assistant * Family	* Hourly wage (find local going rate) * % paid out of the NET commission due agent (note the % can be set or adjustable depending on the # of deals completed per month) * Optional profit bonuses
Extended Team Members	* Provide excellent service to clients that co-create referrals * Keep agent/assistant up to date on key elements of transactions and trend info * Refer any real estate business to agent * Assist in developing new business tools, ideas & materials * Assist in training of buyer/listing specialist	* Attend weekly or monthly sales strategy meetings * Weekly reports on existing clients	* Paid at their fee rate per closed deal

Pitfalls to AVOID in building YOUR team

In order to be successful there are things to AVOID as well as things to do. Below, find a list of items to AVOID, taken from some of the top teams in the nation.

- Don't hire people without clarity in their positions
- Concerned with "being liked" or "feelings" and not leading as a CEO Agent
- Hiring a team member to increase a business that is not producing its current goal.
- Not reviewing the details of your team with your coach and manager.
- Moving forward with lack of constant leads funneling in
- Allowing staff and agents to slide on reports of activities and leads
- Being unfocused on the growth of the business
- Lacking the mental and time discipline personally
- Allowing team members to be unstructured and undisciplined
- Being overly concerned with "being liked" vs. moving the business forward
- Hiring too fast and taking too long to fire
- Not paying attention to the details because "you were too busy"
- Lack of conversation training for yourself and your team members
- Allowing lead generation time to be optional
- Not being the CEO Agent LEADER with energy and attitude
- Not giving the property SET UP for your teammates
- Not managing family and finances to protect your assets
- Being reactive to the market and not proactive
- Getting caught up in the drama of the team or the office
- Letting EGO get in the way of teamwork
- Not tying bonuses into profits
- Trying to do the same old thing and expect different results
- Not being comfortable with being uncomfortable
- Not deciding early enough…. ENOUGH IS ENOUGH! Get in control!
- Believing that you or your team works too much… usually not on the most important things… PROFIT SEEKING TIME
- Assuming everyone else can do what you do
- Trying to do this all with no guidance
- Not asking enough questions and thinking you know all the answers
- Thinking your team will make up for something you lack
- Playing the blame game
- Not doing enough ABC's everyday

CHAPTER FOUR

CEO TOOLS TO INCREASE PRODUCTIVITY AND PROFITS

How a 15-Minute Check-In Can Change the Day

Each day you are given a certain amount of time to complete your prospecting, negotiating, tasks at the office, managing customers, files and team in the manner that impact the business. To determine how many minutes you have, here is an exercise.

Your total number of working hours per day		Minutes in an hour			
________________	x	________________	=	________________	minutes to impact the business per day!

As the CEO Agent, the most important thing to improve on is your team's EFFECTIVE use of time on a daily basis! We can always use our time more effectively to increase profit and production!

To ensure that ALL the necessary things are covered, you need to take the first 15 minutes of the morning and the last 15 minutes of the evening and recap them with yourself and the team. Below is the ideal outline for this recap. It is intended for you to stay on target with the most impacted business needs and intended to eliminate any unnecessary conversations.

1. What appointments do you have today or have been set today?
2. What needs to be prepared for each appointment, meeting or drop bys?
3. What are the important clients and lead needs today?
4. What lead generation support is needed today?
5. Any personal support needed today?
6. What deadlines are set for today?
7. Are we playing ALL OUT today?

8. What are the top five priorities today?

AGENT	YOU
1. ______________________	1. ______________________
2. ______________________	2. ______________________
3. ______________________	3. ______________________
4. ______________________	4. ______________________
5. ______________________	5. ______________________

Achieve The Goals, Don't Just Say Them!!!

"Some people dream of success… while others wake up and work hard at it"
Anonymous

Why do we write and say goals and visions... so we can achieve them! We know they will change our lives and that is why we strive for them. Although it is simple in theory, it is complicated in execution. If you want to know what you and your team really wants, know the goals and why they want them. The CEO Agent must enlist their team, coach and others to support the vision daily! It takes energy, passion and commitment to achieve the goals and as the CEO Agent YOU MUST be willing to work hard at making it happen! This is in the art of mastering the 12 key business items for every business! Below are these 12 key business structures when mastered and implemented, can guarantee the success of the business and the maximum return on investment for your company!

1. Business Management
2. Administrative Structure of Team
3. Schedule and Activities
4. Customer Service
5. Back Office Systems
6. Lead Generation Systems
7. Communication and Presentations
8. Lead Conversion Support
9. Leadership and Team Building
10. Commitment and Motivation
11. Goals and Planning
12. Supporting the Team

When you take personal responsibility to be as dedicated to your vision, you MUST be accountable for the results. When you have reports that show the increase and growth that has happened, you give yourself the gift of turning your vision into a reality! You can be the connector of the dreams and the daily activities. This will NOT happen if you are just showing up to "work" and getting your "job" done or if anyone on your team is doing this. We don't intend to offend anyone who has used those words; we just want you to realize at the very deepest root, you are EXACTLY WHERE YOU ARE BECAUSE OF THE CHOICES YOU HAVE MADE! Is the vision clear and are you making it a reality or is it not clear and therefore not even happening?

Be crystal clear, you are reading this because you want more out of life right? So out of curiosity... what are you waiting for?

Get Projects from Concept to Completion

"The successful person makes a habit of doing what the unsuccessful person doesn't like to do. The successful person doesn't like to do it either, but he does it because he recognized that this is the price of success."
Herbert Gray

In your busy day it can be a challenge to take a project from conception to completion, yet the very act of this is a critical step in a growing business. It would be ideal to take parts of a project and implement the parts that you have already mastered, but in the business you work, for that is simply not realistic. The reality is that you will need to take the entire project and ensure the concept is clear and completion happens. That is the role of a CEO Agent!

You have been given many tools in the manual to assist you in taking the project to completion. The two imperative project tools are the Project Planning Tool and the Brain Dump tool. These tools will allow you to capture the concepts of the project from the necessary people, including yourself, then have written documentation on the planning and implementation of the project along with the intended results. These magic ingredients are critical for you to have when moving a project forward, but there is an ingredient that no project can be completed without: YOUR COMMITMENT! Your commitment to completing a project and taking full responsibility for the results is the key ingredient. This is the case with every aspect of you as the CEO Agent that leads your team to greatness! Below are the tips on how to master taking a project from conception to creation, even during your busiest days.

- Identify the project and who you will need to enroll in the project for thoughts and actions

- Start a file folder with the project name across the top and the Project Checklist stapled onto the left hand side. You may opt to use a binder if it is a large project.

- Schedule a short meeting with all necessary participants and complete the Brain Dump process around the project. Record the ranked results on a word document, place the copy in the file and issue to all attendees at the meeting.

- Schedule time based on the size of the project to do the following items as soon as possible:
    - Complete the Project Checklist and issue copies to all participants
    - Assign deadlines for each project task and who will be doing that
    - Put those dates on your calendar in a follow-up fashion
    - Schedule the completion date on your calendar
    - Schedule the tracking system on your schedule
- Take 100% responsibility for making these steps happen.
- Record progress on the Project Checklist and ensure that copies are distributed to the participants.
- Ensure that the results are captured and provided to all participants monthly at team meetings or in the fashion that you outlined in the Project Checklist.
- Watch the business grow and celebrate the victories!

Project Planning Tool

Project Title: ______________________________

Start Date: __________ Evaluation Date: __________ End Date: __________

People involved in project: ______________________________

____

____

Intended outcome of project: ______________________________

____

____

The measurable result of the project: ______________________________

____

____

TASK TO BE COMPLETED	RESPONSIBLE PARTY	DUE DATE

Has the master calendar been scheduled with timeline of project?

Yes or No

Responsible people have scheduled their assigned due dates.

Yes or No

The lead of this project is: ______________________________
and will be responsible for tracking time lines and people involved.

Plan for Success and it is GUARANTEED!

"Do you love life?
Then do not squander time, for that's the stuff that life is made of!"
Brian Tracy

Throughout this book we have learned the power of planning and the impact it has on you, the team and the success of your company. With that thought in mind we will ask this question: How well are you planning your days at this point? That question is not intended to judge in any way. It is intended for you to think about structure of the day and whether or not there is opportunity for growth in that area. Each day you are given a certain amount of hours to perform the leadership role and you can choose to extend that time because of poor management, or you can choose to master that time and create EXTRAORDINARY results! Recall that time is equal among all people. Each person is given 24 hours in a day, no more or no less, and the hours are not allowed to be carried over or borrowed upon for another day. To master your time you must PLAN EVERYTHING!

Planning everything may not seem possible but realize that it is impossible to grow without planning. Think back to a time when you took a vacation and wanted to see everything possible in the short amount of time you had. Did you plan for it? How well did you plan for it? Did you get to do everything you wanted? If not, what was the reason for that? You might say "Well, we wanted to chill out and do nothing on my vacation." Believe me when I tell you that you planned for that, too! What did you take or not take in order to ensure you could "chill out"? This concept is exactly the same at work. If you say you are too busy to plan then you will be too busy to plan, because you planned it that way! How can you plan to be too busy? You planned that because you allowed the distractions, needs, emergencies and desires of others to take precedence over the defined objectives of your day. If you have no defined objectives of the day then you have planned to be in a reactive mode and that is exactly how your day will go!

We know this sounds strange, but it's simply a reality of what we do to ourselves when we do not properly plan our days, our moments and our lives. Planning can be complicated or easy and it is up to you to determine it. The simple way to plan is to know what has to be done and why, then plug it into time slots available for the day, week, month and year. The complicated way is to make each thing a big ordeal, hmm and haw over what to do and then how to do it only to get stuck in the lack of clarity. Here is the best thing about learning to plan properly: it is an art that you can continue to refine as you grow, and you can learn from it! In coaching you are given tips and tools to utilize in structuring your days and time in the most efficient way. We encourage you to look back at the answer to the question, "How well are you planning your days at this point?" If the answer is along the lines of anything less than PERFECT then go back to the basics of planning an extraordinary day, get your daily action checklist, then execute the plan!

Take massive action in regards to managing your time with planning. You can plan for interruptions as well to ensure that NOTHING takes you off track of being anything less than EXTRAORDINARY!

Brain Dumping

"Brilliance is being created by the thoughts in our minds daily and it is in the writing of this brilliance that captures the thoughts that become dreams and goals. Without the capture of the thoughts, they will disappear into the vast vortex of our minds and often be unrealized."
Anonymous

This concept has been used for years in the corporate world when doing creative sessions for growth or improvement in an organization. This process is now being taught worldwide to all professions as a tool to utilize in creating clarity of ideas and thoughts for groups or individuals. This can be done in a variety of ways as we will outline shortly.

The true power in brain dumping is that you let your thoughts flow with no judgment and the faster you write the less judgment you are able to have because of the speed in which you are writing. This produces the true thoughts of your mind around any subject you choose to "brain dump" about. To understand this concept first hand, we want you to look back on your goals and pick one from the As Administrative Leader portion and write it below.

GOAL:

Now look at that goal. Read it aloud and begin your brain dump here. Remember, write anything that comes to mind, do not stop until we say so, because you don't know how much time is allotted, so keep dumping quickly!

BRAIN DUMP

As a result of the exercise, you now have the exact thoughts of your mind captured onto this paper around the goal you indicated. As you can see this tool is very powerful and allows you to capture multiple streams of ideas at the same time. The next step is to organize your brain dump. If you are a neat writer you can combine this step with the other step above for a time-saving tool. Take a moment to organize the list onto the following chart and we will begin to organize your thoughts.

h ____________	h ____________	h ____________
h ____________	h ____________	h ____________
h ____________	h ____________	h ____________
h ____________	h ____________	h ____________
h ____________	h ____________	h ____________
h ____________	h ____________	h ____________
h ____________	h ____________	h ____________
h ____________	h ____________	h ____________

You now have a list of ideas around the goal you indicated. The next step is to prioritize your thoughts, but prior to doing this, you must walk away from this project for at least 15 minutes to allow your mind to become unattached to the thoughts you have written. Once you have done that you will then rank 1, 2 or 3 for each thought in relation to how it benefits or impacts the goal and how quickly and effectively you would be able to implement it. For example, if your goal was to enhance lead generation by 50% and a few of the items were complete and implement check sheets, pay for service for new leads and make 10 calls per week personally to warm leads, you might consider the 1st and 2nd as the easiest and quickest way to generate results. Score them as a 1 and then put a 3 on the middle one for future investigation. The idea is that some things will stick and make an impact, while others will not. (Remember, you are unattached so let the best ideas rise to the top.) Once you have completed this process, you can take the recorded thoughts and create a commitment and motivation around it, attach it to the goal and make it happen!

This system is a very powerful way to obtain new thoughts on anything. Master this system and then utilize it in your team meetings when you need to brainstorm new ideas or systems. If you have not documented all of the systems that are in progress, then the entire business is running off of the thoughts in your head and your teams head and that is a scary place to run a business! You are the leader, the CEO. Take the tools you have been given and make sure the business is running at optimum speed with the intended results!

FAILING TO PLAN IS PLANNING TO FAIL!

How To Enhance Team Meetings

Team meetings are the best way for you and your team to connect and plan the needs of the business. There is a difference between a team meeting and your daily check-in with your assistant. As outlined in earlier sessions, your check-in should be quick and are intended for you to know what you and your team are doing and what things you are doing that will affect them for that day. The check-ins when done consistently, at the beginning and end of the day, will eliminate the multiple phone calls for status, again, giving you more control.

The team meeting can be as formal or as informal as you desire. The intention of the meeting is not to chat or check in; the meeting is to ensure that the business is moving in the direction you all desire and to ensure that the necessary outcomes and tasks are being completed to master your vision. The timing and frequency of this meeting is up to you and your team and may adjust with the amount of growth you are experiencing from month to month. This meeting must be properly planned by you, the CEO Agent. You will set the tone and flow of this meeting based on the needs of the business and you will create a structure by obtaining the necessary information you need, based on your questions and activities in the meeting. Ideally, your team will plan in the same manner, but if they do not, the meeting can still make an impact based on your planning. Allow time slots for your team to discuss what is on their mind. If this meeting is not properly planned, it will not add value to the business and will be a "to do" vs. a meeting that moves the business forward with growth and excitement.

Below are the most important elements to EXTRAORDINARY team meetings. Take these ideas and implement an EXTRAORDINARY TEAM MEETING AGENDA form that is followed at every meeting. Once designed, review with your agent/team and ensure that this form is utilized for every team meeting from this point forward.

- Utilize your written EXTRAORDINARY Team Meeting Agenda.
- Prepare your agenda in advance of the meeting.
- Bring an updated projection report and lead sheet.

- Keep a team meeting file and put anything that needs to be reviewed in between meetings. This will ensure information is shared properly and in an interactive fashion vs. a post-it note.
- Send reminder emails 24 hours prior to the meeting to your agent/team and ask that they send you any necessary agenda items. Let them know you have scheduled time for them to review even if they don't have an opportunity to respond to you.
- If possible, have the meeting in a conference room or off site. If you must have it in your working area, put the phones on "do not disturb" and if possible, turn of cell phones.
- Schedule your meeting, start on time, and track time. This will show your dedication to be timely!
- Record the important results, type up, and distribute. Keep previous meeting notes filed in the team meeting file or binder for quick review.
- Report at each meeting the results of the business since the last meeting.
- End EVERY meeting with EXCITEMENT!

Extraordinary Team Meeting Agenda

Date: ____________________

1. Call to order:
2. Attendance:
3. Recap of last meeting and results:
4. Business updates:
   a. Team Support
   b. Closing Transactions
   c. Listing Transactions
   d. REO/Short Sale updates
   e. Customer Service
   f. Lead Generation
   g. Marketing
   h. Project updates
   i. Other
5. Administrative updates:
6. CEO Agent Updates:
7. Additional Agenda Items:
8. Intended actions and results for next meeting:
9. Schedule of next meeting:
10. Team Chant or Motto with excitement for what is possible!

CHAPTER FIVE

IT'S ALL ABOUT THE LEADS, BABY

Enhance Lead Systems and Profits

A system is *interrelated parts working together to produce a predictable and consistent results.* In lead generation the evidence of the results working together will produce leads that turn into sales and close escrow. If that end result is not being met you need to revisit the systems and correct them until that exact result is happening. To each lead generation system there are countless details that go into making it successful and this is where it must be required that the details get done!

Understanding the specific systems that you and your team utilize for lead generation and ensuring they are in written detail is the first step to enhancing the systems and profits. As you have begun to understand throughout this book and having the knowledge of systems is not enough, it is critical to have the measurable details of each system and measure the results against the desired outcomes on a regular basis. You impact the systems daily by providing data, pulling reports, generating packets, tracking marketing calendars, monitoring schedules, providing raving fan service and an EXTRAordinary experience of your internal and external clients. Connecting the tasks that you perform daily to a specific lead system that is in place will allow you to complete the task with the end result in mind.

A key element for enhancing lead generation is following-up your assigned tasks of the systems and ensure they are running smoothly and consistently. An example is if you are responsible to pull expired listings daily, ensure this is done at a specific time prior to the prospecting time, be consistent with providing the detailed information, and follow up with the plan by sending the expired package in timely fashion. You can take this a step further and pull the new listings daily in your farm, file the print-outs by street name in an A-Z file and cross reference that file daily when pulling expired listings. Doing this enhances the system because often an agent will pull vital information, such as phone numbers off the MLS prior to the home expiring and having the original print out gives you access to the information. This is an example of an enhancement to the expired system and was developed by someone taking responsibility to enhance a team lead system in order to get better results! Take responsibility for enhancing the details of the lead generation systems your team is working in! Profitability of the systems can also be manifested by tracking the results and measuring them against the intended outcomes. This critical area is an ideal place for you to make a strong impact on the system and team profits.

The next page is a simple checklist designed for you to complete on each lead source your team utilizes. Having each lead system clearly defined in writing for you and your team is the only way to measure its effectiveness and to define where you impact it. This checklist should be completed by you and kept in your business binder. This is the CEO's responsibility. It is also a great tool to utilize when designing a new lead generation system for the team. Expand this onto additional paper if needed. Remember the more details, the better the results!

Team Lead Generation System Checklist

1. Team Lead System: ____

2. System is: Referral Based Direct Call Based Inbound Call Based

3. System is designed to generate ____________ leads per month

4. Other business enhancing outcomes this system will produce:

   ____
   ____
   ____

5. Basic system outline:

   ____
   ____
   ____

6. Necessary tasks to be done PRIOR to prospecting time:

TASK	RESPONSIBLE PARTY	BY WHEN

7. Prospecting for this system is done by ________________________ in the following manner:

____

____

____

8. Follow up on this system is done by ________________________________ in the following manner:

____

____

____

9. Results are tracked by _______________ and reported monthly to ___________________ .

   Data is collected in the following manner:

____

____

____

10. The estimated monthly cost of this system is $___________________ and divided by the _______________ leads expected equals a $___________________ per lead cost.

Track Lead Generation Systems

You cannot expect what you do not inspect!

Generating leads and filling the lead funnel is the backbone of a CEO Agent's business and without a steady stream of leads the business will not prosper. So how do you ensure that the lead systems in are generating the desired results and profits for the business to prosper? This is only done by tracking the results and analyzing them against the intended outcomes. This critical step is vital for the growth of the business. New lead systems are common in our field and often agents try to increase business through new lead generation systems, but not tracking results is often the most costly mistake a real estate agent can make and a CEO would NEVER pay for a system that does not produce the required revenue!

To avoid those types of costly mistakes you must properly track systems. There are a variety of ways to track this information and below are the outcomes and tools necessary to track the results. Fully understanding how to track lead source information in your database will assist you in maintaining this process easily. If your database does not have a lead generation source field for searching purposes, you can also achieve the results by assisting a certain category or code. If you do not have a database to do this with, you can track results on a simple excel spreadsheet as well and we encourage you to start a new spreadsheet each quarter. However you track the result, make sure it is done consistently!

The key outcomes for properly tracking lead systems are:

- Maintain and monitor expenses and time factors.
- Focus on enhancing systems that currently produce less than desired results.
- Enhance the experience for new leads.
- Provide proven statistical data on systems that produce desired results to coach and customers.
- Eliminate unsuccessful systems that waste time and money.

How to obtain the lead sources:

1. Build in the question, "How did you hear of our team" by whomever is in first contact with a lead. Include questions on scripts and record answers on lead sheets, notes, database or file cover.
2. If the answer was not given when the lead was originated, then verify that with your agent. If they are unsure, ask the client at the time you introduce yourself and record the answer on your tracking system. Keep track of unassigned leads as well.
3. Be diligent in obtaining the answer and record them!

As you track the results in this manner you will begin to verify the systems that are producing sales for your team and you may have systems that are new or in place that have not produced sales. This knowledge is extremely valuable and will be utilized to make proper business adjustments.

Analyze where your transactions have come from for your team this year.

Total transactions closed year to date: ________________________

Of those transactions, the following is the breakdown of the source of business.

__________ Clients have been referred or are repeat clients or ______________ %

__________ Clients have come from marketing system or ______________ %

__________ Clients have come from the farming system or ______________ %

__________ Clients have come from the open house system or ______________ %

__________ Clients have come from the FSBO/Expired system or ______________ %

__________ Clients have come from the call capture system or ______________ %

__________ Clients have come from the ______________ system or ______________ %

__________ Clients have come from the ______________ system or ______________ %

CHAPTER FIVE
IT'S ALL ABOUT THE LEADS, BABY

What is the preferred lead generation to closed escrow breakdown for the agent?

System:________________%	System:________________%
System:________________%	System:________________%
System:________________%	System:________________%

Take the data you currently have and begin providing the monthly report to your coach on each lead generation system and the results it produced each month. If you have outlined and scheduled the necessary tracking of lead sources in the Team Lead Generation System checklist, this will not be hard to do. If you have not, go back and re-create that step for as many of the clients as you can, and implement the tracking from this point on. These reports should be combined and filed in your business journal.

On the next page is a simple report that can be done monthly. It includes data that will allow you and your team to monitor the key outcomes for each lead generation system. This is a basic outline of the six critical components of a monthly report to capture the necessary data for proper analysis of the lead generation systems on a monthly and ongoing basis.

Team Monthly Lead Generation Report

1. Agent/team generated ______________ leads this month.

2. Lead to source breakdown is as follows:

Source: __________________________ # of Leads: __________________________
Source: __________________________ # of Leads: __________________________
Source: __________________________ # of Leads: __________________________
Source: __________________________ # of Leads: __________________________
Source: __________________________ # of Leads: __________________________
Source: __________________________ # of Leads: __________________________
Source: __________________________ # of Leads: __________________________

3. Circle each lead source that produced the intended results and highlight the lead sources that did not produce the intended results.

4. For each highlighted source write out the where system breakdown occurred and how to get it back on track.

BREAKDOWN	YOU
____________________________	____________________________
____________________________	____________________________

5. Agent/team had ___________ listing appointments and ________buyer appointments.

6. Agent/team opened ___________ new sales and closed ___________ transactions.

This may seem too simple to impact lead systems and profits, but we guarantee that if you track the monthly details and ask yourselves the critical questions, the result you will develop will be improved systems, increased profits and more leads. Make sure this information is provided to your coach every month to review for stronger results.

Key Enhancements for Lead Generation Systems

Each lead generation system that you and your team have in place can be a plus and enhanced by you to ensure they are generating the intended results and profits. As the CEO Agent, you must ensure that the Team Lead Generation Systems Checklist is complete for each system and attached are the details of the system. Review this information with your coach. Completing that process ensures that the details of each system are clearly defined and you may have also found additional areas to enhance your lead generation systems.

Doing a brainstorm after completing the checklist will allow you to creatively think about how to enhance the system from a team perspective and develop the tasks together. If you have done this and would like additional assistance with a particular lead generation system, review it with your coach and request the name and number of a person who has generated great results with that particular system. Call and ask about their system details. To recap the process that you completed, answer the following questions.

- Currently our team has _______________ lead generation systems in place
- A Team Lead Generation System checklist has been completed for each system and We have reviewed them with my agent/team:

  Yes or No

- We take responsibility to track the monthly leads and report back Team Monthly Lead Generation Report:

  Yes or No

  (if no please ensure the responsible party is trained on this process)

Do you recall that you are the primary person who is responsible for "everything else" in the company? Taking the responsibility to monitor the Team Lead Generation System Checklists and to complete the Team Monthly Lead Generation Report is the primary way to impact the business and enhance the profits. Doing this consistently is a key enhancement for the lead generation systems and will allow you and your team to intelligently monitor the results and determine the effectiveness of the systems. When enhancing a lead generation system, you can make the greatest impact by a plus and enhancing the details and adding the touches that create a better experience for each lead generated. Clearly outlining and scheduling the tasks and details of your lead generation systems is also a critical enhancement to the systems. In completing the Team Lead Generation System Checklist you have already taken this step.

The next page is an outline of a few key enhancement elements that are separated by three categories of lead generation. The majority of these enhancements can be scheduled into your daily routine and may already be in place. Ensure that all details are on your Team Lead Generation System Checklist for maximum results.

Enhancement Tips for the three primary lead sources:

REFERRAL BASED

- Keep database with key details and schedule into calendars important dates such as family birthdays, purchase anniversary dates, etc.
- Know family members names and use in conversations.
- Have email addresses for all people in the database.
- Mail a piece of value monthly to entire database.
- Send hand written notes with personal details as often as possible and at least quarterly.
- Keep your agent/team focused on touching entire database quarterly with calls or drop bys.
- Keep referral source up to date on progress of their referral and ensure they feel valued.
- Provide a newsletter to your entire database at least quarterly.
- Keep updated on community events and provide updates to clients.
- Enhance the experience of each client on daily basis.
- Connect via social online communities like Facebook etc.
- Ensure emotional bank accounts are full for both internal and external clients.

DIRECT CALL BASED

- Develop and stock customized Pre Listing, FSBO and expired kits. Ensure these packages are delivered within 24 hours of lead contact.
- Keep "brag" sheets on your statistics readily available and support your agent/team prospecting by mailing this to contacted clients.
- Collect data from MLS, newspapers, web sites or other sources immediately upon starting work. This needs to be your first priority of the day!
- Have value pieces going out to this database often and on a consistent basis. Schedule time to develop pieces and track results.
- Keep your agent/team energized, focused and motivated to make the calls daily.
- Support contacts made by gathering details whenever possible.
- Gather daily print outs of new listings to support expired campaigns.
- Obtain calling lists from title companies when possible and ensure they are cross referenced to the Do Not Call list.
- Know how to search for phone numbers in the tax roll, CD programs, 411, internet, etc.
- Keep website and media sites up to date and relevant.

INBOUND CALL BASED

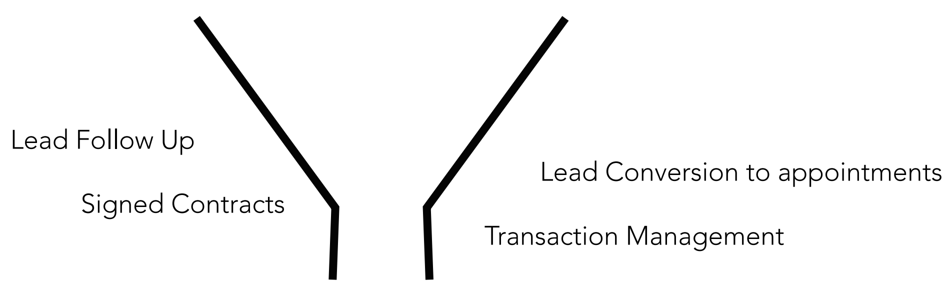
- Keep detailed calendars on all advertising schedules. Schedule in advance time for development, design and editing.
- Review all material for call to action tag lines and brand/image. Ensure they are congruent.
- Monitor marketing budget or ensure this is being done.
- Keep a marketing binder with EVERY piece or ad that is run.
- Keep a file of "marketing information" to reference when creating marketing pieces.
- Utilize free press releases whenever possible.
- Mail your Just Listed/ Just Sold cards to your farm as well as surrounding areas.
- Use email as a cost effect tool for marketing properties, events and your team.
- Import any internet site leads into your database daily.
- Gather key information for your agent/team when lead calls in.

Enhanced Lead Follow-Up

As we have reviewed in the past, leads are the future business for the CEO Agent and the team. Up to this point we have focused upon getting clarity on your lead generation sources, how everyone impacts them and the steps you can take to enhance them. Moving forward, we want to ensure that you have the skills and tools to support the conversion of leads into appointments and transactions and PAYCHECKS!

On a daily basis, you are working on lead generation and lead conversion, which are the two most important activities for the growth of any sales company! In many cases, a CEO Agent is doing this primarily on their own and utilizing the team talents and skills once a contract has been taken, such as a listing, buyer broker agreement or sales contract. From that point forward your team is usually the primary contact and creates the Raving Fan experiences for the clients that generate increased referrals. In any highly profitable business, the CEO is responsible to ensure that the FUNNEL is full of systems that great people implement. In your real estate business YOU ARE THE CEO!

LEAD GENERATION



CLOSED TRANSACTIONS

Each of these structures must be done for a proper funnel to produce paychecks. As the CEO agent it is vital to the success of you and your team that you take full responsibility to ensuring that each structure is strong, solid and being done by the best possible team member.

CHAPTER FIVE
IT'S ALL ABOUT THE LEADS, BABY

The primary way to enhance lead follow-up is by knowing which HOT LEADS you and your team are working with at any given time. Below are the 10 most important tools to ensure that you and your team are actively involved with lead follow-up and impacting lead conversion for the team.

1. Obtain your agent's HOT LEADS list at least weekly and follow up on the status of past HOT LEADS. (There is a form in this workbook if your agent does not currently have a simple tracking system in place.)

2. Confirm all lead appointments on the phone at least 24 hours prior to EVERY appointment.

3. Ensure that every HOT LEAD is inputted into your database system and that all the critical information (top of Creating Raving Fan Checklist) is in the database. If the information is not complete, call the HOT LEAD and obtain that information from them for the database.

4. Send a hand written notecard to every HOT LEAD once they have had contact with the agent/team. Ensure that a thank you card is sent after every appointment as well. Include a business card with each notecard

5. Ensure that all leads are included in all marketing databases. This will assist in cultivating leads that may not be ready at this moment to buy or sell.

6. For HOT LEADS have your assistant call and introduce themselves just as you would for a new client. Let the HOT LEAD know that you are excited about working with them in the future.

7. Have pre-appointment packages delivered at least 24 hours prior to appointments. (This is separate from the notecards and appointment confirmation calls.)

8. Print out a master HOT LEADS report monthly and have your team review, eliminate and add as necessary. Make the adjustments to your database and marketing lists monthly.

9. Bring a level of excitement to both the HOT LEAD and your team about the new business opportunity.

10. Produce leads for your team by ensuring all of your teams' Center of Influence are aware that you worked on a great real estate team and that they are being included in the marketing aspect, as well.

The most important step you can take is to be involved with lead generation and conversion. Review and define the process specifically to your agent/team, write the process out and include it in your administrative journal.

HOT LEADS

Week of:________________________

SELLERS

1. ______________________________
____
2. ______________________________
____
3. ______________________________
____
4. ______________________________
____
5. ______________________________
____
6. ______________________________
____
7. ______________________________
____
8. ______________________________
____
9. ______________________________
____
10. ______________________________
____

BUYERS

1. ______________________________
____
2. ______________________________
____
3. ______________________________
____
4. ______________________________
____
5. ______________________________
____
6. ______________________________
____
7. ______________________________
____
8. ______________________________
____
9. ______________________________
____
10. ______________________________
____

Lead Conversion Scripts for Administrative Staff

CALLING TO ESTABLISH RAPPORT AND OBTAIN INFORMATION

1. Hi (name), this is ____________ with _____________ office how are you today? GREAT!

2. I wanted to touch base with you and let you know how excited we are to have the opportunity to assist you with __________ (buying or selling) a home.

3. Here at _____________(agent/team) office we are always working on enhancing our customer service and ensuring that we do that. I would like to gather some information, is that ok? GREAT! (get what you need).

4. I would also like to ensure you have all of our information. (Provide office phone, fax, email and address unless they have it.) You will also receive information in the mail from us, is that ok? GREAT!

5. Thank you for taking the time to provide this information to me and I look forward to working with you!

6. ________ (lead name) is there anything further I can do for you right now? No, ok have a great day and again ________ (agent/team) and I look forward to working with you!

CONFIRMING APPOINTMENT CALLS

1. Hi (name), this is ____________ with _____________ office how are you today? GREAT!

2. I am calling you on behalf of __________ (agent/team) to confirm your appointment on __________ (date) at _________ (time) at ____________ (location). Do you have any conflicts with that? No GREAT! (if so have agent call ASAP)

3. I know that ___________ (agent/team) and I are looking forward to assisting you on ________________ (buying or selling) a home and ensuring you have a great experience in doing it.

4. ________ (lead name) thank you for confirming the time with me, is there anything further I can do for you right now? No, ok have a great day!

SCRIPT FOR STAFF COI REFERRALS

1. Hi (Name), this is _______, now with (team/agents name)… how are you today? Excellent!

2. I was following up to make sure you received my announcement letter. Did you see it? Great!

3. Thanks so much! I'm so excited to be active in real estate… and of course to be associated with (team/agents name)… it's so great!

4. (Name)… there are so many agents in this business that just don't provide the level of service they should, it's scary! Don't you agree?

5. So, are you okay with me adding you to our preferred client mailers? Wonderful!

6. Periodically, I or (agent) will be contacting you to see if there's anything we can do for you… or… if you know someone that needs a great real estate agent (Name) we receive a lot of referrals… and we'd love it if you'd refer us as well okay?

7. (Name) I'll let you go… thanks so much for your time… have a great day!

TomFerry

tomferry.com
888.866.3377