



I'M NOT SURE I HAVE THAT "FUN
MOM ENERGY" 😊



withididorealtor

I LIKE HAVING A
HOUSE, BUT
I LOVED LOOKING FOR A
HOUSE,

BUT THE REST IS ON POINT

*In our industry...
the vast majority work
because they have to.
They've worked for decades
and retire broke.*

Americans with No Savings

56% of Americans (117M adult Americans) don't even have **\$1,000** savings for an emergency.

Instead, they turn to credit cards in times of need.*

*Note: A telephone survey of 1,004 American adults conducted in January 2022.

Source: Bankrate





***Average household net worth = \$121,411**

***15,298,070 households (about 11.8%) have \$1,000,000 or more net worth**

***The top 10% of household wealth started at \$1,219,126**

The top 5% of household wealth started at \$2,584,130

The top 1% of household wealth started at \$11,099,167

*Survey results collected from February, 2019 - April, 2020 from the [Federal Reserve SCE](#). This is the most recent data in 2021.

THE HIERARCHY OF FINANCIAL NEEDS

Like **Maslow's hierarchy of needs**, financial needs are categorized according to stages...

BUILDING A SOLID FOUNDATION centers on moving through each stage of the ladder.

Below, we illustrate how these stages provide essential lessons in both creating and retaining wealth.



From investing to tax planning, wealth management plays an important role in financial health.

If I had one regret...
it would be...

*"I wish I'd lived more
simply... and bought
more real estate."*

My goal is, you don't
have my regret...

Tom





**My Massive
Transformative
Purpose:**
**“Turning 10,000
aspirations into
financial freedom”**



Tom J



*"Empowering 10,000 clients to **create financial freedom and realize their dreams** through education, discipline and sustainable investments."*

3 reasons why **YOU** should **JOIN ME**

1. There's **VERY** little **COMPETITION**.
2. You're **ALREADY** in the **PERFECT** Industry & position to **DO IT**.
3. You're only **ONE DECISION** from **GETTING FURTHER AHEAD!**

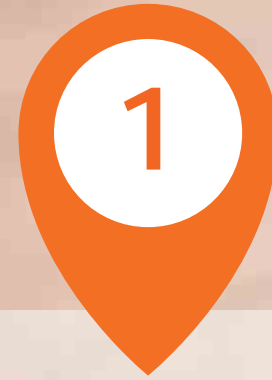


I want you to
be wealthy!



Why most people will never become rich

The MISTAKES to AVOID



***You haven't
defined it!***



*“How do I define
wealth?”*



*“Our Cash Flow
Covers Our Expenses
& Lifestyle!”*

Where to start:

1. **DECIDE** on a 10-to-20-year vision for your life. *(permission to dream big!)*
2. **CREATE** a *(future state, "best guess")* monthly budget for our future lifestyle.
3. **DEVELOP** a plan to generate the cash flow over time to cover the costs.

Action:

4. FOCUS your plan around.

- Rental property income.
- Income from retirement accounts.
- Income from dividend-producing stocks.
- Income from treasuries or bonds.
- Income from businesses I (co)own.
- My other sources.

"No one's going to save you. This is on you."



Most people self identify
as someone who can't
be wealthy



“You don’t understand my situation...”

“You don’t know my family...”

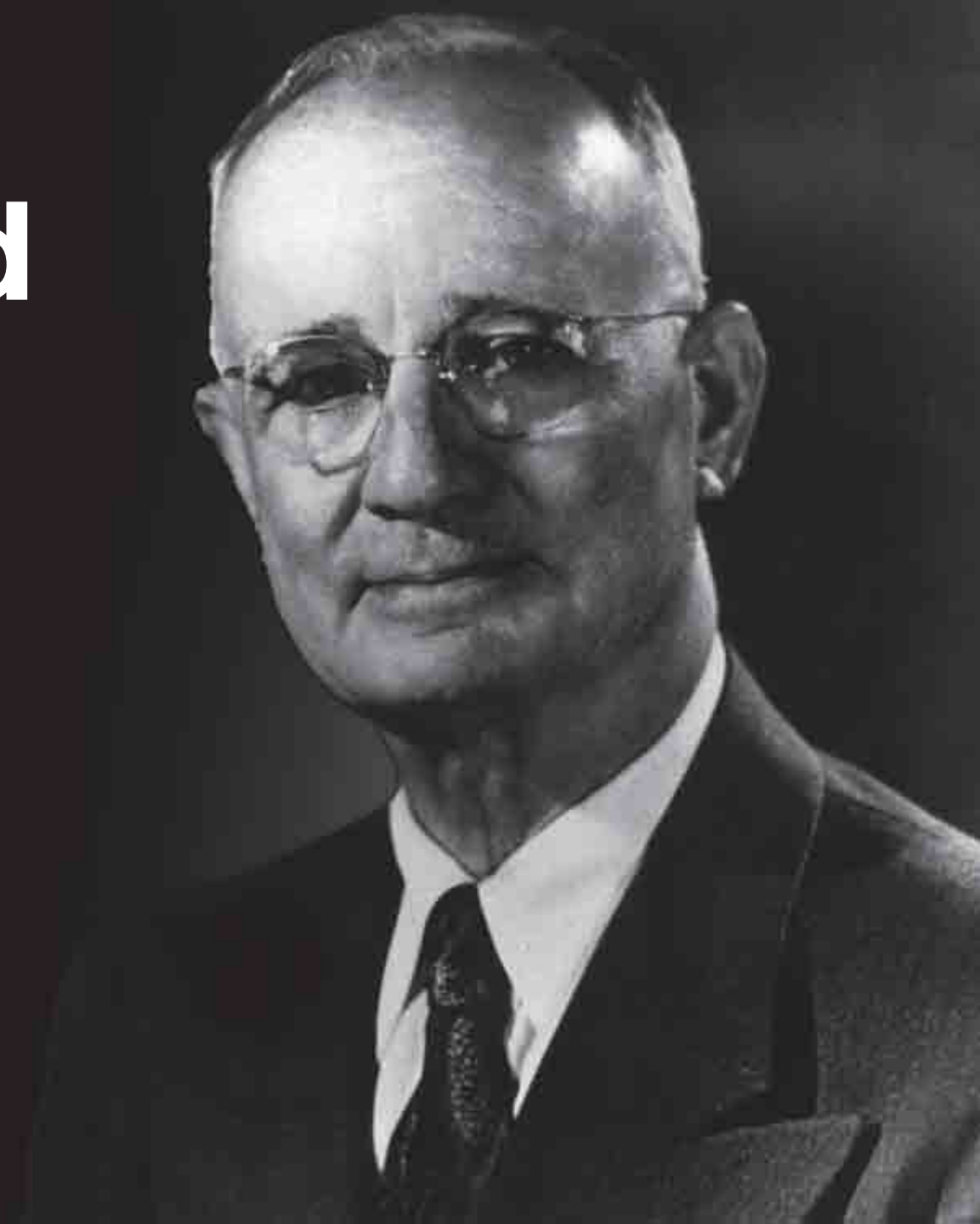
“You don’t understand, in my market...”

“I don’t know anyone who...”

“I’m too (fill in the excuse)”

**“What the mind
of man can
conceive
and believe he
can achieve”**

— Napoleon Hill



*“A Wealthy Mindset is
DEVELOPED From Education
& Exposure to People
Doing More Than Me.”*



3

They don't ask for help.
Or worse, they ask the
wrong people.



6 Relationships to Cultivate...

1. **A TAX ADVISOR** – Taxes & tax strategy
2. **AN ATTORNEY** – Legal strategic thinking partner
 - Don't forget your trust attorney
3. **A FINANCIAL PLANNER** – Insurance coverage
4. **MONEY MANAGER(S)** – Who manage equities - portfolio
5. **A BANKER & MORTGAGE PARTNER** – To battle over your mortgage business
6. **MENTORS** – To run ideas past and learn from experiences

4

**Too much time in the wrong rooms,
having the wrong conversations,
with the wrong people.**

(Fear & intimidation of wealthy people!)

6 More Actions to Consider...

1. Get to know more small & mid-size Business Owners in your city
2. Develop relationships w/ owners of small and mid-size rental portfolios
(they all want to know & learn from each other – You can facilitate this)
3. Join a club or two where more of the “wealthy” spend their time
4. Start or join a mastermind *(our ecosystem)*
5. Join a local investment club
6. Identify the top 10 wealthiest people in your city
 - Get to know (one of) them
 - Find out what they're passionate about, support their cause
 - Bring them opportunities “I'm not sure if this is for you, but, I just came across...”

*“It Only Takes
1 Action to Get
You Started”*



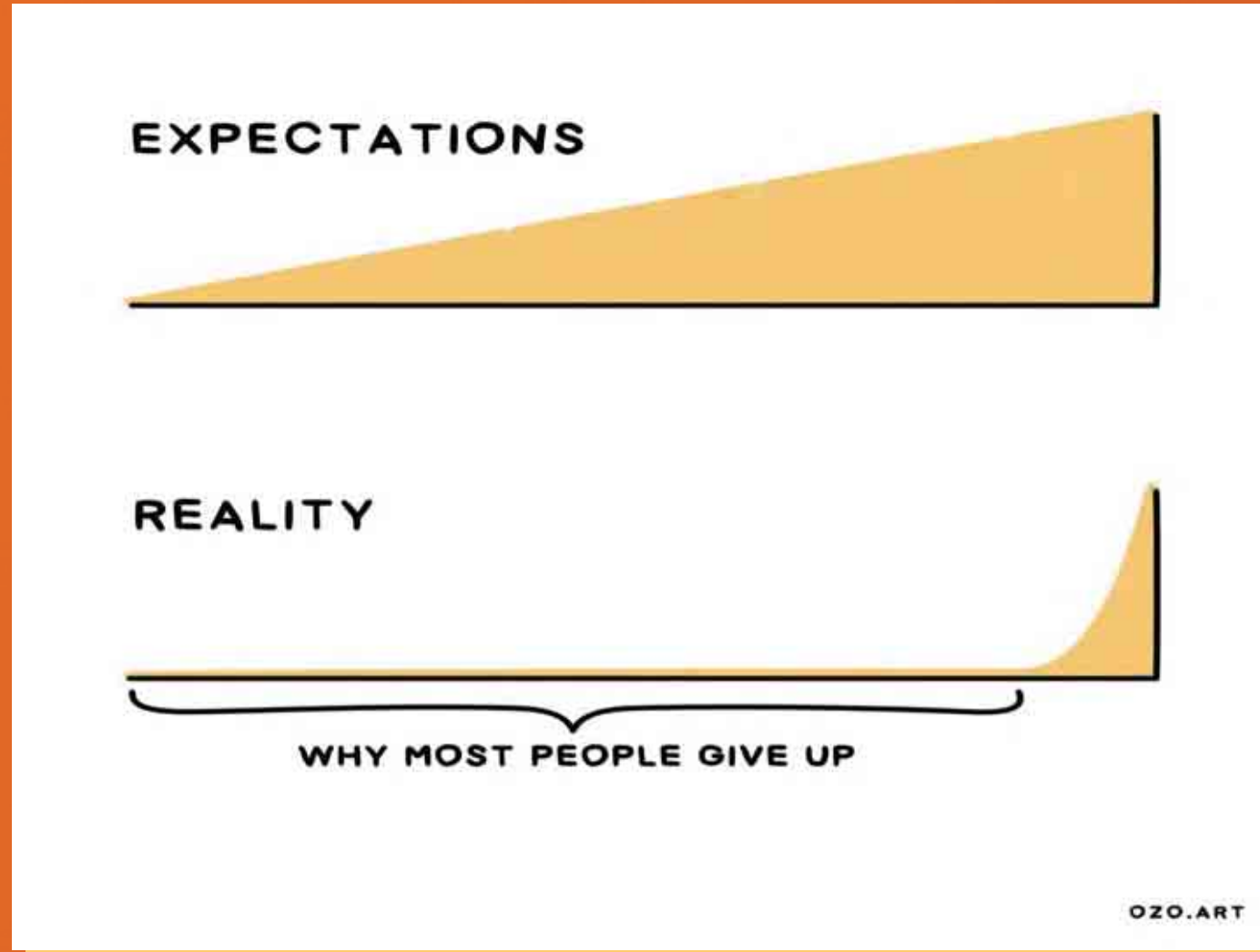


They Chase Fast Money!

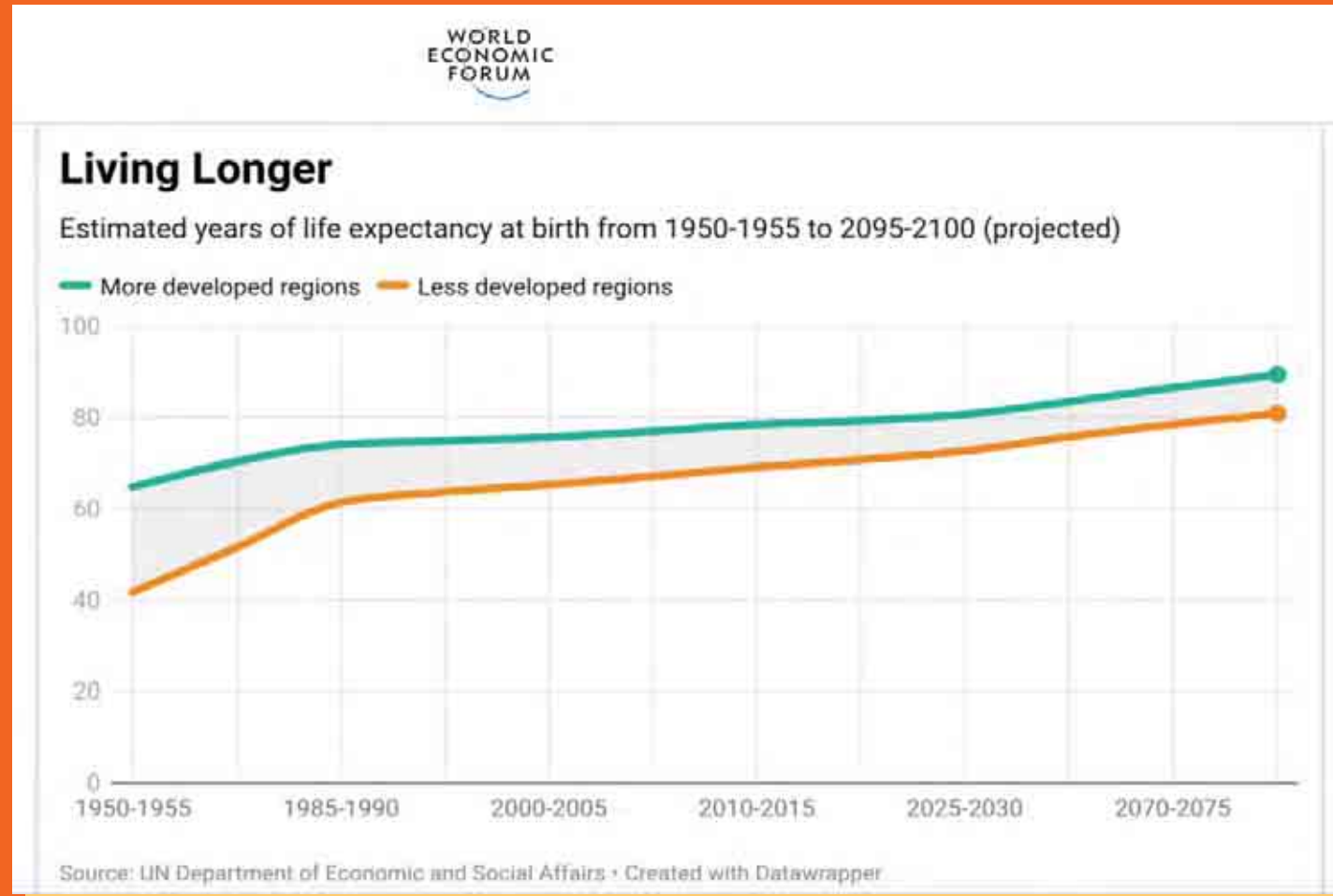
*(Most will never be wealthy
because they fail to play
the long game)*



Creating Wealth and Cash Flow...



Good news... We're living longer...





Most will never be
wealthy because
they're unwilling
to sacrifice





The Average Agent...

Only makes their calls when they feel like it

Spends little time analyzing their marketing campaigns

Complains about how they "hate social media"

Does not reinvest a % of commissions back into marketing

Is "too afraid" to get on camera

Expects their SOI to stay loyal

Blames interest rates for their declining production

Top performers do the exact opposite

***“What am I willing
to sacrifice, to do
consistently for as long
as it takes, **in order to
achieve the freedom
I desire?”*****

7

*They Don't Invest in
Enough Real Estate*

Investment Properties

1. Decision: alone or in partnership(s)?
2. Buying “plexs” where there’s less competition + traditional financing available (vs larger unit buildings).
 - 2, 3, 4 doors in one purchase. Buy, wait, refinance, cash out, repeat.
3. Buying SFRs w/ a clear path for price appreciation + room to increase rents.
 - Attractive for Airbnbs, longer term rentals and resale.
4. Invest in syndications. Same tax, cash flow, appreciation & triggers.
5. Invest in publicly traded REITs.
6. The Brrrr method – Finding fixer properties, Buy, Rehab, Rent, Refinance & Repeat.
 - You can find the deals



The advice for my clients

1. Know my expenses (life and business) vs current cash flow. Get this up and visual!
2. Bank like the top 5%!
3. Cut your fixed costs by 10+%
 - Live off less – stop buying D.S.!
4. Track and measure your dollars rigorously!
Demand a better ROI (*from yourself*)
5. Upgrade the “wealth building team” around you!
6. Invest in dividend producing stocks, treasuries/bonds
7. Invest in more real estate, Plexs, Multifamily, REITs, & Syndications.
8. *Be Patient. Give yourself some grace.*





The advice for my clients

9. Continue to Stockpile Cash!



GENERAL PARTNERS

- TOM FERRY
- ERIC EICKHOF
- JOHN THORNTON
- CONRAD ELLESTAD



PREVIOUS OFFERINGS

COVEST VENTURES

www.joincovest.com



Banyan Cove

125 Units

April 2023

League City, TX



Bayhouse

190 Units

October 2022

League City, TX



Dogwood/Woodcreek

49 Units

August 2022

Tomball, TX



Pelican Reef

89 Units

April 2022

Seabrook, TX

BEFORE



AFTER



BEFORE



AFTER



WANT TO GET INVOLVED?



TEXT "COVEST" TO 66866

FOLLOW OUR JOURNEY!



@ericeickhof

@jtdoesrealestate

*What am I
committed to?*





Participate in \$100K in 100 Days

Starts Sept!

The planning has been done for you
– are you ready to execute?

SOI / CMAs / SOCIAL MEDIA / EMAIL

Questions?

Thank You

Unpacking The Playbooks: Session 3

Janet Miller + Kristi Jencks

Digital Dominance
Systems That Work

The Playbooks

Listing Attraction Multiplier

The Listing Expert

Referral Pipeline

Breakthrough To Buyers

Digital Dominance


Systems That Work





A Process for Standardizing Processes

Jamie McMartin

 @thejamiemcmartingroup

 **Houston, Texas**
PRIMARY MARKET

 **17 YEARS IN REAL ESTATE**

2022 PRODUCTION STATS

565

TRANSACTIONS

\$264m

SALES VOLUME

\$4m

GCI



BY THE NUMBERS

21

Sets of SOPs in operations library

4

Departments represented with SOPs

100%

Increase in efficiency as a result of SOPs


TEAM STRUCTURE

- ✓ 26 agents
- ✓ 9 staff members



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Jamie's TOOLKIT

Listing Process SOP – Agent

The Jamie McMartin Group's listing process for agents.

Listing Process SOP – Leadership

The Jamie McMartin Group's listing process for leadership.

Listing Process SOP – Listing Coordinator

The Jamie McMartin Group's listing process for the listing coordinator role.

Listing Launch Project Trackers

Action items for listing launch found in Asana and Slack.



A Gifting System for Reviews and Referrals

Brennen Clouse

 @Brenthebroker

 **Seattle,
Washington**
PRIMARY MARKET

2022 PRODUCTION STATS

109

TRANSACTIONS

\$102m

SALES VOLUME

\$1.2m

GCI

Brennen's 3 Action Items

FOR SUCCESS

1

Familiarize yourself with the gifting concept as presented in John Ruhlin's book, Giftology. (Or listen to Tom's podcast with John.)

2

When building your system, start small with what's manageable, maybe something as simple as the "All About You" intake form for all new clients.

3

Think ahead and determine who can run your system once it's developed.



THE STRATEGY



HAVE A VISION

- Brennen envisioned a gifting system that would result in 5-star reviews.
- It would be scalable because every tool and process would seamlessly interconnect.

USE TECHNOLOGY

- He created an “All About You” client intake form, hosted on Airtable, and included a bit.ly link to it in their buyer consultation follow-up email. In bit.ly, every team member can easily access it. The form helps them gather all relevant client preferences and needs to personalize their gift selection.
- By ordering gifts directly from Amazon, Brennen ensures quick and efficient delivery to his clients. Furthermore, the use of gift notes enables clients to respond with a thank you note, fostering a sense of gratitude and appreciation.
- He can also source moving boxes and supplies through Amazon.
- He provides personalized Buyers Guide notecards for each team member. The notecards include a prompt for the client to leave a review. FedEx Office prints the notecards in batches of 50.

DEVELOP PROCESSES

- The agent and other team members complete a New Contract Gifting form. It is then sent to their virtual assistant (VA) who handles ordering all the gifts.
- For the moving boxes, a kit is chosen from Amazon. The boxes are accompanied by a congratulatory script personalized with the agent’s name, adding a personal touch for each client.
- Seven days before closing, they send Crumbl Cookies to the client with a note that reads, “Looking forward to a sweet close!”
- Finally, they send a personalized closing gift based on the interest or hobby the client shared in the “All About You” form.
- They also gift monthly subscriptions to maintain ongoing connection with clients.
- Finally, they send a standardized email to nudge the client toward giving a review.



Creating a Video-First Organizational Culture

Chris Ristau

@e3.realty

Bay Area, Silicon Valley, California
PRIMARY MARKET

14 YEARS IN REAL ESTATE

2022 PRODUCTION STATS

72

TRANSACTIONS

\$52m

SALES VOLUME

\$1.2m

GCI



BY THE NUMBERS

275

Videos produced by brokerage per month

\$12,000

Monthly budget for video production entire brokerage (2023)

10X

ROI on video

\$50,000

Investment for studio build

\$305,000

Total expense outlay (2019-2022)

\$3,372,000

Company retained dollar (2019-2022)

Production Year	Agent Count
2019	15
2020	22
2021	31
2022	44



THE STRATEGY



TRAINING AND RECRUITING

- It took around two years for Chris and his team to develop their current training playbook.
- As part of their interview process, they record candidates to see whether they're comfortable in front of a camera.
- Many agents are initially hesitant to start creating videos of themselves. It can take up to six months for agents to become consistent and confident in their video production skills.
- They won't hire some agents because they have an aversion to video. They wouldn't be a good cultural fit.
- To determine what should be included in their training program, they researched what agents are looking for and identified their major concerns.

PROVIDING AGENT SUPPORT

- Nine virtual assistants (VAs) cover a range of fields
 - Manage social media posts, graphic design, and editing
 - Help with their CRM (kvCORE) management with such tasks as tagging and setting up follow-up campaigns
 - Facilitate the creation and sending of monthly email newsletters
 - Design graphics, including social media posts for the brokerage, team, and individual agents
 - Write content
 - Develop landing pages and funnels
- Two in-house video editors edit brokerage, team, and agent videos. To manage the workload, they use Monday.com for project management.

Correlation between videos produced and sales volume last 5 years –



Production Year

2018

2019

2020

2021

2022

Videos Produced

0

50

123

279

407

Sales Volume

\$14M

\$23M

\$65M

\$102M

\$155M

Ben's TOOLKIT

Top Performing Posts

Collection of Ben's top performing videos on TikTok and Instagram

VA and Video Editor Checklists

Checklist of the video and editor's responsibilities loaded into Asana

Recruiting Presentation

Agent recruiting presentation for the Ben Lalez Team.



Scale Your Videos to Scale Your Transactions Ben Lalez

 @thebenlalezteam

 **Chicago Metro,
Illinois**
PRIMARY MARKET

 **12** YEARS IN
REAL ESTATE

2022 PRODUCTION STATS

400

TRANSACTIONS

\$155m

SALES VOLUME

\$3.54m

GCI

Adjustments

- ✓ Support
- ✓ Systems
- ✓ Skills
- ✓ Schedule



3 Step Plan For Growth

AWARENESS

Imagine What If . .



ADJUSTMENTS

Support, Systems, Skills, Schedule



ACTION

Goals and Process



The Plan

What does **success** look like?

What's the **90-day goal**?

What do we need to **track and measure**?

What's the **first step**?





Event Marketing for Agent-to-Agent Referrals

Liz V. Abreu

Being the Community Sponsor

Ryan Adams

Transfer Your Skills to Your Team

Jill Biggs

Relocate at Baby's Hair

Courtney Robinson

Treating Open Houses Like Art Exhibits

Carl Ann Carter

Right People, Right Roles, Better Goals

Lisa Chinnelli

A Gifting System for Reviews and Referrals

Brennen Clouse

Knowledge Broker, Not Your Guide

Sarriene Comstock

Nothing Short of the Best is the Way to Win

Randy Courtney

Put Your Brand into Words

Candee Deichman

Specializing for Special Needs

Tony Fecah

Aligning Your Team in Capturing & Serving Buyer Leads

Bekky Garcia

Personal Brand for Professional Success

Shannon Gibatte

Appealing to Buyers in the Big Apple

Jay Glazer

Building Trust and Rapport from Beginning to End

Chris Grant

SOPs to Eliminate Decision Fatigue

John Harrison

Specializing in Luxury Referrals

Jenny Hart

Never Be in Cold

Jacqueline Hill

A 36-Point Contact Plan for Referrals

Elton Kokot

Strategic Long-Term YouTube Content for Nationwide Business

Juan Ruitza

Preparation for Successful Prospecting

Kacie Jenkins

Creating Educated and Informed Buyers from the Start

Liz & Jeff Johnson

The Three-Part Buyer Conversation that Gets the Signature

Teresa & Paul Kadiak

Worldwide Recognition from Community Presence

Elena Kimble

Scale Your Videos to Scale Your Transactions

Ben Lalez

Sustainable Giving, Commitment, and Communication

Kicole Rabbat Levine

Lawless Business from Attorneys

Laurie Nestrec

Digital Branding for Personal Freedom

Shannon Nario

Instagram Engagement for Long-Term Success

Diana Ptachyn

A Process for Standardizing Processes

Jamie McMartin

Bring the Most Everyone Wants to Have

Brian Nixford

A Small Fee to Pay

Mark Paltzoff

Brand Your Deliveries to Deliver Your Brand

Karen Peters

Presiding the Real Estate Knowledge Network

Nikki Ramey

Data-Driven Decisions for Profitable Victory

Scott Reynolds

Creating a Video-First Organizational Culture

Chris Ristau

Crafting SOPs for Everything

Sja Sileo

Finding Your Video Groove

Jenny Smith

Creating Abundance Through Nonconditional Living

Jennifer & Geoffrey Tackney

Mastering Google Ads to Fill the Sales Funnel

Jenny & Charles Turner

Mastering Google Ads to Fill the Sales Funnel

Jenny & Charles Turner

The Training & Tools of a Listing Expert

Stephane Younger

Event Networking for Agent-to-Agent Referrals

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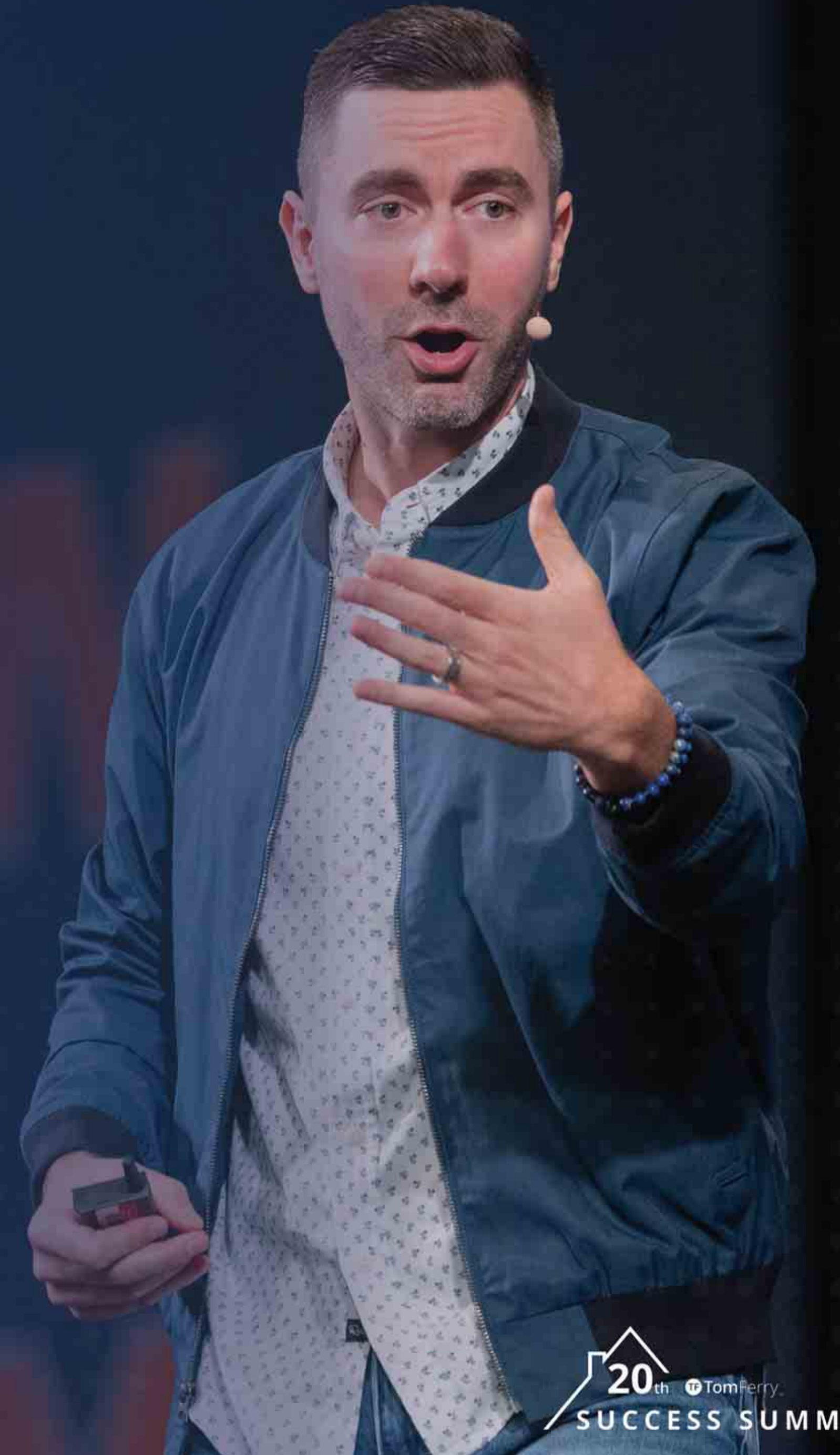


@jasonpantana

BOT COMMANDER

MASTERING THE ART OF SMART PROMPTING

@JasonPantana



Generative Pre-Trained **TRANSFORMERS**

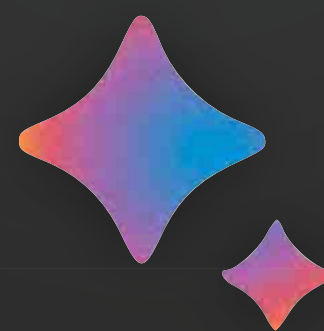


LARGE LANGUAGE MODELS

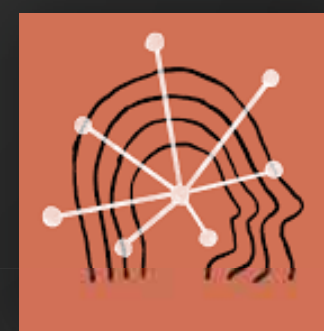
AI systems that can understand and generate text, simulating human-like conversation.



ChatGPT



BARD



Claude 2

SPECIALTY-TRAINED AIs

 Jasper

 Writesonic

 Rytr

 Copy.ai

 Grammarly

 Notion

 Anyword

 Writer

 Tom AI



We are exiting the
age of *HOW?* and
entering an era of
WHAT? and *WHO?*



Tom J

AI JOB MARKET

← Google Nashville, TN

Jobs Saved Alerts

Title Location Date posted Requirements Type Company type Employer [Send feedback](#) [Learn more](#)

All Engineer Engineers Engineering Data scientist Design engineer Engineering associate Learning engineer Professor Research scientist Software engineer Solutions engineer

Brain POP Prompt Engineer (Greater NYC Area, NY or Remote)
BrainPOP
Anywhere
via Built In NYC
\$ 115K–130K a year Work from home
 Full-time Health insurance Dental insurance

KTeam Ai Prompt Engineer (Remote)
KTeam
Anywhere
via Pangian
4 days ago Work from home Full-time
 Health insurance Paid time off

K Prompt Engineer
Kindo
United States
via Indeed
2 days ago Full-time Health insurance
 Dental insurance Paid time off

Prompt Engineering Jobs Prompt Engineers
Forhyre
United States
via Prompt Engineering Jobs
14 days ago Full-time

New job alerts

Prompt Engineer (Greater NYC Area, NY or Remote)

BrainPOP
Anywhere

[Apply on Built In NYC](#) [Apply on LinkedIn](#) [Apply on CareerBuilder](#)

\$ 115K–130K a year Work from home Full-time Health insurance Dental insurance

Job highlights

Identified by Google from the original job post

Qualifications

- Energized by leading Prompt Engineering to tackle and make progress against complex and ambiguous product roadmaps and business opportunities
- Experienced in developing and refining AI models using prompt engineering techniques in the context of generative AI models (e.g., GPT4, Google Bison models)
- Deep understanding of AI, natural language processing, machine learning and AI-generated content development
- Demonstrated technical experience in infrastructure and operations for AI/ML
- Highly motivated to inspire a high profile, high performing team

Responsibilities

- Prompt Engineer will work with AI engineers and cross-functional teams to develop high performance human-centered AI applications in BrainPOP products and operations
- Reporting to the Chief Academic Officer, you will partner with cross-functional stakeholders to help drive learning outcomes and business results

6 more items

Benefits

- Besides offering a comprehensive benefits package and emphasizing work-life balance, we make it a point to integrate fun and play into the workplace

20 Prompted Outputs:

JOB
POSTINGS

BLOGS

SEO/META
DESCRIPTIONS

CHAT
THREADS

OFFER
LETTERS

AD-COPY

PDF
GUIDES

WEBPAGE
CONTENT

AWARD
APPLICATIONS

EMAILS

SALES
SCRIPTS

PRESS
RELEASES

BIOGRAPHY

POST
CAPTIONS

VIDEO
SCRIPTS

LETTERS/NOTES

LISTING
DESCRIPTIONS

TRAINING
OUTLINE

SMS/EMAIL
DRIPS

HEADLINES
& TAGLINES

PROMPTING VS {INSERT}

PROMPTING **VS** ...

 ***WRITING***

 ***DESIGNING***

 ***ANALYZING***

 ***RESEARCHING***

 ***CODING***

 ***EDITING***

**ARE YOU AN
AMATEUR**

OR AN EXPERT?

CHATGPT, OMG 🤯



You literally type whatever you want and it carries out a dialogue with you, just like a text thread. It can output blocks of text, lists, headings, tables, and more. It's a text-generating MACHINE 🤖



PROMPT MAGIC ✨

Persona:	Declare who's speaking.	Ex: "Act as a seasoned real estate agent for home sellers."
Objective:	Define what you need.	Ex: "Compose a guide on tips to improve curb appeal."
Context:	Provide a detailed backstory.	Ex: "The guide is for homeowners planning to sell to increase value."
Format:	Specify the desired output.	Ex: "Create a PDF with numbered lists, visuals, and a summary."
Style:	Refine the manner of speech.	Ex: "Write reassuringly, concisely, and with moderate formality."

“ACT AS”

VS

“IMAGINE”

PROMPT MAGIC ✨

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Prompt-Command Terms:

SUMMARIZE

EVALUATE

SPECULATE

TEACH

EXPLAIN

COMPARE

ILLUSTRATE

ELABORATE

WRITE

CONTRAST

TRANSLATE

CALCULATE

DESCRIBE

ILLUSTRATE

LIST

SIMULATE

ANALYZE

IDENTIFY

GENERATE

ADVISE

PROMPT MAGIC ✨

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@jasonpantana

THREAD

conversations

THREAD CONVERSATIONS

+ New chat

⚡ GPT-3.5

🌟 GPT-4

Help me pick

a gift for my dad who loves fishing

Come up with concepts

for a retro-style arcade game

Design a database schema

for an online merch store

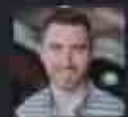
Suggest fun activities

for a family of 4 to do indoors on a rainy day

Send a message 

ChatGPT may produce inaccurate information about people, places, or facts.

[ChatGPT August 3 Version](#)



PROMPT MAGIC ✨

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PERSONA: you're a local real estate agent in Nashville, TN.

OBJECTIVE: help me write a script that can be used when meeting guests at my open house to encourage and persuade them to willingly register on the sign-in sheet.

CONTEXT: often attendees resist or say they're "just looking" or ask if they have to provide information in order to enter the home. It's an awkward moment.

FORMAT: One or two sentences (i.e., a script) that can be used to pre-frame the ask (i.e., registering) and circumvent objections before they arise.

STYLE: Write in a professional and conversational voice.

Hey Jason! Great to hear that you're looking to improve your open house game. When it comes to getting attendees to register at the sign-in sheet, try opening with something like, "Welcome! We're so excited to have you here. In order to ensure the security of the property, we kindly ask all guests to sign in. Don't worry, it's just a quick formality and it allows us to keep you informed about any updates or changes related to this home or other similar properties in the future. Now, let's take a look around!" This approach pre-frames the request by emphasizing the benefits and makes it easier for attendees to see the value in providing their information. Good luck!

Revise Answer

PROMPT MAGIC ✨

Persona:	Declare who's speaking.	Ex: "Act as a seasoned real estate agent for home sellers."
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Prompt-Modifier Terms:

CONCISE

ENGAGING

ACTIONABLE

INDIRECT

DETAILED

PERSUASIVE

INSPIRING

CREATIVE

INFORMATIVE

PROVOCATIVE

QUESTIONING

EMPATHETIC

INSTRUCTIVE

FRIENDLY

REFLECTIVE

ACCURATE

PUNCHY

FORMAL

DIRECT

ITERATIVE



@jasonpantana

POWER ⚡ PROMPT

Compose text that is **concise** yet flows smoothly, using the **second person perspective**, **active voice**, and **present tense**. Ensure **clarity** and aim for an **{8th}-grade** reading level, employing **positive language**. When fitting and without overdoing it, weave in **emotions** such as *urgency*, *curiosity*, *desire*, *fear*, *relief*, *exclusivity*, *belonging*, *empathy*, or *excitement*; to enrich the text.

CHATGPT, OMG 🤯

☐

⚡ GPT-3.5 ✨ GPT-4

ChatGPT PLUS

Recommend a dish
to bring to a potluck

Create a charter
to start a film club

Plan a trip
to see the best of New York in 3 days

Come up with concepts
for a retro-style arcade game

PERSONA: Act as a seasoned real estate agent for home sellers.
OBJECTIVE: Compose a guide on tips to improve curb appeal.
CONTEXT: The guide is for homeowners planning to sell to increase value.
FORMAT: Create a PDF with numbered lists, visuals, and a summary.
STYLE: Write reassuringly, concisely, and with moderate formality.

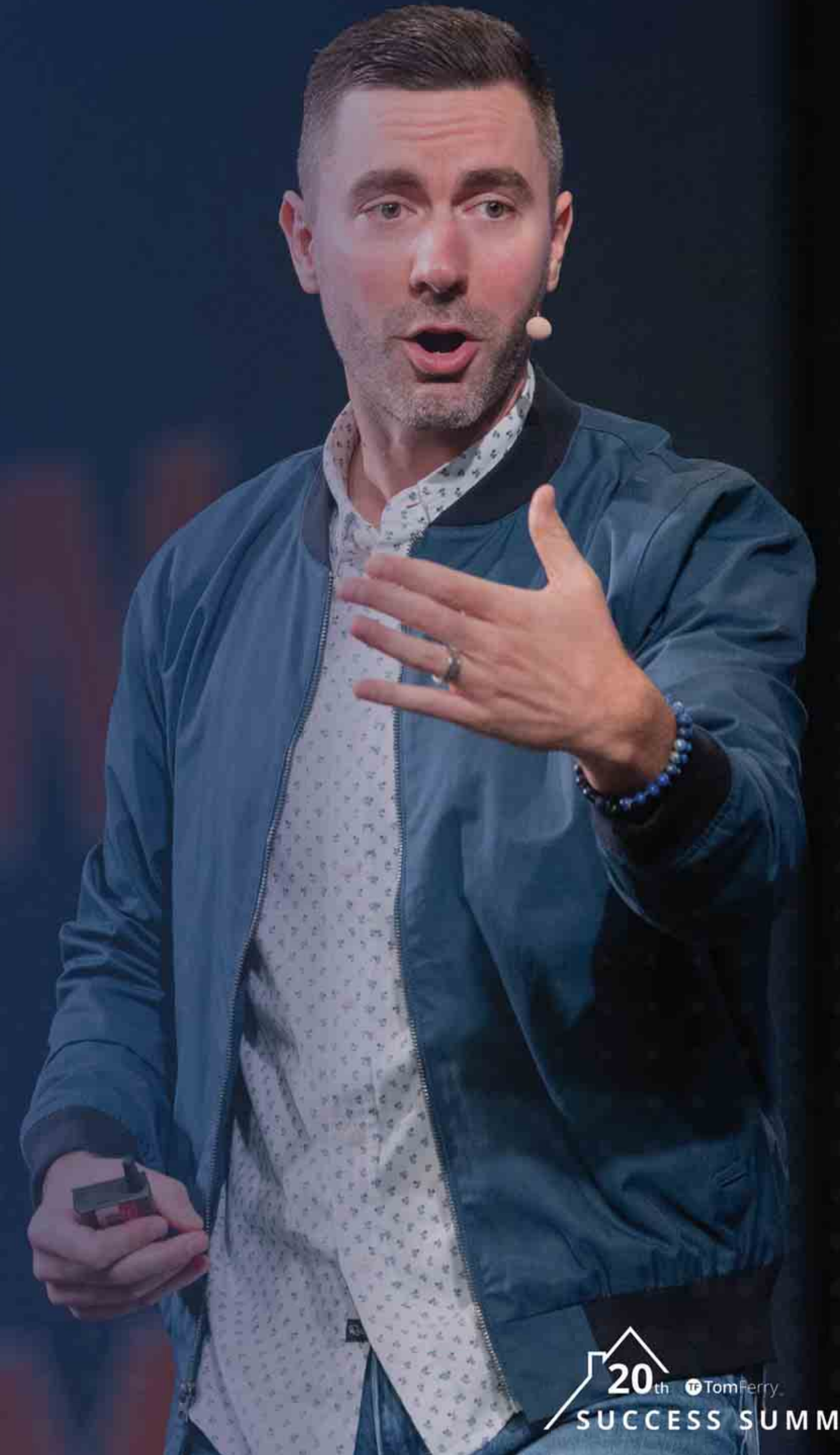
ChatGPT may produce inaccurate information about people, places, or facts. [ChatGPT August 3 Version](#)

Send message

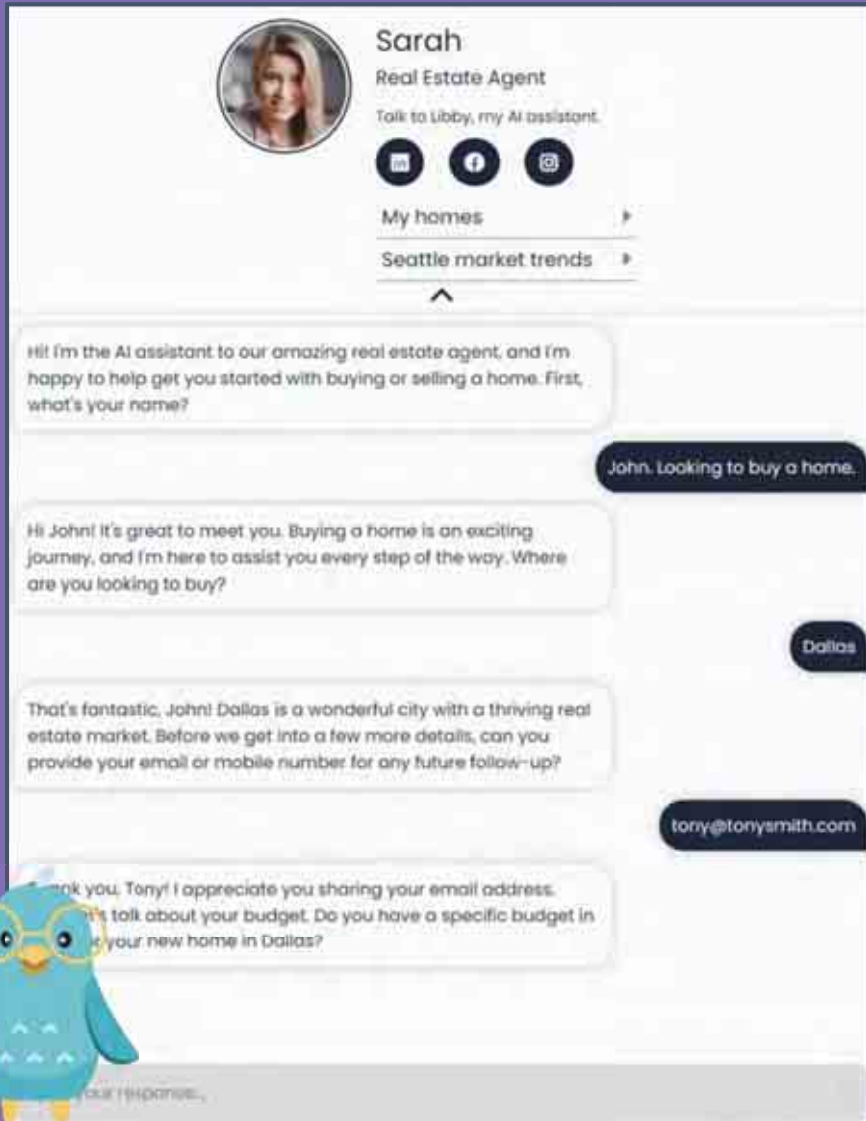
**ARE YOU AN
AMATEUR**

OR AN EXPERT?

@JasonPantana



Secure your heyLibby today!



- Chat assistant for social media
- Founded by Spencer Rascoff (former CEO of Zillow) and other Zillow execs
- Convert social media leads by engaging them instantly and booking them on your calendar.
- **Secure your friendly url (e.g. heylibby.ai/sarah) ASAP**



STOP:

What are my...

- ❖ **Easy fixes to my business?**
- ❖ **Top revenue producing strategies to implement?**
- ❖ **Top decisions to explore with my coach?**
- ❖ **What new tech to explore?**



Event Networking for Agent-to-Agent Referrals

Liz V. Abreu

Being the Community Sponsor

Ryan Adams

Transfer Your Skills to Your Team

Jill Biggs

Celebrate at Every Hour

Courtney Robinson

Treating Open Houses Like Art Exhibits

Carl Ann Carter

Right People, Right Roles, Better Goals

Lisa Chinnelli

A Gifting System for Reviews and Referrals

Brennen Clouse

Knowledge Broker, Not Your Guide

Sarriene Comstock

Nothing Short of the Best is the Way to Win

Randy Courtney

Put Your Brand into Words

Candee Deichman

Specializing for Special Needs

Tony Fecah

Aligning Your Team in Capturing & Serving Buyer Leads

Bekky Garcia

Personal Brand for Professional Success

Shannon Gibatte

Specializing in Buyer in the Big Apple

Jay Glazer

Building Trust and Rapport from Beginning to End

Chris Grant

SOPs to Eliminate Decision Fatigue

John Harrison

Specializing in Luxury Referrals

Jenny Hart

Never Be in Cold

Jacqueline Hill

A 36-Point Contact Plan for Referrals

Elton Kokot

Strategic Long-Term YouTube Content for Nationwide Business

Juan Ruitza

Preparation for Successful Prospecting

Kacie Jenkins

Creating Educated and Informed Buyers from the Start

Liz & Jeff Johnson

The Three-Part Buyer Consultation that Gets the Signature

Teresa & Paul Kadiak

Worldwide Recognition from Community Presence

Elena Kimble

Scale Your Videos to Scale Your Transactions

Ben Lalez

Sustainable Earning, Commitment, and Communication

Kicole Rabbot Levine

Earning Business from Attorneys

Laurie Nestrec

Digital Branding for Personal Freedom

Shannon Nario

Instagram Engagement for Long-Term Success

Diana Ptachyn

A Process for Standardizing Processes

Jamie McMartin

Doing the Most Everyone Wants to Hire

Brian Hixson

A Small Fee to Pay

Mark Paltano

Brand Your Deliverables to Deliver Your Brand

Karen Peters

Prescribing the Real Estate Knowledge Doctor's Best

Nikki Ramey

Data-Driven Decisions for Profitable Victory

Scott Reynolds

Creating a Video-First Organizational Culture

Chris Ristau

Crafting SOPs for Everything

Sja Sileo

Finding Your Video Groove

Jenny Smith

Creating Abundance Through Nontraditional Living

Jennifer & Geoffrey Tackney

Mastering Google Ads to Fill the Sales Funnel

Jenny & Charles Turner

Mastering Google Ads to Fill the Sales Funnel

Jenny & Charles Turner

The Training & Tools of a Listing Expert

Stephane Younger

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Being the Community Sponsor

Transfer Your Skills to Your Team

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Knowledge Broker, Not Your Guide

Nothing Short of the Best is the Way to Win

Put Your Brand into Words

Specializing for Special Needs

Adopt Monkey First Thinking...



Remember, In a Tight
Inventory Market...

Do The Hard Stuff First.



Participate in \$100K in 100 Days

Starts Sept!

The planning has been done for you
– are you ready to execute?

SOI / CMAs / SOCIAL MEDIA / EMAIL

How do I get it done
consistently?



“THIS IS THE WAY”

RE-SET OUR VISION

Shifting focus

"THIS IS THE WAY"

1
out + 3 years out +
quarter. (Qtr by Qtr thru 2024)

(Sample) My 10/3 Year Vision

What do I want in 10 years?

- \$10 mil in commissions
- 25% profit

10 years out:

- The leadership team
business, I lead
advisors

#1

- "So much growth in sales",
"I've completely replaced myself"

In 3 Years

8/2

like?

Variables:

- _____ agents/employees/locations
- Transactions: _____
- Volume: _____
- New Businesses Rev: _____

"THIS IS THE WAY"

Decide: What's My 10/3 Year Vision

What do I want in 10 years?

In 3 Years I want to be like?

10 years out:

#1 Goal

"THIS IS THE WAY"

- Revenue: \$ _____
- Assets: _____
- Liabilities: _____
- ___ agents/employees/locations
- Transactions: _____
- Volume: _____
- New Businesses: _____

Share!

Give your vision life!





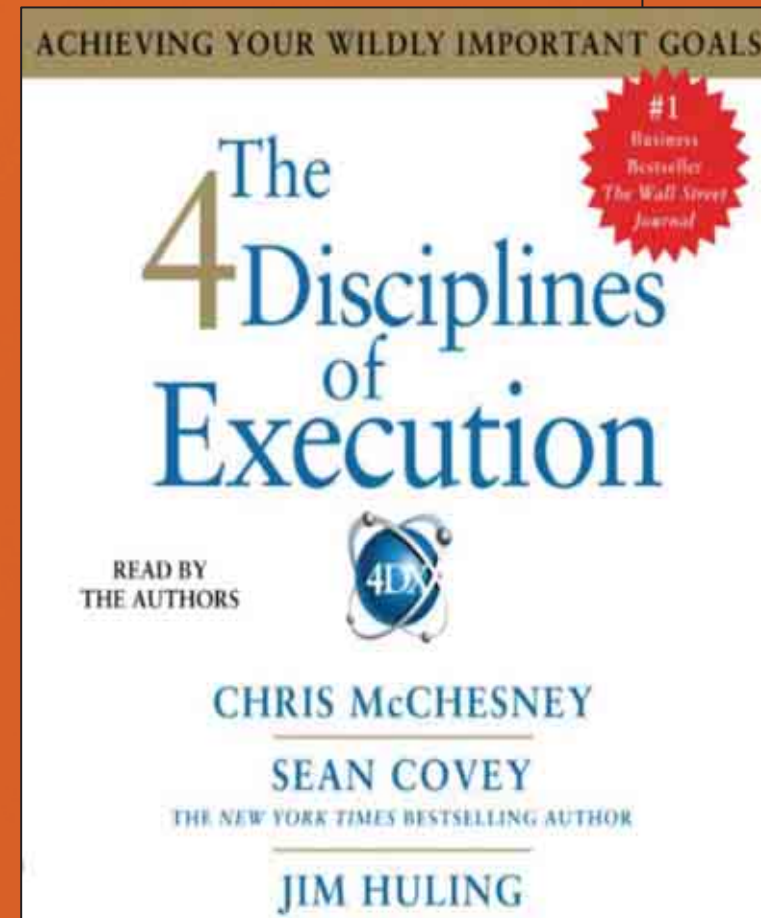
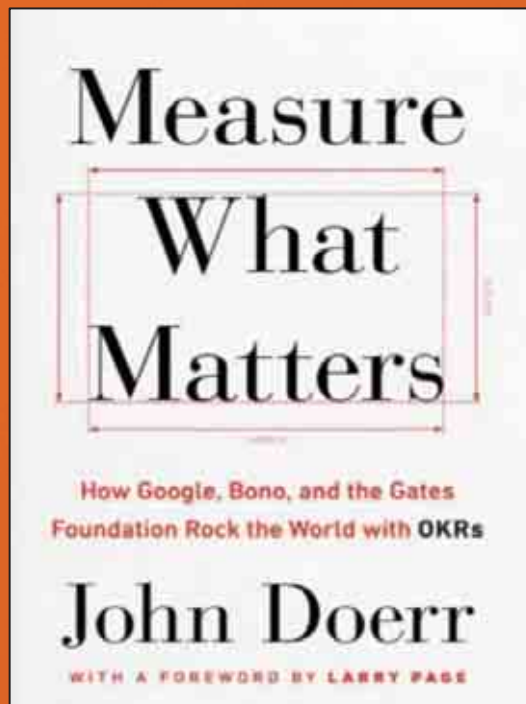
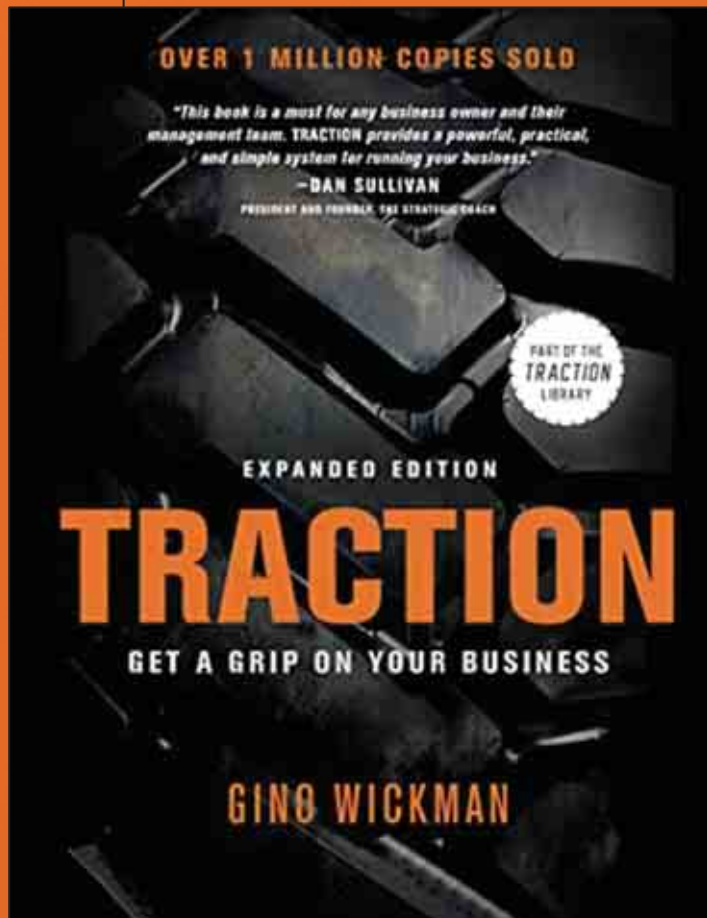
**"Prioritize Until
It's Painful!"**



To dominate in 2023/24.

No more than **3 - 5 PRIMARY**

BUSINESS GOALS PER QUARTER.



What if I focused on
adding 25 (to 500+)
ADDITIONAL LISTINGS
taken annually?



Sample Goals

1. Your Business Results:

- Volume, Transactions Closed, GCI, After Tax Profits

2. Getting More Attention! - Scaling Trust & Likeability

- Reach, Followers, Referrals, Inbounds, Business Opportunities Generated, Recognition

3. Goal for a Bold # of Appointments:

- # of Initial Buyer Consultations
- # of Listing Appointments



2

What are My Top 3 Personal Goals for Q4?

Relationships?

Health?

Spirit?

Savings?

Contribution?




How can we install
MORE STRUCTURE
to the business?



3

“Move it Forward” Meetings

1. Weekly Dashboard Review/Commitments
2. Weekly Marketing Meeting
3. Weekly Sales Improvement Meeting
4. Weekly Coaching Session

A sunset scene with a bright sun low on the horizon, casting a golden glow over a layer of white clouds. The sky transitions from a pale yellow near the sun to a deep blue at the top.

“Remember, we rarely
rise to our goals.

We always fall back to
our **SYSTEMS, STRUCTURE
& STANDARDS.”**



Design my day

1. **A morning routine that fires you up!** – (capture on social)
 - Exercise
 - Mindset – Gratitudes, Prayer, Learning, Check-ins
2. **Office at the same time (Discipline)!** – (capture on social)
3. **Business morning routine**
 - Daily hot sheets – (capture on social – “Did you know?”)
 - Role play
 - 5/5/4/2
4. **Managing your business, transactions, marketing**
– (capture on social)
5. **Going on appointments** – (capture on social)

“Remember, if it’s
not in my schedule,
it doesn’t get
done!”

Tom





*When we measure
performance,*

performance improves

Get all of this UP & VISUAL!
& measure your results to know



***“AM I ON OR
OFF TRACK?”***

↑ PROFITABILITY to 35% - LIST 500 PROPERTIES - ADD 48 AGENTS

SALES	OPERATIONS	MARKETING	RECRUITING	FINANCE / LISTINGS
<ul style="list-style-type: none"> • 4K units, 17M volume. • ↑ conversion by 5% 	<ul style="list-style-type: none"> • Scale for 10 new agents/month • streamline training platform • operationalize conversion 	<ul style="list-style-type: none"> • 2 transactions for every listing • 1% conversion of database • 50 closed deals from social media 	<ul style="list-style-type: none"> • +4 agents per month • +24 legacy agents • 4 recruiting events 	
Conversion Tracking System Training - Lessons Training - Video Support Lead Rotation Management Mentor Training Escalation Plans Visual for bullpen Training System Hire ISA Train ISA	Travel - Onboarding Training - New Agent Training Training - Exp Agent Training Training - All JMC Processes KPI Tracking System Campaigns for Zip codes Cognito Sold.com Google Voice Last Pass ISA System (6) Action Plan - Buyer Under Contract Action Plan - Seller Under Contract Agent checkst / task reminders Close Deal Google Photos	Action Plans Seller rotation Expenses New Construction Lease 1 year Lease 2 year RISE Recruiting Events (24) Buyer Presentation YouTube Ads Google PPC VIDEO Listing Campaign Favorite Deals Professional advice Listing presentation Listing coordination Photo/Video Mailbox Leasing Brokerage Dr. Channing & team/Link Support Team Chasing Lead Listing with agent/agent or Julia open their what you commercial Listings Super vs. Local Ad Divide Seller - Listing, Exp. Seller - Under Contract Buyer - Buyer experience Buyer - Listing of home Buyer - Closing table	Website Goals SE SW NE NW — calls per day — interviews per week @ event	SIV → CTE Tracking System Referrals Legacy Pod Leaders 2025 Budget List to close process refinement supra/sign pick-up client on line email Slack, wait closing Caption vault Listing Coordinator Hire



Jamie McMartin

Jason Farris is dedicated to booking
 appointments by 12/31/16 225 listing

~~21 22 23 22 22 22 24 218 217 216 215 214 213 212 211 210 209 208~~
~~206 205 204 203 202 201 200 199 198 197 196 195 194 193 192 191 190 189 188~~
~~186 185 184 183 182 181 180 179 178 177 176 175 174 173 172 171~~
~~168 167 166 165 164 163 162 161 160 159 158 157 156 155 154~~
~~151 150 149 148 147 146 145 144 143 142 141 140 139 138 137~~
~~134 133 132 131 130 129 128 127 126 125 124 123 122 121~~
~~118 117 116 115 114 113 112 111 110 109 108 107 106 105 104 103~~
~~98 97 96 95 94 93 92 91 90 89 88 87 86 85 84 83 82 81 80 79 78~~
~~75 74 73 72 71 70 69 68 67 66 65 64 63 62 61 60 59 58 57 56 55 54~~
~~49 48 47 46 45 44 43 42 41 40 39 38 37 36 35 34 33 32 31 30 29~~
~~24 23 22 21 20 19 18 17 16 15 14 13 12 11 10 9 8 7 6 5~~

APPTS BOOKED: 205
 APPTS CANCELED: 17
 APPTS GONE ON: 188
 LISTED BY JASON: 143
 LISTED BY BRAND X: 7
 NEVER LISTED: 38
 HERE WE COME 2017
 BE READY!



Jason Farris ▸ TFYC Core+ Private Group

Follow · January 6 ·

I was asked to post my final numbers from my 2016 individual listing appointment goal board here in this group (previously posted in Elite group) - I hope it inspires you. I'm excited for the new year because now I truly know what is possible.

I am over flowing with gratitude! Big thanks to Steve, Tom and the entire TF community.

Like Comment



Re-imagine our dashboard & weekly meeting

3 Departments: No more than 16 #'s that determine **the health of our business**

(sample) Re-Set Our Weekly Dashboard

1. \$ Revenue =
2. Profit \$ + % =
3. Closed Volume =
4. Closed Sales =
5. Pending Revenue =
6. Pending Volume =
7. Pending Sales =
8. Active Listings =

9. A. L. Volume =
10. Coming Soon/Volume =
11. New Leads Generated =
12. New Listing Appts =
13. LA Conversion % =
14. New Buyer Appts =
15. Buyer Appt Conv % =
16. New 4.8 🙌 Reviews =

(sample) Re-Set Our Marketing Weekly Dashboard

1. Web Traffic =  or 

2. New Seller Leads =

- SOI/Clients =
- Mail =
- Email =
- Text =
- Social =
- Google =

3. New Buyer Leads =

4. Appts from marketing =

5. Speed to Contact =

6. Cost Per Appt =

7. # of contacts against marketing =

8. Email newsletter results =

- Open rate =
- Click Throughs =
- Response rate to CTA =

9. Social results by channel =

10. Open House Traffic =

- # of opens =
- # of contacts added =
- # of appts generated =



Scorecard Template

File Edit View Insert Format Data Tools Extensions Help



Share



100% View only


E2 *1/2/2022

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Company Scorecard																
2	WHO REPORTS	OWNERSHIP	MEASURABLES	Weekly GOAL	*1/2/2022	Total	9-Jan	Total	16-Jan	Total	23-Jan	Total	30-Jan	Total	6-Feb	Total	13-Feb
3	<small>*These totals include some 2022 numbers</small>																
4	TC	Team Lead	New Listings Taken		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
5	TC	Team Lead	New Buyers Pending		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
6	TC	Team Lead	Buyers Under Contract (GCI)		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
7	TC	Team Lead	Listings Under Contract (GCI)		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
8	TC	Team Lead	Units Closed		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
9	VA	Sales Manager	Listing Appts. Set		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
10	VA	Sales Manager	Listing Appts. Met		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
11	VA	Sales Manager	Buyer Appts. Set		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
12	VA	Sales Manager	Buyer Appts. Met + Showings		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
13	Operations	Operations	New Agents Hired (Monthly)		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
14	Operations	Operations	Profitability		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
15	VA	Operations	New Leads		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
16	Operations	Operations	Reviews		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
17	Weekly % of Goal Met				0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
18																	
19																	
20	Quarterly Process			Goal	Actual	Quarterly Process			Agent PPP	Q1 goal							

Q1 Scorecard - People Analyzer



Make Data-Driven Decisions!

A sunset scene with a bright sun low on the horizon, casting a golden glow over a layer of white clouds. The sky transitions from a deep orange near the sun to a clear blue at the top.

“Remember, we rarely
rise to our goals.

We always fall back to
our **SYSTEMS, STRUCTURE
& STANDARDS.”**



Quarterly Review & Set New Commitments!



**Show me your routines
and I can predict your level
of success and happiness.**

Tom J





“THIS IS THE WAY”



What commitments am I willing to declare today about **How I plan to run my business, going forward?**



7X DECISIONS:

1. LIGHT THE 
1. FOCUS
1. STRATEGY FOR Ai
1. MY BRAND
1. LEAN OR LARGE
1. LISTINGS
1. CREATE WEALTH!



Thank You
Coaches!



20th **TF** TomFerry™
SUCCESS SUMMIT
THE PATH FORWARD



ELITE RETREAT

Feb 26-27, 2024 | Orlando, FL



Run plays
that work!

Thank You.