



TomFerry

ZILLOW

Premier Agent

Packet

TomFerry.com/ZPA

Goal Setting Activity

2020:

Planning Your Future:

Revenue	Additional Revenue	Total Sales	Profit
Gross Commission Income (GCI)	Income From Other Sources	# of Completed Transactions	Net Commission Income
\$ _____	\$ _____	_____	\$ _____ Revenue - Expenses

2019:

Planning Your Future:

Revenue	Additional Revenue	Total Sales	Profit
Gross Commission Income (GCI)	Income From Other Sources	# of Completed Transactions	Net Commission Income
\$ _____	\$ _____	_____	\$ _____ Revenue - Expenses

2018:

Planning Your Future:

Revenue	Additional Revenue	Total Sales	Profit
Gross Commission Income (GCI)	Income From Other Sources	# of Completed Transactions	Net Commission Income
\$ _____	\$ _____	_____	\$ _____ Revenue - Expenses

Click Here for a **FREE**
Coaching Consultation



CEO REPORT CARD

FOR ALL EMPLOYEES:		NOT AT ALL			SOMEWHAT					INSTALLED	
1	COMPANY VISION IS INSPIRING PERFORMANCE	1	2	3	4	5	6	7	8	9	10
2	COMPANY STRATEGIC PLAN IS FULLY DEVELOPED	1	2	3	4	5	6	7	8	9	10
3	LEADERS HELP PEOPLE ACHIEVE HIGHEST, MOST VALUED CRITERIA	1	2	3	4	5	6	7	8	9	10
4	LONG TERM GOALS DEFINED, WRITTEN, SHARED, AGREED UPON	1	2	3	4	5	6	7	8	9	10
5	SHORT TERM GOALS DEFINED, WRITTEN, SHARED, AGREED UPON	1	2	3	4	5	6	7	8	9	10
6	MONTHLY GOALS DEFINED, WRITTEN, SHARED, AGREED UPON	1	2	3	4	5	6	7	8	9	10
7	MUTUAL EXPECTATIONS DEFINED, WRITTEN, SHARED, AGREED UPON	1	2	3	4	5	6	7	8	9	10
8	JOB AUTHORITY & ACCOUNTABILITY DEFINED & WRITTEN	1	2	3	4	5	6	7	8	9	10
9	MONTH/YEAR RECRUITING & SELECTION GOALS DEFINED & WRITTEN	1	2	3	4	5	6	7	8	9	10
10	ALLIED RESOURCE RECRUITING LIST COMPLETE, UPDATED & WRITTEN	1	2	3	4	5	6	7	8	9	10
11	RECRUITING & SELECTION PLAN WRITTEN & FULLY ACTIVATED	1	2	3	4	5	6	7	8	9	10
12	ANNUAL TRAINING OBJECTIVES DEFINED & WRITTEN	1	2	3	4	5	6	7	8	9	10
13	TRAINING CALENDAR ESTABLISHED	1	2	3	4	5	6	7	8	9	10
14	TRAINING PROGRAMS DESIGNED & WRITTEN	1	2	3	4	5	6	7	8	9	10
15	ALL EMPLOYEES UNDERSTAND & EXECUTE 5-STEP SALES PROCESS	1	2	3	4	5	6	7	8	9	10
16	MARKETING ACTIVITY DEFINED, MEASURED & WRITTEN: GOALS V ACTUAL	1	2	3	4	5	6	7	8	9	10
17	MASTER MARKETING ACTION PLAN WRITTEN & EXECUTED	1	2	3	4	5	6	7	8	9	10
18	REGULAR PERFORMANCE MEETINGS IN PLACE: WRITTEN AGENDAS	1	2	3	4	5	6	7	8	9	10
19	BI-ANNUAL + MONTHLY 1/1 PERFORMANCE COACHING PROCESS IN PLACE	1	2	3	4	5	6	7	8	9	10
20	MONTHLY TEAM MTGS: BRAINSTORM, DECIDE, ACTION PLAN	1	2	3	4	5	6	7	8	9	10
21	INDIVIDUAL RECOGNITION & MOTIVATION: ACTION PLAN IN PLACE	1	2	3	4	5	6	7	8	9	10
22	PROBLEM SOLVING, OUTCOME FRAMING PROCESSES USED	1	2	3	4	5	6	7	8	9	10
23	VISUAL PRODUCTION TRACKING IN PLACE: ON TIME, ON BUDGET	1	2	3	4	5	6	7	8	9	10
24	MONTHLY FINANCIAL EVALUATION IN PLACE: GOAL V ACTUAL	1	2	3	4	5	6	7	8	9	10
25	FINANCIAL BUDGET OPERATING SYSTEM IN PLACE	1	2	3	4	5	6	7	8	9	10
26	ONGOING CASH FLOW MANAGEMENT SYSTEM IN PLACE	1	2	3	4	5	6	7	8	9	10
27	CONSISTENTLY REACHING PROFIT GOALS: ON CRITICAL PATH	1	2	3	4	5	6	7	8	9	10
28	MONTHLY MANAGEMENT ACTIVITY EVALUATION PROCESS IN PLACE	1	2	3	4	5	6	7	8	9	10
29	QUALITY CONTROL REVIEW PROCESS IN PLACE: QA/QC SYSTEM	1	2	3	4	5	6	7	8	9	10
30	CLIENT FEEDBACK PROCESS IN PLACE: CLIENT SATISFACTION INDEX	1	2	3	4	5	6	7	8	9	10



Responsibilities

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____
21. _____
22. _____
23. _____
24. _____
25. _____
26. _____
27. _____
28. _____
29. _____
30. _____
31. _____
32. _____
33. _____
34. _____
35. _____
36. _____

Prioritize Your Strengths

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____
21. _____
22. _____
23. _____
24. _____
25. _____
26. _____
27. _____
28. _____
29. _____
30. _____
31. _____
32. _____
33. _____
34. _____
35. _____
36. _____

Job Description Breakdown

Buyer Agent

Lead Generation:

- 5/5/4
- Social Media
- Website
- Biz to Biz Referrals
- NOD/REO
- Online
 - Zillow
 - Realtor.com
 - Trulia
- Networking
- PC/SOI
 - Nudge/Constant Contact
 - Calls, Text, Follow Up
 - Mail
- Expireds/FSBO
 - Calls, Follow-up
- Mega Open Houses
 - Design & Execution
 - Follow Up
- Farming
 - Door Knocking
 - Mailing
 - YIKES

Lead Conversion:

- 5 Star Follow Up
- Qualifying
- Searches
- Appointments
 - Listing
 - Showing
- Negotiations
 - Closing
- Acceptance
- CRM Management

Client Management:

- Acceptance & Opening Letter/Process
- Contract Time Frame Management
- Lender, Title, Attorney, Escrow
- Inspections
- Contingencies
- Closing, Utilities & Repairs

Short Sale Management:

- Contracts
- Bank Review
- Paperwork Collection; Hardship
- Listing/Negotiations
- Bank Submission
 - HUD Review
- Bank Follow Up
- Bank Conditions
- Approval
 - HUD Review; Addendums; Acceptance

TC/LC:

- Open Contracts
 - Coordinate Contracts; Lender, Escrow, etc
 - Set Up Contractual Items
- Listings Coordination
 - Coordinate Pictures, MLS Input, Showings, etc.
 - Negotiations; Counters; Addendums
 - Acceptance
 - Just Listed Notification
 - Facebook
 - Websites, Zillow, Realtor.com, etc.
 - Mailers, Door Knocking & Calling
- Transaction Coordination
 - Disclosures; Termite; Inspections; Cont Removal; Loan Docs, HUD Review
 - CRM Management
 - Broker Approval
- Closing
 - Recording Notification
 - Coordination of Utilities & Keys
 - Follow Up 5 Days After to Ensure Raving Fan
 - Transfer Client in Database to Past Client
 - Thank You Gift
 - Just Sold Notification
 - Facebook
 - Mailer

Click Here for a **FREE**
Coaching Consultation



Job Description Breakdown

Buyer Agent Continued

Mega Open Houses (MOH):

Neighborhood invites (door knocked)

- Private neighbor only pre-open house
- Hot/Warm lead invite calls
- Set up/breakdown of 50 signs
- Conduct (MOH)
- Create seller report
- Transfer all leads into CRM and 5 star lead follow program

Farming:

- Door knock item of value to farm
- Door knock YIKES piece to specific "hot" neighborhoods
- Door knock "specialty" items for holidays, neighborhood sales etc.
- Transfer all leads into CRM and 5 star lead follow up program

Expired/FSBO:

- Conduct lead generating calls
- Deliver items of value to "connect" to the lead
- Connect using video texting when possible
- Transfer all leads into CRM and 5 star follow up program

Past Client/SOI:

- Adopt BA PC/SOI into team CRM
- Quarterly "touches" from team via Buyer Agent
- Use "hot deal" prospecting opportunity to stay in touch
- Conduct bi-annual client events with ALL team PC/SOI
- Deliver holiday appreciation items

Business Enhancement:

- Hit weekly showing/offer goals weekly
- Conduct daily script and qualify role play sessions
- Conduct weekly presentation practice sessions
- Report schedule weekly for accountability
- Maintain and follow "team" process for follow up, showings, contract writing, acceptance etc.

Showing Property:

- Maintain active HOT client file (ideally paperless) with all pertinent information including; team qualifying info, CRM notes, lender pre-qualification; proof of funds; Buyer representation agreement; deposit agreement and all other key items per team structure
- Show property under the team structure such as: pre appointment preparation; confirmation of appointment; buyer presentation' experience set up; per house "qualification"

Lead Follow Up:

- Conduct a minimum of 2 hours of lead follow up a day for 5 days a week
- Maintain "goal" for touches weekly and track on reporting structure for team leader every Monday
- Maintain HOT LEAD list to review with Team Leader every Monday
- Conduct a minimum of 9 touches within 2 weeks of every initial lead
- Place daily notes on all follow up in the team CRM
- Maintain "showing" reports for team leader every Monday
- Conduct follow up meetings with all lenders for "leads in progress" and report into team CRM
- Stay out of COMFORT ZONE during lead follow up

Click Here for a **FREE**
Coaching Consultation



Job Description Breakdown

Real Estate Assistant

Listing Coordination:

- Prepare all Presentations
- Pre list Process
- Confirmation of Appt
- CMA Prep
- Pre marketing Prep
- Prep net sheet
- Listing Secured
 - Listing Launch
 - Mis Management
 - Photography/Videos
 - Staging
 - Client Prep
 - Marketing Campaign Launch
 - Scrub of database for current potential clients
 - Social Media Launch
 - MEGA Open House Set Up
- Client Preparation and Development
 - Intro Call
 - Showing process confirmation
 - File preparation for brokerage
 - Weekly Updates/Feedback reports
 - Database/CRM Input
- Manage Showings
 - Feedback Structure
 - Comparable updates
 - Coordination of showings
- Offer Acceptance
 - Coordinate completion of signatures
 - Prepare file for Transaction Coordinator
 - Complete brokerage requirements
 - Change status on media sites and MLS

Personal Management:

- Accounting
- Office management
- Manage schedules
- Manage phone calls and emails
- Personal errands
- Keep you ON TRACK

Transaction Coordination:

- Open transaction
 - Intro letter to Escrow, Attorney Title, Lender and other agent
 - Process Info email to Seller with all pertinent data
- Disclosures, inspections, appraisal & other contractual coordination
- Closing coordination
 - Moving Kits/Utilities
 - Funding confirmations
 - Key exchange
 - Closing experience and thank you gift
 - Testimonial/Review collection

Lead Generation:

- Manage ALL Lead Generation Systems
 - Pc/Soi
 - E-newsletters
 - Mailer piece
 - Note card/birthday/anniversary card
 - Farming
 - YIKES
 - Market Updates
 - Newsletter
 - Door Drops/Knocks
 - Expireds/FSBO
 - Call Coordination
 - Delivery campaign
 - Follow up system
 - Social Networking
 - Blog Posting
 - Video Campaigns
 - Mega Open Houses
- Track All leads generated by system
 - Manage CRM
 - Lead Source reports
- Manage all social media development and execution

Click Here for a **FREE**
Coaching Consultation



Job Description Breakdown

Real Estate Assistant Continued

Lead Follow Up & Conversion:

- Assist in 5 Star Follow up plan
- Set and confirm appointments
- Prepare packages
 - Pre List
 - Listing
 - Buyer consultation
 - Showing package

Tracking the Business:

- Lead Source Reports
- DAC
- Production Report
 - Keep up to date and deliver to coach
- Monthly reconciliation report
 - Measure results against business plan
- P&L Report
 - Budget vs. actuals
 - Year over year comparisons

Marketing Management & Execution:

- Lead Source Reports
- DAC
- Production Report
 - Keep up to date and deliver to coach
- Monthly reconciliation report
 - Measure results against business plan
- P&L Report
 - Budget vs. actuals
 - Year over year comparisons

*Please note that there are different regulations at the brokerage and state levels that will determine which activities are acceptable for an assistant. We suggest you review in detail with your manager.

Click Here for a **FREE**
Coaching Consultation



Job Description Breakdown

Inside Sales Agent

Initial Touch:

- Responsible for all incoming leads, phone calls, inquiries, etc.
- Offers enthusiasm and customer service
- Engage in conversation about needs express the agent/team value
- Input client/lead information into CRM and log conversation(s)
- Assign client to team member

Expired/FSBO/NOD's:

- Use scripts to contact lead via phone, email, and regular mail (systems)
- When making contact, qualify the lead in terms of their needs and wants
- Create rapport with the client with continuous follow up to set the Listing appointment
- Attempt to set preview appointment at minimum
- Input all information in to CRM system

Inbound / Outbound Referrals:

- Receive referral paperwork and assigned transferee
- Input information into CRM along with all documented notes/conversations
- Provide follow-up calls for outgoing referrals for status updates
- Provide referring agent with updates regarding transferee
- Follow the referral until closing ensure referral agreement is signed, W9 is provided and information is provided to your TC

Showing Property Prep:

- Assist the BA with setting up appointments and ensuring presentations are readily available.
- Be prepared to show property if leads become overwhelming for the BA or if they are out of the office.

Click Here for a **FREE**
Coaching Consultation



Job Description Breakdown

Inside Sales Agent Continued

Inbound Leads:

- Conduct speed to lead responses, 5 minutes or less via all three types of communication (phone, email and text) if applicable
- If applicable, search property inquired about and search on the MLS and provide lead with the information and set up home search via the MLS for the client
- Use qualifying sheets to qualify lead and obtain all contact information
- Obtain Pre-Approval letter, POF, etc. so lead is fully ready to write an offer
- Move/Assign leads that are ready to transact; otherwise continued follow up
- Conduct a minimum of 9 contacts within a 2 week period via combination of texting, email, calling etc. dependent on the amount of data collected

Past Client / SOI:

- Contact PC/SOI via phone on a quarterly basis to 'check-in', show appreciation and provide market update; inquire about future possible referrals. Setup on email campaign(s)/ newsletters if applicable.
- Update CRM with notes and move/assign client when lead becomes ready to transact
- Ensure current mailing information is correct for Holiday cards, anniversaries, birthdays, etc.
- Deliver holiday appreciation items to clients from current year

Business Enhancement:

- Complete weekly register for accountability/ goal meeting
- High level of customer service to initial touches and all clients/vendors
- Join a weekly role playing call
- Provide bi-monthly conversion rate sheet to leads Executive Assistant
- Provides additional support to Listing Coordinator with scheduling showings and obtaining feedback

Click Here for a **FREE**
Coaching Consultation



Schedule Your

Free Real Estate Coaching Consultation

www.

TomFerry.com/ZPA

- ✓ More Money with Less Stress
- ✓ Proven Systems for Success
- ✓ Multiple Lead Channels
- ✓ Mastering Your Time
- ✓ Getting More Done

Click Here for a **FREE**
Coaching Consultation

