

Welcome to Your Arterra ADVISOR ROADMAP

Congratulations on embarking on your journey as an Arterra Advisor! This roadmap is designed to help you make the transition from simply being a real estate agent, to becoming a trusted advisor, setting you apart in a crowded industry.

The real estate industry is fast-paced and ever-evolving, and success comes from continuous learning, preparation, and execution. This guide serves as a **supplement to our training programs**, offering a **structured self-training tool** that you can reference at your own pace.

Inside, you'll find key insights, best practices, and essential knowledge to help you navigate the various components of being a successful Arterra Advisor. Whether you're looking to refine your skills, gain confidence, or reinforce what you've learned in live training sessions, this resource is here to support you.

Our personal and professional development roadmap consists of 4 levels:

Start (Agent)

This is where every agent begins — building foundational skills and gaining confidence. Start by aligning your purpose, taking action, and embracing growth with humility. Be coachable and focus on gaining traction and understanding the business.

Serve (Advisor)

Focus beyond the transaction. Make the shift from being an agent to becoming a trusted advisor — someone who leads with value, builds deep relationships, and serves clients with integrity and strategy. This is where personal brand, communication, and professionalism elevate their impact.

Scale (Mentor)

Become a mentor for others. You have built something sustainable, and you are now ready to scale your influence. Whether through attracting agents, building a team, speaking, or mentoring others, this role is about legacy, leadership, and multiplying impact.

Steward (Leader)

Step into leadership. Help us steward the vision we have been given, and the mission we are on together, to transform an industry, and truly impact lives for good.

Take ownership of your growth, stay coachable, and lean into the tools provided.
Your success starts here!

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- 2) People Knowledge - We will offer specific in person and virtual training workshops to help you lead with value, build deep relationships, and serve clients strategically with integrity.

STEWARD:


- 1) Leadership Development - We will offer specific in person and virtual leadership training workshops to help you understand how to lead people situationally, learn how to have collaborative conversations to resolve conflict, and coach others to help them grow.
- 2) Leadership Events - We will provide you access to various leadership development events to help you learn from high-level leaders who have a proven reputation for leading and stewarding teams well.

START:

Arterra Toolbox

Included is a list of the software that you have access to; as well as a summary of what each is, and a link to each:

Google Suite:

All google apps are linked and can be accessed by clicking on the  in the upper right-hand corner once you are logged in.

- Arterra uses Google as our email host.
 - <https://mail.google.com>
- Google offers the ability to share calendars. You can keep your personal calendar here and access the “Arterra Events” calendar
 - <https://calendar.google.com/calendar/u/0/r/month/2025/6/1?pli=1>
- You can access a variety of shared documents in the “Drive”
 - <https://drive.google.com/drive/my-drive>
- There are a host of other apps that you can access and use including the new “Gemini” AI feature.
 - https://gemini.google.com/?utm_source=app_launcher&utm_medium=owned&utm_campaign=base_all

Arterra Insider

- This is our Intranet It is Arterra’s exclusive conversation hub. You can post questions for our agents, find out information that has already been posted, review information on our policies, have private conversations or find other helpful links.
 - <https://arterrainsider.konverse.com>
- It also comes as a mobile friendly app:
 - Apple: <https://apps.apple.com/ph/app/arterra-insider/id1562244441>
 - Android: <https://play.google.com/store/apps/details?id=com.konverse.arterrainsider>

Brokerage Website:

- This is a great way for clients to look for homes online or research our agents. The site links to the MLS and is updated real time.
 - www.arterrarealty.com

Personal Website:

- Can be found through the brokerage website. To get access to your personal website it is your first initial and last name followed by '.arterrarealty.com' example: John Smith would be found at
 - www.jsmith.arterrarealty.com
 - This is a great place to invite your clients to register with you so they can start creating and saving home searches.

Customer Relationship Management software (CRM) & Marketing Hub:

We use BackAtYou (BAY) as both our CRM (Client BAY) and the marketing platform (Social BAY).

- Client BAY is a powerful tool that can help you stay top of mind with your leads by keeping notes, creating reminder tasks and starting automated campaigns with them. It also has a client portal to be able to save searches and keep track of what they are looking at.
- Social Bay is integrated with all the MLS's we serve. It has templates that you can use for print, social media, or for electronic communications. It can even post directly for you onto your social media accounts if you want
 - <https://www.arterraadvisors.com>

Transaction Management & EMDs:

- DotLoop is where all the documents needed to complete any type of transaction are kept. This includes documents for both you and your client. DotLoop allows for electronic signatures and stores all these documents in an organized manner to look back at. Documents are to be submitted for review to the Compliance team before the closing is scheduled to happen. This ensures fast commission payments after all documents are completed and reviewed.
 - www.dotloop.com
- Within DotLoop, we use Earnnest to electronically collect EMD funds from our buyers. This is a great feature that offers a very safe and secure way for our clients to send funds. The Clients are invited by you to send funds. Earnnest connects with the clients' bank and will send funds to the Brokerage's EMD account via an ACH transfer. When completed Earnnest will send receipts to you, Arterra and the client.

Agent Recruiting:

- Arterra uses a software where you can grow your sponsor tree to earn some passive income through revenue sharing. There is a landing page that is branded to you for your interested agents to be able to fill out and to learn more about.
 - <https://getbrokerkit.com>

Agent Portal:

- The agent portal is a way to see all the transactions that you have closed on to evaluate where you are financially.
- This is a great way to be able to get the information that you need for your quarterly estimated tax payments. Arterra posts all the results for all your Revenue Sharing payments here. You can also pull excel reports from this software.
 - <https://revshare.arterrarealty.com>
- There is also a section that you can use to set your own personal yearly sales goals and to assist you in staying accountable.

Other Resources (not to be forgotten):

- **Your Broker** is available to look over any contract that you have questions on or **as a resource for any** questions that you have. They are a wealth of knowledge and would love to have a conversation with you. Although, be prepared for these conversations, your brokers are more than happy to help, but they won't "do" for you.
- **Your Local Board of Realtors** is a wealth of knowledge. They will host training classes periodically. Some of the training classes are eligible for your required continuing education (CE). These are a great place to rub elbows with others in the business, talk through situations, or to just learn from each other.
- **Your MLS** has a variety of tools that you will find helpful. **Including** (depending on your MLS subscription these offerings will differ):
 - CubiCasa is a software that provides 2D or 3D floor plans by taking videos of the home.
 - Cloud CMA or RPR to help create Comparative Market Analysis (CMA) for your Sellers
 - Showing Time will help you manage your showings or book appointments for your buyers.
 - SentriLock will assist with obtaining lockboxes.
 - Forewarn is a proactive safety and intelligence app that provides instant knowledge prior to face-to-face engagements to better understand and address risk.
- There are many more tools that your MLS has. Get curious and look around or take a class hosted by your MLS to learn more.

Roadmap of your Business

A Business Plan for Your Life and Your Legacy

OVERVIEW:

- A Business plan is a working document that, when broken down into smaller measurable goals, has the main purpose of reaching your monetary goals and business growth expectations.
- When a business plan is relevant to your life, you have a much greater chance in reaching the expectations pre-determined in your plan.
- A business plan consists of 3 things:
 1. A realistic budget of your life expenses, projected business expenses and additional money for extras
 2. A pre-determined "snapshot" of what your average sales price and your average commission will be
 3. A determination of how many clients you will need to serve to reach your goals
- A business plan also helps you create strategies that are measurable to launch your business and help you stay on track.
- A good business plan has an accountability component so that you can divide and conquer what needs to be done to assure you stay focused.
- If you fail to build a business base (SOI-Sphere of Influence) your business will only be transactional in nature, never rising to its full potential.
- The data needed to build a strong business base is
 1. Names
 2. Physical Addresses
 3. Email Addresses
 4. Phone Numbers
 5. Social Media Platform you are connected on
 6. Any other desired information (birthdays, home purchase anniversary, etc.)

ARTERRA *Business Planning*

Where should you begin? WHO AND WHAT YOU WANT TO BE KNOW FOR.

This section will take you through these steps one by one to get a clear picture of where you want to be, and more importantly, WHO and WHAT you want to be known for. Once you have that you can plan out the actions that will get you there. The steps are listed out below with workpapers that will follow.

➤ First spend some time thinking of your “The 5 Equities In Life”. This exercise is about you as a person. What is driving you and where do you want your career to lead you.

THE 5 Equities in Life:

Looking forward to the end of this year, what do you want your life to look like in the following categories? Jot down your thoughts, dig in and take some time at self-reflection. This is important, and is the foundation of where you are going.

Personal Relationships: _____

Mental/Skill-Building: _____

Physical: _____

Spiritual: _____

Financial: _____

Vision Boards for Real Estate Success

Clarify Your Vision. Energize Your Goals. Build the Life and the Legacy You Want.







What Is a Vision Board?

A vision board is a visual representation of your goals, dreams, and values. It uses images, words, and affirmations to help you focus on what matters most in both your personal and professional life.

Rather than just writing down goals, a vision board brings them to life. It helps you **see** your future — and believe in it.

Why Use One in Real Estate?

As a real estate professional, your mindset drives your momentum. A vision board can help you:

-  **Remember Your Purpose** – Your Purpose is what makes you uniquely you, it's your reason for being.
 -  **Remember Your Why** – Your Why is your motivation, it is your reason for doing.
 -  **Clarify Your Goals** – both short-term and long-term, and review them every day.
 -  **Stay Motivated** during challenging times to keep you focused.
 -  **Visualize Success** – a proven technique used by top achievers who have overcome tough challenges.
 -  **Stay Focused** on what truly matters; PEOPLE, and YOUR IMPACT on others!
 - Whether you're just starting or leveling up your business, a vision board is a powerful anchor.
-

How to Create a Vision Board

You can create your board physically with paper and glue or digitally using tools like **Canva**, **Pinterest**, or **Google Slides**.

Step-by-Step Instructions

1. Reflect on Your Goals

Think about your vision for your real estate business and life.

- What kind of success do you want?
- What lifestyle are you building?
- What do you want to give, experience, or feel?

2. Gather Visuals

Collect inspiring **images, quotes, words, and symbols**.

Use:

- Magazines
- Free image sites (Unsplash, Pexels)
- Canva or Pinterest
- Your own photos


3. Create Your Board

Lay out your images on a board or digital canvas.

Tip: Group by themes like *Career, Lifestyle, Mindset*, or let it flow naturally.

4. Display It

Place it where you'll see it every day:

-  Home office, closet door, planner, desktop wallpaper, or phone background.

5. Revisit and Update

Your goals will grow — your vision board should too.

Update it regularly to reflect new ambitions and milestones.

Sample Vision Board Themes



“My First Million in Real Estate”

- Luxury homes
- Commission checks
- Dream clients
- Celebrations



“Freedom Through Real Estate”

- Flexible schedule
- Passive income
- Travel and family time
- Peace of mind



“Service and Impact”

- Happy clients
 - Community work
 - Donations and giving back
 - “Helping families find home” quote
-

Final Thought

You are not just building a business — you are building a life.

Let your vision board serve as your daily reminder to stay aligned, focused, and inspired.

ARTERRA Business Planning cont.

Next if you haven't done this already (or even if you have) create or amend your Annual Budget.

Home	Monthly	Yearly
Mortgage/Rent		
Home/Rental Insurance		
Electricity		
Gas/Oil		
Water/Sewer/Trash		
Phone		
Cable/Satellite		
Internet		
Furnishing/Appliances		
Lawn/Garden		
Maintenance/Improvements		
Other		
TRANSPORTATION		
Car Payments		
Auto Insurance		
Fuel		
Repairs/Maintenance		
Registration/License		
Other		
DAILY LIVING		
Groceries		
Child Care		
Dining Out		
Clothing		
Cleaning		
Salon/Barber		
Pet Supplies		
Other		
BUSINESS		
Board Dues		
MLS Fees		
Advertising		
Office Supplies		
Business Taxes (DON'T FORGET THESE!)*		
Other		
HEALTH		
Health Insurance		
Gym Membership		
Doctors/Dentist Visits		
Medicine/Prescriptions		
Veterinarian		
Life Insurance		
Other		
TOTALS		

* Talk to your Accountant to discuss what to pay in for your estimated taxes as a 1099 employee

ARTERRA *Business Planning*

➤ Once you have an annual budget, now you can calculate the Financial Goals needed to get there.

Financial Goals

Calculate Average Commission Earned for One Year:

Average Sales Price (Ex \$285,000)	_____	A1
% Commission (3%)	_____	A2
Office Commission	_____	(A1 * A2) = A3
Your Commission Split (80%)	_____	A4
Your Average Commission	_____	(A3 * A4) = B2

Calculate The Number of Closed Transactions Needed to Reach Goal:

Gross Income Needed (from Budget)	_____	B1
Your Average Commission	_____	B2
Closed Transactions Needed	_____	(B1/B2)

****1 Listing Taken for Every 3 Presentations Given****

****1 Presentation for Every 3 Prospects****

****10 Contacts to get 1 Prospect****

****2 Qualified Buyers for Every 1 Closed Transaction**

****5 Prospects to get 1 Qualified Buyer**

****10 Contacts for every 1 Prospect**

i.e.: For every one closed transaction needed, you must make 100 contacts/year

Getting Contacts and Turning them into Prospects

PHASE ONE: *Lead Generation*

Now that you know how much you need to make to pay your bills. You were able to figure out how many transactions you need to get there and from there you can see how many contacts you need to have to get there. This is why you need a plan. You know a lot of people or your Sphere of Influence. START HERE. Make a list. Use an excel spreadsheet, a CRM (Customer Relationship Management) software or a google document.

What is a sphere of influence (SOI)?

SOI is simply a group of people you personally know. Whether it is a client you have not seen in 10 years, or a family member you wake up with every morning—the core idea behind the term ‘sphere of influence’ is that, by simply knowing you, you can impact them in some way.

Why is growing your SOI important?

Your sphere of influence is important to grow because these are typically people who already trust you. These are people you can lean on and ask for assistance in growing your business. The conversations that take place with someone in your sphere will be much easier and a lot less uncomfortable than speaking with a stranger. Simply put, SOI wants to help you, you just need to ask for the business. **Over 65% of your business comes from your SOI.**

Who belongs in your SOI?

- Past coworkers
- Your friends (Yes, even your high school pals you have not seen in 20 years)
- Your spouse or partner’s co-workers
- Your spouse or partner’s friends
- Your kids’ friends or their parents
- Your kids’ teachers and school workers
- Your extended family
- Your neighbors
- Friends and acquaintances from any social groups such as Neighborhood Association, Rotary, PTA, etc.
- Anyone you interact with regularly (even if that just means once every couple of months). For example: your hair stylist, accountant, doctor, dentist, even your bank teller.
- USE THE MEMORY JOGGER on page 9.

Do not get sidetracked thinking about what you are going to say when you reach out, or why you really do not know this person that well, etc. The first step is to just get the names down on paper - and at this point, it’s crucial you don’t undervalue or overthink a single candidate for your list.

Organize your list:

- There is no right or wrong way to organize your list. A good rule of thumb when you are first getting started with contacting your SOI is to list your contacts according to how you know them.
 - For example: Friend, Family, Acquaintance, etc. Once you get to know them, you can break it down into Buyer and Seller Prospects.
- Where you make your list will depend on where you are in your business. For brand new agents a simple excel spreadsheet will do the job. Once you get rolling with regular follow ups and a growing number of referrals, you are going to want a CRM system that lets you see immediately what the last follow up was so you can keep connecting in a consistent and relevant way. Arterra agents have access to a CRM system. Contact your admin team or your Broker if you are not sure of what this is or how to access it.

Now what? Make your SOI Contact Plan.

BUT first, just reach out like you normally would:

Contacting your SOI in a way that feels natural is not only more cost efficient (mailers are pricey!) - it's also more effective. Put yourself in your contact's shoes. If you have a friend, you usually chat with via WhatsApp, it would be odd to call them up "on business" and start asking about whether they know anyone who needs to buy a home. Instead, send them a quick message sharing a recent win, funny story, or revelation about the market. Try to do this for every person on your list. And remember, you are NOT selling.

Again, don't overthink this, just start to send out texts, make calls, connect with them on Social Media to reconnect and let them know that you are a Realtor and you can help them when they need it.

Memory Jogger for your SOI List

LIST YOUR WARM MARKET FIRST		
Address Book	Neighborhood List	Old co-workers
Business Cards	College Friends	Teachers
Christmas Card List	Co-workers	
LIST YOUR RELATIVES NEXT		
Parents	Grandparents	Father-in-law
Brothers	Sisters	Mother-in-law
Aunts	Uncles	Brother-in-laws
Nieces	Cousins	Sister-in-laws
Nephews	Grandkids	Other in-laws
WHO IS/ARE MY... ?		
Accountant	Fishing buddies	Favorite Waitresses
Association members	Florist	Favorite Waiters
Auto mechanic	Friends	computer Tech
Bowling Team members	Housekeeper	ISP Support Person
Bus driver	Hunting buddies	Pet Groomer
Car salesman	Insurance Agent(s)	Retired Coworkers
Card group	Jeweler	Retired Friends
Child Care Provider	Lawyer	Retired Relatives
Children's friends' parents	Leasing Agent	Bottled Water Supplier
Church members	Mailman	Coffee Supplier
Club members	Maintenance Person	Florist
Convenient Store Manager	Minister(s)	Sports Team members
Co-workers	MLM friends	Supermarket managers
Delivery Person	Neighbors	Tailor
Dentist Office employees	Optometrist	Hairdresser
Doctor's Office employees	Paperboy	Truck Drivers
Donut Shop Manager	Pharmacist	UPS Driver
Dry Cleaner	Police	Veterinarian
Fed Ex Driver	Property Manager	Barber
Fireman	Real Estate Agent	Day Care Owner
WHO SOLD ME MY ...?		
Appliances Boat	Fishing license	Office Equipment/Supplies
Boat	Fishing Bait	Telephone/Cell Phone
Business cards	Furniture	Tires And Auto Parts
Camper	Glasses/contacts	Sony® PlayStation
Car	HDTV	Stereo
Computer	House	Vacuum cleaner
Craft Supplies	Hunting license	Wedding Items
I KNOW SOMEONE WHO IS A ...		
Antique Dealer	Fisherman	Office Manager
Art Instructor	Garage Mechanic	Pilot / Stewardess

Getting Contacts and Turning Them into Prospects

What is an SOI Contact Plan? It is a plan that you will follow every other month that includes 6 items of value and six phone calls over the course of seven months. Follow up to ensure you are top-of-mind, creating better opportunities to gain business. Items of value include the Home Buyer and Seller Guidebook, Market Stats, CMA, Holiday cards, Just Sold or Just Listed Postcards. Get creative here.

The phone calls will help you stand out from the competition by touching on important points in a previous conversation when following up. Your goal is to stay top-of-mind for their real estate needs and goals.

Month 1

Send or drop off a handwritten note with your business card

Contact by phone to *follow up*

Month 3

Send or drop off an item of value

Contact by phone to *follow up*

Month 5

Send or drop off an item of value

Contact by phone to *follow up*

PHASE TWO: Lead Conversion (Outside of your SOI)

Step 1: Create And Control Your Schedule

If you are a part-time or full-time agent, you need to have dedicated timeblocked hours throughout the week that you will 100% dedicate to your business.

When it comes to what to do with your time, think of it like the diet of a bodybuilder. Just like a bodybuilder makes sure they eat a balanced diet between protein, carbs and fats, and agent should balance their time between prospecting, marketing and appointments. Bodybuilders eat 50% carbs, 30% protein, and 20% fats. Real estate agents time consists of 50% prospecting, 30% marketing, and 20% appointments.

Side nugget: The four most important activities for agents are:

- Showing Property
- Writing Offers
- Listing Appointments
- Negotiating Deals
- (if you notice, prospecting isn't on this list lol)

Here is the schedule suggested for a full-time agent, and the following page is blank for you to create your own. **Stay Motivated & Stay Consistent.**

DAILY ACTIVITY SCHEDULE

TIME	ACTIVITIES
6:00 AM	Gym
7:00 AM	Breakfast/reading
8:00 AM	Create To-Do list for the day/check MLS hotsheet Check Active, Pending, & ABS List/Make Follow Up Calls
9:00 AM	Start Dialing for New Business
10:00 AM	
11:00 AM	
12:00 AM	Lunch
1:00 PM	Content Creation for social media & weekly email
2:00 PM	Appointments, etc for the rest of the day

DAILY ACTIVITY SCHEDULE

TIME	ACTIVITIES
6:00 AM	
7:00 AM	
8:00 AM	
9:00 AM	
10:00 AM	
11:00 AM	
12:00 AM	
1:00 PM	
2:00 PM	
3:00 PM	
4:00 PM	
5:00 PM	
6:00 PM	

Stay Motivated & Stay Consistent.

Step 2: Find Your Lead Generation of Choice

What is Lead Generation and How is it Done?

After you have successfully spoken to everyone in your SOI and they have a clear understanding that you are a real estate advisor, it's time to start generating leads that are not in your sphere.

We are not in the real estate business - we are in the lead generating and people business. Without buyers and sellers, our industry would not exist.

A prospect is any person you come in contact with that wants to buy or sell a home within a specified time frame. Whether they need to sell in one week or one year they are a potential client that we need to gain the TRUST of, making us the obvious choice when they are ready to buy or sell a home.

Prospects can be found anywhere at any time as long as you are in communication with people. Which is why anyone can find them, but where great sales people are separated from average sales people is how often they attract and find these prospects and also how they follow up with them.

The Best Ways to Find Potential Prospects

Phone Calls: According to Fanatical Prospecting, the best way to prospect is to be physically making phone calls to your potential clients. This allows you to be on the hunt for a new client, rather than hoping they come to you. We can control who we call, how many calls we make, and how long we make those calls for. All the best agents will tell you this, time and time again.

Cold Calling: This is when you map out a specified neighborhood on an auto-dialer. Typically, we like to call these people and talk about a home in their neighborhood. We can also tell them about a home we just sold in their community and ask if they are thinking about making a move themselves.

FSBO: You can find 'For Sale By Owner' listings through sites like Zillow. The people behind these listings are raising their hands, letting you know they want to move. We need to talk to them and see how we can potentially help sell their home.

Expired Listing: These are people who HAD their home on the market but it did not sell, and now the home is considered expired on the market. It's our job to call them and tell them how Arterra is different from any other brokerage and we need to help them sell it the second time around.

Unconditional Withdrawn: These are people who previously had their home on the market, and at some point decided to fire their agent. They still want to sell, but their previous agent just wasn't a good fit. We need to call them and show them how Arterra is different and how we can help people sell successfully with a great experience along the way.

Open Houses: Hold events at other Arterra listings. Open houses allow potential buyers to walk through and preview the home during a specific day and time. You get to speak face to face with people about REAL ESTATE! The great thing about open houses is that you get to sharpen your skills and dialogue while potentially attaining buyers in the process.

When people come to see the home, you will now have a chance to earn their business and show your worth as a real estate advisor. Bring a “sign-in” sheet to the home with you that people must fill out when they come in the house. This allows you to record their info and follow up with them after the event. The only downside to open houses is that we cannot control how many people walk through!

Social Media: Social media is the new way of doing business. People are connected through many different platforms including, Facebook, Instagram, Linked-in, X, Snapchat, and many more. The most impactful element of Social media is the ability to get content out to hundreds of people instantly, allowing you to build rapport and relationships quickly. We like this to be one tool in our belt to help grow your brand and image. However, it’s not enough to create a great amount of clients for your database. But if you can create great social media content, engage with people the right way and build your brand - it will help your business grow.

Door Knocking: People consider this an old fashioned way of sales, however, it still works with great success. Print out marketing materials on a local Arterra listing and knock on the doors of neighboring homes to talk about the property. Much like open houses, it gives you an opportunity to talk about real estate and be face-to-face with people. Similar to phone calls, we can control how many doors we knock! Many people will tell you this is a waste of time and it doesn’t work. Just recently, an Arterra advisor listed THREE houses on ONE street from door knocking. It works. People just don’t like the effort door knocking requires.

Constant Communication: No matter where you are, what you’re doing, or who you’re with, always remember that you’re a real estate advisor. In social settings such as parties, dinners out, grocery shopping, or coffee stops, you need to always keep an ear out to see who’s talking about buying or selling a home. You will be surprised how often the people around you talk about real estate. Don’t ever force a real estate conversation, just be mindful that people around us everyday may be a potential client!

What questions do you ask when talking to these leads?

What is their motivation for wanting to make a move?

This is the most important factor. These reasons will be your main talking points on the calls moving forward. Motivation is what gets people to act.

Example: They just had another baby and need another bedroom. Or maybe the kids moved out of the house and now they need to downsize.

What is their time frame to make this move?

Example: If their youngest kid is graduating high school and going to college next fall and that's when they want to downsize, you know they will be basing all their decisions on this timeline. Still set them up on a home search with the criteria they are looking at in their next home. Still stay in contact with them to build rapport and trust over the phone. Send value items or handwritten letters once a month to let them know you appreciate their time talking with you and you look forward to being their real estate advisor when the time comes. Have your business card in the letter.

When building rapport and a relationship, use the acronym **F.O.R.D** to ask the right questions and listen to them when they are talking. People love talking about themselves. So get them talking!

Family: Ask them who they live with, who will be making the move with them, who might be moving in with them when they make this move?

Occupation: What do they do for work? Keep the conversation going after you ask this. Relate to them and allow them to tell you all about their job(s).

Recreation: What do they like to do for fun? In their free time do they like to go golfing in the summer? Do they enjoy reading? Riding bikes? Anything they like to do for fun allows you to connect with them on a deeper level. (also, this allows you to get them an awesome closing gift when the time comes)

Example: If they tell you they love watching football, now you have a conversation starter on your next phone call. "Did you catch the Lions game last weekend? I can't believe that happened!" When you can truly relate to them and talk about things they like, you gain incredible rapport and relationships with your clients.

Dreams: Who doesn't love talking about what they want to accomplish in 5-10 years? Maybe they tell you they have been working really hard to get a promotion at their company or one day they hope to be retired in Florida with their significant other. This gives you great insight to not only understand them on a deeper level, but also to potentially how you could help them accomplish these dreams as a real estate advisor.

The first thing you need to realize is what the #1 objective of lead generation actually is: *To create a conversation with the desired prospect.*

You can do this in so many ways. You must find what works best for you as quickly as possible.

If you already have your lead generation of choice, you can disregard the rest of Phase II and go straight to Phase III. If you have not found the Lead Generation method that works best for you to create enough conversations with the right prospects, allow me to offer a few ideas to help you. If the goal of any lead generation is to create enough conversations with the right prospect, first you need to answer the following questions:

Who are the *right* prospects?

How many conversations are *enough*?

The answers are up to you.

Who are the right prospects? People who own the exact type of properties that you would like to sell. Why? Because property owners are the highest-quality buyers, and have the ability to choose you to list any of their properties with any agent at any time.

So, these are what are called **double-sided prospects** who may *buy* or *sell*. There isn't a higher-quality prospect. Social media, YouTube, and Zillow leads are random, and mostly buyers. Although these lead generation avenues have the ability to be used to build million dollar businesses for agents, it wouldn't be the preferred method (although social media has its place and must be utilized). Why? Because under these avenues, **you have no control** over how many leads you get, who the leads are and at what price. On top of that, you would be totally dependent on a third party for the success of your business. Control your own destiny through picking the exact clients you desire, grabbing their contact information for a penny, and using that data to create as many relationships as you feel you need to build the size business you want. Hopefully that makes sense.

Some of the ways to target the exact property owners who own the types of properties you would love to sell is with programs like: Redx, Geoleads Plus, myPlusLeads, Power Dialer Plus, and the AdBuilder.

Once you have a list from one of these programs, you now have unlimited seller leads of your choice in the market...you will never call them all.

Here's what to do next: Find a buyer for a specific criteria property. If you do not have a buyer for anything, don't worry. Call your Sphere of Influence to check on them and find out if they might be interested in buying anything in the near future (a new home or rental property). See "*Sphere Of Influence Script*" in the Scripts & Strategies section.

Another great way to find a buyer would be to use the "Trade-Up Seller" strategy (also found in the Script & Strategies section). Buyers are everywhere, and remember, it does not have to be a buyer ready to write a contract this very second. You just need a buyer that *might* buy something.

Once you have a buyer for a specific type of home, use Redx or Geoleads to find the property owners that fit that criteria, and start writing the “*Golden Handwritten Letter*” This strategy is a one-size-fits-all for agents, and is why it’s a go-to for any agent building their business. You can literally use this to jump into any market and start getting listings immediately (residential, luxury, commercial...any market). It also eliminates your fear and anxiety of calling owners because you are sending a letter and “following up” with a phone call (so, it’s not really a cold call). Here’s an example of that letter:

YOUR LOGO

YOUR BUSINESS NAME HERE
5555 Your Address, Street Here
Your City Here, ST 66666
T: 123456789000000
Fax: 0000987654321

Dear Mr. and Mrs. Johnson,
Would you consider selling
your home at (address) to a
prospect of mine?
Sincerely,
Your Signature

youremail@here.com
www.add - yourwebsitehere.com

Write as many of these as you can to the desired homeowners of your buyer’s criteria. Handwrite the entire envelope as well including the return address. The more handwritten it is, the higher your open rate will be. Use regular sized business envelopes.

From here, we have two ways of creating conversations with these targeted homeowners: they call us from the letter, or we call them to find out if they received it. Either way it goes, you can use either the “**Follow Up Letter Script**” or the “**Letter Funnel Process**” found in the Scripts & Strategies section. What you will do is give it a week and see how many calls you get.

Use the *Letter Funnel Process* on those inbound calls as a filtration process. Then, after the week, go ahead and start calling the owners whom you sent the letter using the *FollowUp Letter Script* (found in the Scripts & Strategies section). This strategy creates immediate conversations with the exact prospects you want for the lowest price possible. Agents can go from 0 to 20 listings in a few months with this strategy. Get the Golden Handwritten Letter train moving, and keep it going with new batches of letters going out every week. Start reserving each prospecting day for different lead types (see Step 1). Here are examples of a typical week:

Monday: FSBOs - Follow-up w/ old ones/set appointments with new ones

Tuesday: Expireds

Wednesday: Follow Up From Letters

Thursday: Trade-Up Sellers

Friday: Follow Up With Everyone

Use Friday's to comb through your entire business and follow up with everyone and anyone. This will help make sure everyone was taken care of before the weekend hits. You can start with just one or two lead generation avenues if you are just getting started. Like, start with the letter strategy and FSBOs.

You don't have to do everything on day one. Ease into it at your own pace, but make sure you are having conversations with property owners daily.

Side nugget: With FSBOs, look at those like buyer leads. Call to find out how it's going and why they want to sell, but ultimately ask where they are moving and if they need an agent to help them with the buy side. This will help you develop the relationship for the listing once they are ready to give it to an agent (80% of FSBOs end up listing).

PHASE THREE - Lead Retention & Conversion

Step 3: Learn how to deeply connect with your prospects

Family Effect (FE) - Giving your prospects and clients the same treatment you would your own family. Eventually, there is a point in top real estate agent's careers where they treat all clients like family. Advise them the same way you would if it were your own mother buying or selling a property. Ask them the same questions you would if it were your father thinking about doing a deal. This will fair you very well. It will help to create much deeper, life-long relationships with your clients...and will result in a lot of business.

So, how do you start to use FE? It all starts with the most important question you can ask a prospect... "WHY?"

You want to get to the bottom of the reason they really want to buy or sell. They didn't wake up one day and decide to buy or sell a property for no reason. There is something going on in their life much bigger than the deal that's causing them to want or need to do this deal.

So, everything should stem from, "Why?" The moment any prospect tells me they might do a deal ANY TIME in the future (today, next week, next month or next year), the next question is; "Why?"

This starts the process of both being the most professional agent and showing your prospect how much you care through your curiosity of their situation. Most agents will not ask these deeper questions and end up misrepresenting the client due to not fully understanding what they want to do and why they want to do it...big mistake.

Once you ask the big question, "Why?" are you looking to buy or sell (there are several different ways to ask this), the next step is to LISTEN. Listen to their answer so intently that it sparks three more questions out of your genuinely curious mind (Goal: to go 5-10 questions deep).

Side nugget: Block out your inner voice saying things like, "I hope they like me...what am I going to say next...I hope they do a deal...don't mess this up." When you have inner conversations going on, you can't truly listen to what your prospect is saying, and will not be able to articulate a real purposeful conversation.

Step 4: Learn How to Convert Through Helping

Now that we have shown our prospect how much of a caring professional we are by going 5-10 questions deep on their situation around buying or selling, we now have all the information we need to convert.

It's time to take all the information gathered and put together a custom game plan for the prospect around their needs and motivations to help them accomplish their goals as smoothly as possible.

Notice, the words were not “to accomplish *our* goals”. This business is all about the prospects and *their* goals...focus on them. After developing the game plan customized around their needs, it's time to communicate the plan and what the next steps would be.

The next step could be anything: showing them a house, listing appointments, meeting for coffee or lunch, emailing them information, a follow up call at a later time, or even nothing.

We don't know what the next step is until we understand their situation and have put together the next steps. It shouldn't be an agents' focus to just try to set appointments or get the prospect's email address. There should be no singular, predetermined focus in terms of next step.

The focus should be getting the prospect to open up to you about what they plan to do and why they plan to do it. It may take time to develop the communication skills needed to do this at the level necessary to accomplish that.

Once the gameplan is laid out and you feel the next step is for the client to move forward, here are the closes you may want to use: For a seller, once you go through the customized plan you created with them, if the next step was to list the property, you would then say, “*If it were me, I would go ahead and put it on the market. Are you ready to go ahead and do that?*” Their answer to that would tell you exactly where they stood on moving forward, or not. And, that's what you need to know...where they stand.

If they aren't ready, go back into discovery to find out why. For buyers, once you found the best house for them and you can tell that they really liked it, you could say, “*If it were me, and I liked this house, I would go ahead and make an offer before someone else does. Are you ready to go ahead and do that?*” Again, same for the buyers...you just need to know where they stand & why.

You are not trying to close them. You are trying to fully understand their situation so that you can help them. Remember, you are creating life-long relationships with your prospects. Each relationship created is worth 10-20 future deals throughout your career. *Stacked relationships will yield a massive career.*

Conditions VS. Objections

This is a fundamental concept for you to understand if you have a true **quality** lead in front of you. To have a database at the highest level, you need to have a clear understanding of this.

Conditions are something a prospect will tell you that is holding them back from making a move that is out of our control, regardless of what we can provide to them. There is nothing you can do as an advisor to overcome this condition, as much as we want to help. There is nothing we can do to speed up their timeline.

Examples:

- They lost their job and currently can't qualify for a mortgage loan
- They are waiting until their kids graduate from high school
- They are currently leasing and they have to wait until their lease is over

Objections are reasons (that are not always true) a potential prospect will use to explain why they don't need your services. They are very common for real estate agents to hear over the phone. There are about 20 common objections you will hear, and of course there are always outliers that throw a curve ball at you. However, you need to understand when you hear them so you can overcome the objection and get them back to focusing on their real estate goals.

Examples:

- They heard houses only sell in the summertime.
- They want to remodel their house because it won't sell unless they do.
- They heard the housing market will level off next year.
- They don't believe they need a real estate advisor to sell their home.
- They have another agent they think they will be using (but have they ever sat down with a real estate advisor?)

These are all common excuses potential prospects will use in an attempt to get you off the phone. It is our job to handle these objections and provide them with the proper response to earn their business and trust. Think of it this way - an objection is just a smoke screen to get you off the phone. They still need your services; you just need to overcome the objection. But when dealing with a condition, you have to simply tell the potential prospect you can appreciate their situation and will continue to follow up with them in the future.

Practice responses to some of the objections listed as examples above. Role play with a friend. Have your friend come up with some others. These take practice to be able to get comfortable with your responses.

However, you still need to ask all the appropriate questions to learn as much as you can about the prospects. Once you have all the right information, you will be able to follow up with them properly.

Step 5: Document what you learned

Here is a sample form of the information that you need to gather when making these connections.

Name: _____ Cell #: _____ Email: _____
 Address: _____ City: _____ Zip: _____
 Source (SOI, Cold Call, facebook, ect.): _____
 Lead type (Circle one): Buyer Seller Buy & Sell Lease
 Timeframe (Circle one): ASAP 1-3 months 3-6 months 6+months
 Reason to move (Motivation): _____
 Notes about the conversation (F.O.R.D): _____

Step 6: Stay top of mind with your leads

What to do with a Lead

6-12 Months Out

Write a handwritten card with your business card after your first contact with your potential client. Call a week after you send your card asking if they received it.

2 TOUCHES A MONTH (Call / Email / Folder Drop Off / Note / CMA / ‘Just Sold’ by them)

1 touch every 3 months MUST be a phone call

Examples of value add items / touches:

- Sending a holiday card / email (this should be about 5-8 EASY touches a year)
- A house sold close to them so they can keep up with the market.
- A postcard in the mail of a home you just listed or a recent sale of yours.
- Drop off a folder with your business card, a CMA, and a note that is a call to action that’s personalized for them.
- A text with a house that was just listed by their house that we should keep your eye on.
- An item that can be mailed or dropped off to them. Such as a Calendar, Client Appreciation Event, or Sports Team Schedule

2-6 Months Out

You **should** be able to set an appointment with this seller to help get all the details to them so they can game plan around their net proceeds and also to get in tune with the market. OR for a buyer they may need to talk to a mortgage lender to guide them to make a change in their finances so they can buy with the most cost efficient options to them (pay off debt, increase credit score, save more money for closing costs, etc.)

Write a handwritten card with your business card after your first contact with your potential client. Call a week after you send your card asking if they received it.

3 TOUCHES A MONTH (Call / Email / Folder Drop Off / Note / CMA / 'Just Sold' by them)

1 touch every 2 months **MUST** be a phone call

READY NOW, or within the Month

You **need** to meet with this person ASAP. Getting an appointment with this lead should be extremely easy! We need to meet this client in person at their house to give them a listing presentation or meet this buyer at our office to have a buyers consultation. NOTE: The sooner you can meet a potential client in person, the greater odds you will have to earn their business.

Write a handwritten card with your business card after your first contact with your potential client and also **send a text thanking them** for taking the time to speak to you.

1 Call or Text a Week | Things to talk about

- A day and time to meet to give a buyer's consult or listing presentation
- Getting in touch with a mortgage lender
- Getting the house ready for the photographer - when is a good day & time?
- Get out and look at houses that fit their criteria
 - **They need to be on every automated search / campaign possible.**
 - Set up on a just sold search for sellers and just listed houses for a buyer

All direct forms of communication need to be open. Email, call, and text.

Other Ways to Add Value (can act as one of your Touches if it is sent directly):

When nurturing leads, especially in real estate, the key is **providing value consistently without always selling**. These are a few ideas to get you started, in a monthly newsletter that you create or ideas for social media posts. Pick one and get started.

Education & Expertise

1. **Neighborhood Guides** – Create detailed overviews of local areas, including schools, restaurants, and parks.
2. **Market Updates** – Share digestible monthly or quarterly local real estate trends.
3. **Home Buying/Selling Tips** – Provide step-by-step guides or checklists.
4. **Financing Education** – Break down mortgage types, pre-approval tips, or credit score guidance.
5. **Investment Opportunities** – Offer basic knowledge on getting into real estate as an investment.

Personal Touches

6. **Handwritten Notes** – Send a quick thank-you or just-because card.
7. **Birthday or Anniversary Messages** – Celebrate small milestones.
8. **Holiday Greetings** – Send thoughtful messages on holidays without pushing a sale.

Professional Resources

9. **Preferred Vendor Lists** – Share trusted local contractors, stagers, landscapers, or lenders.
10. **Exclusive Content** – Tips on some of the Product Knowledge morsels that you have learned about.
11. **Event Invites** – Invite them to client appreciation events, open houses, or webinars.

Engaging Content

12. **Short-form Videos** – Educate or entertain with reels or stories on common questions.
13. **Client Stories** – Share testimonials or success stories to build trust.
14. **Behind-the-Scenes** – Show what you're doing to prep a listing or negotiate a deal.
15. **Local Spotlights** – Feature businesses or community events in the area.

Relationship Building

16. **Ask for Feedback** – Make them feel heard by requesting their opinion on a topic (e.g., “What’s your biggest home buying fear?”).
17. **Quarterly Check-ins** – Personalized messages just to see how they’re doing.
18. **Help with Non-Real Estate Needs** – Be a connector (e.g., recommend a good daycare or fitness coach).

Tools & Calculators

19. **Home Valuation Tools** – Offer help on what remodeling items have the best ROI.
20. **Affordability Calculator** – Help them estimate what they can buy.
21. **Equity Check** – Especially useful for past clients or those who’ve owned a while.

Automation & Systems

22. **Smart Drip Campaigns** – Customized emails based on their interest level or timeline.
23. **Monthly Newsletters** – Combine market insights, tips, and a personal update.
24. **“Coming Soon” Alerts** – Give them a head start on new listings.

The Secret to Becoming a Great Advisor

If you want to know the 'secret sauce' to being a high producing real estate advisor, then go back to the first page of this pdf and read the whole thing over again, then get to work. That's it... Hard work.

START:

Scripts & Strategies

The following pages include all the scripts and strategies for you to take and use immediately. Remember to use these scripts as the path you want your conversations to take. You do not have to use these word for word. They are meant to get the conversation started and spark your curiosity about the prospect's situation. Have natural, organic conversations with your prospects just as you would with your own family.

Here's an exercise:

Next time you speak with a family member or close friend, take a mental snapshot of how comfortable you are with them and how relaxed you feel speaking with them. Emulate that same feeling when talking to your prospects.

Remember:

- Words are only 5% of effective communications....much more critical is your tonality and body language and your ability to understand the personality of your potential client (mirroring) .
- Scripting is designed to auto-install a winning vocabulary and the most effective delivery of what to say and the importance in learning how to say it.
- You MUST practice, drill and rehearse until you know the dialogues in your sleep.
- Knowing the correct dialogue is important to build confidence and get you in front of people within the first 90 days.

Follow-Up Letter Script:

Hello Mr. Johnson?

Yes?

Hey Mr. Johnson. It's _____ from Arterra Realty in _____. How are you doing today?

I'm Great.

Oh, me too. Just enjoying the day. Isn't it nice out today?

It sure is.....

Great! Well look, I don't want to take up too much of your time, but I sent you a handwritten letter about your home on _____. Did you happen to see that?

From here, we want to play right off of their response. If they got the letter, find out if they want to sell and take them through the process on the next page. If they do not want to sell, connect and establish a lifelong relationship for future business and get them on your weekly email/texts just as we do in our other scripts.

Reminder: when asking for email, ask if it's ok to stay in touch and wait for a "yes". Then, ask "What's a good email?"

Letter Funnel Process:

Use this process when a seller calls you off the letter.

- The seller calls and asks, "Do you REALLY have a buyer? "Your response will be, "Yes, I do. Are you REALLY interested in selling, or are you just wondering if I have a buyer?" If they really do want to sell, immediately dive into WHY they want to sell.
- If they pass that step in the funnel, the next step is explaining the next step which is for you to see the property in person and establish an asking price and commission before telling your buyer about the property.
- At the appointment, really connect with them through finding relatable interests and set the expectations that your buyer may or may not move forward and that we may have to list the property. I do this when they ask what my commission rate is. When they ask, I reply, "Well, normally I charge 6%, but since this could be a quick deal, I will come down to 5% to help you out, and I will even do you one better than that. If my buyer doesn't move forward and we agree to put the home on the market, I will still honor the 5%."
- If all things line up, it's time to present the deal to your buyer and give the seller the feedback either way.
- Work to get the deal done with your buyer, or list the property if your buyer does not move forward.
- Solidify the life-long relationship no matter what. Put everyone involved into your weekly email database.

Expired Listing Script:

{Ring, ring, ring} Hello?

-Hey! Mr./Mrs. _____?

-Hey, Mr./Mrs. _____? This is (your name) with Arterra Realty {pause}

How are you today?

-That's good. Me too. Just enjoying this good weather outside. Isn't it gorgeous today?

{Pause and let them talk. Listen to what they say. Chances are high that you get into a conversation about the weather, back and forth. This will set the comfort level of the call. If it's raining, talk about how nasty it is today. Adjust your opening to what the current weather is doing.}

{When this part of the conversation is over, transition into the reason for your call}

-Well look, I don't want to take up too much of your time today, but I see that your house was on the market (a few days ago/weeks ago/years ago). **What ever happened with that?**

BOOM! They are going to open up and tell you the whole story and everything you need to know to help them {pause and listen}

You shouldn't need the rest of this. Take the conversation where you need to, or if you need a direction...use this below

-Ok, I understand. Well, why do you think it didn't sell? {pause and listen. This is a very important question. This will give you an idea of what their motivations are and what they are looking for in an agent.}

-I see. Well, I certainly understand that. Is there a good time for you to show me the house?
{make the appointment}

{If they say, "Why do you want to come see it?" Or, "Why, do you have a buyer?" you tell them as follows}

-I may have a buyer Mr./Mrs. _____ but I need to come see the house before I go any further. When would be a good time?

{End the call politely and professionally. Let them know you look forward to meeting with them on the day and time you agreed to}

{When you meet them, have them show you the house and then say, "This place is beautiful. Why are you selling?" This will get them talking about what their motivations are and give you an understanding of their goals. From there, do everything you can to help them accomplish their goals.}

FSBO Script

{Ring, ring, ring} Hello?

-Hey! Mr./Mrs. _____?

-Hey, Mr./Mrs. _____, this is (your name) with Arterra Realty. {pause}

How are you today?

-That's good. Me too. Just enjoying this good weather outside. Isn't it gorgeous today? {Pause and let them talk. Listen to what they say. Chances are high that you get into a conversation about the weather, back and forth. This will set the comfort level of the call. If it's raining, talk about how nasty it is today. And, it doesn't have to be about the weather. Just something non-real estate related like "How was your Christmas?" or "Getting ready for Thanksgiving?"}

{When this part of the conversation is over, transition into the reason for your call}

-Well look, I don't want to take up too much of your time today, but your house is for sale by the owner. Is it still for sale? {pause and listen}

If they say YES...

-Great! Can you tell me about the house? {really get them talking right here. The more they talk, the more comfortable they are. You want to know the price, size, upgrades, everything they did to it, etc. Sellers always like talking about their property and why it's the nicest in the subdivision.}

-Wow! That sounds like an amazing place. Why in the world would you want to sell it? {This is the most important part of the call. It gives you the bigger things going on in their life that are causing them to sell. Knowing this gives you the upper hand against any agent because now you are helping them with their BIG WHY. We will use this to create a game plan with them later.

Find out what they want to BUY.}

-I gotcha. Ok, that makes sense. Let me ask you this...if you were to work with an agent, do you have one in mind that you would use?

If the answer is NO...

-Ok, well what I would like to do is try to help you sell this on your own for no charge from me? {How you will help them is by making sure they are everywhere online, have great remarks/pictures and priced right. Make sure you know where they are moving to. One of three things will happen...1) They list with you at some point as you continue following up 2) They sell it on their own and use you to buy the next property, or 3) Nothing happens which is part of the business.}

From there just continue helping them with their situation. Make sure you have their cell phone number and email address to add to your database. And, remember...Treat them like family.

Sphere of Influence Script

{Ring, ring, ring} Hello?

-Hey! Mr./Mrs. _____?

-Hey, Mr./Mrs. _____, this is (your name). {pause. They know you already. This is a friend of a family member. You don't have to announce the company name yet.} How are you today?

-That's good. Me too. Just enjoying this good weather outside. Isn't it gorgeous today? {Pause and let them talk. Listen to what they say. Chances are high that you get into a conversation about the weather, back and forth. This will set the comfort level of the call. If it's raining, talk about how nasty it is today. And, it doesn't have to be about the weather. Just something non-real estate related like "How was your Christmas?" or "Getting ready for Thanksgiving?"}

{When this part of the conversation is over, transition into the reason for your call}

-Well look, I don't want to take up too much of your time today, but I got my real estate license and have been doing very well with it. I wanted to see if there was anything in the world I could do for you? {pause and listen} **{Our goal here is to let them know we are in real estate, find out if we can help them at this time, find out if they already have an agent they would work with and collect their cell number/email address.}**

-Is there an agent you would work with?

-What's a good email/cell number for you?

-Great, if there is anything I can ever do for you, I would appreciate the opportunity. {Of course, these are people you know so you will already have a connection with them and may chit chat about any old thing you may have in common and so forth. Just let the conversation naturally progress and plant seeds for future deals and referrals}

-Who do you know that may be looking to buy or sell? {This is a good question. It doesn't give them an option to say yes or no. When you ask "who do you know" this makes their brain start trying to think of names of people that may be looking to buy or sell.}

{Enjoy the time you have with your sphere and catch up on old times. Keep your relationships at a high level and make sure you know what their real estate goals are and have a plan in place to help them.}

Voicemail Script

{Ring, ring, ring} Nobody answers

I like to leave a simple message, and you can do this one of two ways

-Hey! Mr./Mrs. _____. This is (your name) with Arterra Realty. Give me a call when you get a chance at (your number).

OR

-Hey! Mr./Mrs. _____. This is (your name) with Arterra Realty. Give me a call about (their subdivision) when you get a chance at (your number).

I want you to think of voicemails as another form of branding. You want them to hear your name, company, number and most importantly...confidence.

Referrals

Script 1

Hello, this is _____ with Arterra Realty. _____ (referrer's name) gave me your number and asked me to call. (He/she) said you are thinking about (buying a home, thinking of making a move).

_____ (referrer's name), who is a (past client, friend of mine, or we go way back) said you need my help, and I am calling to see how I may best help you.

Script 2

Hello, this is _____ with Arterra Realty. _____ (referrer's name) gave me your number and asked me to give you a call regarding your real estate needs.

I am a real estate advisor and _____ (referrer's name) said you were looking for a great advisor to help you achieve your goal of (buying a home, selling a home, moving, etc.)

How may I best help at this time?

Real Estate Advisor FAQs:

What's the difference between an Arterra real estate advisor and a traditional real estate agent?

While both help clients buy and sell homes, a *real estate advisor* takes a more comprehensive and strategic approach to your real estate needs. As your advisor, I'm not just here to facilitate a transaction—I'm here to guide you through the bigger picture.

Whether you're considering **renovating, relocating, rebuilding, or even holding off on a move**, I have the tools, resources, and experience to help you evaluate all your options. This means offering insights on market conditions, home value impact of renovations, long-term investment potential, and helping you connect with trusted professionals—from contractors to financial planners.

Think of a real estate advisor as your long-term partner in building wealth and security through real estate—not just someone who helps you buy or sell a property.

What makes you different from other agents I've talked to?

The great thing about working with me is that you not only receive my expertise, but the support of my senior partners as well. Arterra's founding team's 50-plus years of experience in the industry gives us direct access to in-depth training with an emphasis on product knowledge. I understand the building process and value that selections and finishes add in the home, and can use this to help you find the best fit for you and your family.

As your trusted real estate advisor, it is my role to understand the ins and outs of the industry so that I can support you in a transaction that meets your individual needs.

Closing:

Something I discussed with my colleagues recently was the difference between a home built prior to 2009 or after 2010 that can save a homeowner thousands.

– Are you familiar with what that is?

I would love the opportunity to talk with you more in the near future. Are you available this week for another quick conversation?

"Why should I hire a real estate agent?"

"That's a great question—and honestly, one that more people should ask. Buying or selling a home is one of the biggest financial decisions most people ever make, and it comes with a lot of complexity and emotion. A real estate agent is there to be your expert, your advocate, and your guide through every step of that process."

"We bring a deep understanding of local market trends, pricing strategy, negotiation, and legal documentation. But beyond that, we also handle the details—marketing, showings, inspections, offers—so you're not overwhelmed or leaving money on the table."

"Even in today's digital world, real estate is still a people business. A good agent, or better yet, a good advisor doesn't just list your home or open doors—we build relationships, solve problems, and help you make confident, informed decisions."

"So, whether you're trying to get the best price for your home or find the right place to start your next chapter, having someone in your corner who does this every day really makes a difference."

"What is your commission for being my Realtor?"

"Great question. The standard commission in our market is typically around 6%, which is usually split between the agent representing the seller and the agent representing the buyer—so each side receives about 3%. That said, commission can be negotiable depending on the situation."

"What's most important is what you're getting for that investment. I don't just put a sign in the yard and hope for the best. I bring a full marketing strategy, professional photography, negotiation expertise, and a network of buyers and agents to help your home sell quickly and for top dollar. My goal is to more than earn back that commission by maximizing your net proceeds."

For Buyers:

"For buyers, it's good to know that in most cases, my commission is paid by the seller through the listing agreement, so working with me typically doesn't cost you anything out of pocket. But even though you're not the one paying directly, you're still getting full representation, market insights, negotiation power, and guidance every step of the way."

"I'm here to protect your best interests and help you make a smart, confident decision—without the stress of going it alone."

"I'm not paying a 3% commission—will you do it for half?"

"I completely understand wanting to save money—this is a big transaction. But let me share why that 3% matters and what you're actually getting for it."

"My job isn't just to list your home—it's to *sell* it, for the highest possible price and with the fewest headaches. That means professional marketing, expert pricing strategy, staging advice, negotiation experience, and navigating every legal and financial detail until we close. Cutting the commission usually means cutting the level of service, exposure, or effort—none of which help you get the best result. Ultimately, I'm here to help you *net* more, not just save a fee. Most of my clients walk away with more in their pocket because I help avoid costly mistakes and maximize their home's value. Would it be okay if I showed you what that looks like with your home specifically?"

What if the objection of the price of the commission is coming from family or a friend.

"I totally get where you're coming from—and I really appreciate you trusting me enough to even have this conversation. Because we're family/friends, I want to be transparent with you."

"That 3% isn't just a fee—it covers everything I put into getting your home sold the right way: professional marketing, pricing strategy, negotiations, showings, legal paperwork, and guiding the deal all the way to a smooth closing. I'm not here just to list your home—I'm here to protect your interests and help you walk away with as much as possible."

"That said, I always want to be fair, especially with people I care about. If you're open to it, let's sit down, and I can walk you through exactly what I do and what that looks like in dollars and cents for your situation. If there's a way I can help and still keep it a win-win for both of us, I'm happy to talk through it."

OR

"I love that you came to me—seriously, it means a lot that you trust me with something this big. And I want to be really honest with you, because we're family/friends."

"I always give my full effort and service to every client, but when it's someone I care about, I go above and beyond. That said, my commission reflects the time, effort, marketing costs, and expertise I invest to get the best result for you—not just a sale, but the *right* sale."

"If I discounted that, I'd be doing less than my best for you, and that wouldn't sit right with me. I want to treat your home—and your goals—with the same level of care I give to any high-end client, because you deserve that."

"But here's the good news: I *can* help you save money where it actually counts—by negotiating a great price, avoiding costly mistakes, and helping you walk away with more in your pocket at the end. That's where I bring real value, and I'd love the chance to prove that to you."

What if they compare you to a discount broker? Or “But another agent said they’d do it for 1% or a flat fee...”

"I hear you—and honestly, there are always going to be agents or companies who offer lower fees. But what I’d ask is: are they offering the same level of service, strategy, and personal investment? Because what you save in commission, you might lose in sale price, time on market, or negotiation strength."

"Real estate isn’t a one-size-fits-all service—it’s not about just putting a home online and waiting. It’s about understanding the market, showcasing the home to the right buyers, and negotiating in your best interest. And if anything, I care *more* because it’s *you*. That’s exactly why I won’t cut corners on what I deliver."

SERVE:

Working with BUYERS

Buyer Consultation

As a buyer's advisor, your top priority is to always act in the client's best interest. Your fiduciary duty includes loyalty, confidentiality, full disclosure of material facts, reasonable care, and proper accounting. Keep this commitment at the forefront throughout the transaction.

Facts to Consider:

- **100%** of homebuyers now use the Internet at some stage of their home search—making online research truly universal ([nar.realtorthezebra.com+5spendmenot.com+5taylorscherseo.com+5](#))
- **52%** of buyers actually found the home they purchased through an online listing
- **43%** of buyers reported that their very first step was to look online for properties ([nar.realtor+1spendmenot.com+1](#))
- Despite extensive online use, **88%** still purchased through a real estate agent or broker
- Truly motivated buyers buy because:
 - **Home price reductions or affordability:**
 - 62% prioritized affordability when buying in 2025—up significantly from 48% in 2024 ([forbes.com+2listwithclever.com+2ipx1031.com+2](#))
 - **Mortgage rates and market behavior:**
 - 82% of sellers are closely watching mortgage rates and believe rate trends influence decision-making .
 - Buyers are concerned about rising rates: among sellers, 78% expect rates to remain high or increase in the next year ([realestatenews.com](#))
 - **Other motivations:**
 - 64% of buyers planned to purchase homes under \$400K (vs. a \$416.9K median) due to affordability ([listwithclever.com](#))
 - 30% felt financially overwhelmed during or after buying
 - **Rising rent / build equity** due to fears of escalating costs ([bhg.com+4businessinsider.com+4nar.realtor+4](#))
- Buyer characteristics in a Challenging Market (This is what I found in our market for 2025 – Look up what the current climate is to see if any of this has changed)
 - **High expectations for detailed local info:** Buyers continue to value accurate, granular information on schools, neighborhoods, and community amenities—it remains a top priority among home searchers. This aligns with ongoing trends showing that customizing search filters around community data is increasingly common. (*Implied by buyer behavior trends.*)
 - **Many are waiting for the market bottom:** A substantial portion of prospective buyers are delaying purchases for price drops or rate declines. Recent Redfin and

MarketWatch analysis notes buyers sitting on the sidelines waiting for better entry points and mortgage rate relief

([linkedin.com+9awealthofcommonsense.com+9youtube.com+9listwithclever.com+1bluewestproperties.com+1youtube.com](#))

- **Overwhelmed by options and lacking urgency:** Two-thirds of buyers express concern about rising prices and low inventory, yet remain cautious due to uncertainty.
- **Locked-in sellers reduce buyer motivation:** Many current homeowners aren't listing due to ultra-low existing mortgage rates (often below 4%), leading to low inventory and contributing to a less urgent buyer market.
- **Need to sell before they buy:** A significant share of serious buyers are also sellers; the "lock-in effect" means many won't list until rates drop, delaying their ability to purchase ([raleighrealty.com+14listwithclever.com+14reddit.com+14](#))

So, how do we create urgency and motivation for the undecided buyers?

The truth is, trying to time the market perfectly is nearly impossible—by the time most people realize it's rebounding, the best opportunities are already gone. Currently, there are excellent opportunities to purchase properties that align with what many clients consider their "ideal next home." Here are a few ways to help them take action:

- Have a compelling website that captures buyer leads and generates inquiries
- Provide local MLS market info and trends to build trust, create rapport, get appointments
- Provide detailed community and school reports to highlight the benefits of an area
- Up-to-the-moment property alerts – Using the CRM or your MLS.
- Communicate timely marketing messages and incentives that address the reasons motivated buyers act
- Develop niche marketing messages for first-timers, second home buyers, empty nesters, investors, etc.

Understanding when things will happen and how the process works will go a long way to establishing trust with your client. Walk through this timeline on the following page with your clients to explain the process and estimated timing.

Then use the Buyer Consultation workpaper to help guide you to ask all the right questions. This is the information that is needed to help build their search for properties and ensure that you are looking for exactly what they find important. Use this as a guide.

Buyer Consultation Questionnaire

Name _____ Date _____

Address _____

Email _____ Phone. _____

Reason For Move (ask about FORD:

Family (who): _____

Occupation: _____

Recreation: _____

Dreams: _____

Moving time frame _____ Primary Residence (Yes/No) _____

Condo or Single Family Home _____ Must Sell Home First (Yes/No) _____

In a Lease(Yes/No) _____ Lease Expires _____

Pre-approved Lender (Company) _____

Needs a Lender Referral (Yes/No) _____

Desired City/Twp and locations _____

School Districts _____

Price Range. _____ Home Style _____

Bedrooms min ____ Bathrooms min ____

Square Footage Range _____

Best Days/Times to View Properties _____

Please indicate which of the following are "must have", "desired" or "not important" features:

WISH LIST:	Must Have	Desired	Not Important
Basement			
Finished Basement			
Garage			
Fenced Yard			
First-Floor Master			
Public Water/Sewer			
Paved Street			
Updates (kitchen/bath)			
Hardwood Floors			
Deck/Patio			
Garage size	1 car	2 car	3 car
Size of yard	0.25 – 0.50 Acre	0.5 - 1.0 Acre	1.0+ Acre

Buyer's Timeline

Timeline of Events	Client Action/Communication
Meeting 1: Buyer consultation and sign up on website	<input type="radio"/> Pre-Approval/Good Faith Estimate <input type="radio"/> Set search criteria & set auto emails <input type="radio"/> Sign Exclusive Buyer Representation Form
Meeting 2-5: Scheduling/view homes (1-3 weeks)	<input type="radio"/> Search/stay active on my website <input type="radio"/> Scheduling flexibility (24 hours policy)
Day 1: Write offer and offer acceptance	<input type="radio"/> Get EMD to me or our office ASAP. EMD must be deposited by the office no later than 48 hours from the date of seller acceptance. **The EMD gets deposited right away!! <input type="radio"/> If there is an HOA be sure to include time to receive and review the ByLaws and Master Deed <input type="radio"/> Schedule inspection w/ inspector of choice—call to schedule ASAP and within terms of the contract (typically 5-7 days)
Day 2-7: Inspection/Due Diligence Period	<input type="radio"/> Call lender and inform them that an offer has accepted. Ask lender what documents they will need you to gather (tell them to hold off on appraisal until inspection is complete). <input type="radio"/> Research any necessary details on property (home, property, zoning, area, etc.)
Day 7: Inspection acceptance or re-negotiation & Agreement to Terms	<input type="radio"/> I will be communicating moving forward on all details and developments
Day 8-14: Appraisal ordered, performed & results back	<input type="radio"/> No action needed, results typically take 14 days
Day 14-28: Final Underwriting	<input type="radio"/> Shop around for insurance quotes (using the same carrier for auto typically saves you money!) <input type="radio"/> Additional documents may be needed & requested by lender **Response time and communication is KEY
Day 28: Clear to Close	<input type="radio"/> I will arrange closing date and time w/ all parties
Day 30-32: Final Walkthrough	<input type="radio"/> This happens within 48 hours of closing
Day 32-35 Closing	<input type="radio"/> All parties on Purchase Agreement are present <input type="radio"/> Bring driver's license <input type="radio"/> Bring certified check (or wire funds) payable to title company

***Timeline is estimated and is subject to change

Buyer Advisors Checklist

ARERRA BUYER TRANSACTION CHECKLIST

Agent: _____ | Buyer(s): _____

Property Address: _____

Closing Date: _____ | Offer Date: _____

PRE-OFFER PREP

- ☐ Buyer Consultation Completed
- ☐ Exclusive Buyer Representation Form Agreement Signed
- ☐ Set Up Auto-Email Alerts
- ☐ Shared Lock Lending Loan Officer Contact
- ☐ Buyer Pre-Approval Received

HOME SEARCH & DUE DILIGENCE

- ☐ Located Desired Property
- ☐ Completed CMA (Comparative Market Analysis)
- ☐ Previewed Similar Properties in Area

OFFER PREP & SUBMISSION

- ☐ Contacted Listing Agent to Confirm Compensation and how it should be shown
- ☐ Drafted Purchase Agreement
- ☐ Attached Required Docs to Offer Email:
 - ☐ Purchase Agreement
 - ☐ PDF of Listing Ticket
 - ☐ Pre-Approval Letter
 - ☐ Seller Disclosure & Lead-Based Paint Disclosure (if needed)
- ☐ Sent Offer Email to Listing Agent
- ☐ Called/Texted Listing Agent to Confirm Receipt
- ☐ Any Addendums and Disclosure Regarding Agency Relationships

ONCE OFFER IS ACCEPTED

- ☐ Earnest Money Submitted (within 48 hrs)
- ☐ Review Bylaws and Master Deed if there is an HOA
- ☐ Bottom line the Purchase Agreement with your Clients
- ☐ Sent Full Offer Package to Lender, Title Company, Arterra Front Desk

☒ INSPECTION & FOLLOW-UP

- ☐ Buyer Scheduled Home Inspection (within timeframe)
- ☐ Advise Client to consider scheduling Sewer, Septic & Well, radon, or other inspections
- ☐ Attended Inspection
- ☐ Wrote Addendum (if applicable)
- ☐ Sent Addendum to Lender, Title Company, Arterra Front Desk

☒ APPRAISAL & CLOSING PREP

- ☐ Checked Appraisal Results with Lender
- ☐ Confirmed Appraisal Met or Exceeded Value & Communicate with the Listing Agent
- *** NEVER SHARE the appraisal or the amount IF IT'S MORE THAN PURCHASE PRICE!!**
- ☐ Coordinated with Title Company for Buyer Docs
- ☐ Sent Buyers Final Closing Docs (you can share just the settlement statement)

☒ CLOSING COORDINATION

- ☐ Scheduled Closing Time w/ All Parties
- ☐ Scheduled Final Walk-Through (day of closing if no occupancy)
- ☐ Offer to bring Lockbox to closing for Listing Agent

☒ POST-CLOSING

- ☐ Utilities Transferred (by Buyer)
- ☐ Returned Closing Package & Commission Check to Arterra
- ☐ Facilitated Key Exchange (if occupancy)

Buyers, Writing the Offer and Negotiating

Buyers must understand that there are 3 choices when it comes to negotiating offers, addendums, or appraisals:

- Accept It As Is
- Do not accept the terms
- Need to Negotiate

Be sure to do a CMA on the property to advise your clients on possible offers. However, ultimately it is up to them. If clients are interested in a property, call the agent to find out the details. However it is important, to **make sure to know if you are in a buyer or seller's market, as some of these questions are dependent on market conditions.** Here are some things to make sure to ask:

- What is the seller looking for in an ideal offer? (price, terms, closing date, etc.)
- Are there any competing offers currently—or expected?
- Is the seller flexible on contingencies?
- What is the preferred closing timeline?
- When are you presenting offers to the sellers?
- How will you be handling multiple offers?
- Would an occupancy period be helpful to the seller?
- **What is the buyer's agent compensation?**
- Are there any offers that fell through, and why?
- What's most important to the seller in this process? (*Price, speed, certainty, flexibility... etc.*)
- How would you like the offer packaged or submitted?
(*Email format, subject line, attachments—small details that make life easier for the agent.*)

Writing the Offers

Connect your clients and the loan officer to see what the timeline looks like for the loan that they may qualify for. It's important to let the loan officer know of the home that they will be putting an offer on. There may be insight from the loan officer that may make your offer more competitive.

Make sure that you are using Arterra's Purchase Agreement (PA). This has been vetted by attorneys to ensure that our buyers are protected so it is important to use it. Refer to DotLoop for the PA as it can be completed online and sent for electronic signature.

Couple of points to note if this is the first PA that you are writing, ensure ALL of the blanks are filled in AND use dates if asked for not "TBD" or other language. Our brokers can review these to ensure that you have it filled out properly before you send it out for signatures. However, please be respectful with their time – ask about this with them as much in advance as you can so that the time is available for review.

What can we do to stand out if there are . . . Multiple Offers?

- Have a Valid and Credible Pre Approval: This seems obvious, but most sellers will not take an offer without proof of funds.
- Shorten the Inspection Period - This shows the seller you are more serious. An inspection period allows a buyer to backout during that time, so the less days we have for an inspection, the lesser chance we have to withdraw in the seller's eyes.
- Offer an Appraisal Guarantee - This promises the seller(s) more money in the event an appraisal comes in below the agreed upon purchase price, typically that results in a re-negotiation period. If you offer a guarantee, you're telling the seller you will pay 'X' above that appraised value.
 - Example: You offer \$300,000.00 and agree to pay \$10,000 above a low appraised value. The house appraises for \$280,000.00. The seller will now make \$290,000.00 because you agreed to bring \$10,000.00 in cash above a low appraisal. If this wasn't offered, then it would be a re-negotiation period which the seller won't find as desirable.
- Offer Occupancy After the Closing - This gives the seller time to move out of the house after the closing with less stress. The seller would be your 'tenant' after the closing, so you can agree to a dollar amount the seller pays you per day after the closing.
 - Letting them stay for free after closing is a GREAT way to stand out and is highly recommended if there are multiple offers on the home.
 - Example: You allow the seller to stay for 30 days for free after the closing.

- Increase your EMD Amount - This shows the seller you are willing to put more of your money in the deal up front because you want the house.
 - EMD is held in escrow and deposited within 48 hours after an offer is accepted, so the seller would view it as you are more serious about the purchase.

NOTE: There are other ways as well, every situation is different, so communicate accordingly. However, these are some of the strongest ways to stand out! Stay on top of this by continuously learning. Keep talking to others (especially your Broker) to see what you can do to stand out.

You have written a great offer with your clients. Now, you will need to include in the packet you get your buyer clients to sign:

- MLS Listing
- *Agency Disclosure*
- PA and Any Addendums (FHA/VA, pool, well & septic, contingency)
- Seller's Disclosure
- Lead Based Paint Disclosure
- *Affiliated Business Association Disclosure (ABAD) – if necessary*

What is sent to the Listing agent:

- MLS Listing
- PA and Any Addendums (financing, pool, contingency)
- Seller's Disclosure (will probably be in the Listing Ticket)
- Lead Based Paint Disclosure (will probably be in the Listing Ticket)
- Pre-approval letter

DO NOT SHARE the Exclusive (or Limited) Buyer Representation Agreement

In the email to the listing agent provide the basics of the offer and ask for confirmation of receipt. **Be sure to call or text the agent to follow up.

If you don't hear back from the listing agent after their confirmation of receipt of your offer, check in with them. Make sure that you are ready for this communication. Keep your phone handy for calls or texts and your e-mail up to date.

Negotiating

Once an offer is submitted, it's up to the seller to respond with a counteroffer—adjusting terms like price, occupancy, closing date, or contingencies. This opens the door for negotiation, where both sides work to find an agreement that meets their needs. Your role is to guide the buyers through this back-and-forth strategically, keeping their goals in focus while maintaining open communication with the listing agent.

Negotiating isn't just about price; it can also involve repairs, appraisal gaps, timelines, or included items. You will review the seller's response together with the buyer, evaluate the options, and decide whether to accept, counter, or walk away. The goal is to craft a strong, thoughtful reply that puts you in the best position to win the home without overpaying or risking unnecessary conditions.

FINALLY, Offer is Accepted

Steps that the buyer should be ready to do after the PA is accepted.

- At this point your clients will know what an EMD is, when it's deposited, what it's for. You should also know if your clients will be providing a check for the EMD or will they be using Earnnest (through DotLoop) to electronically provide their funds. If using Earnnest, you will need to initiate the request to them through DotLoop and send it to them. Refer to the online training on how to do this.
- Have your clients schedule the necessary inspections, review HOA bylaws and HOA's Master Deed if there is an HOA. Discuss and remind them what was agreed to concerning the length of time that we have to get this done. Then review with them the recommendations made by the inspector to discuss with the listing agent any issues or questions that may come up.
- Have your buyer call the municipality to find out if there are any assessments on the property and what they are.
- Your clients then need to work with their loan officer to get all of the documents needed to get approved for the loan that they need.
- Your loan officer will coordinate the appraisal and will keep you posted on the results.
- Be sure to share any addendums that may come up after inspection with Title and the lender.
- The loan and all PA docs will be reviewed by Title and by Underwriting. You can and should help your client during this time and communication to ensure that this is a smooth process and all documents are received.
- Once all this is completed and both Title has cleared any issues and the Lender has provided a "Clear to Close", you will coordinate with the title company a date, time and

location of the closing. Make sure you follow this communication completely through so that all parties are aware and can make the closing.

- Perform a final Walk-through before the closing to ensure that the home is in the same condition as you saw it before the offer. This needs to be done within 48 hours of closing.
- Coordinate the Key Exchange if occupancy was granted by the PA.

Remember, your client can be a lifelong client and friend if you treat this interaction as valuable. It isn't just about the commission check. You are making a difference in people's lives.

Provide your client a closing gift of some kind. The more personal that you can make this will make a lasting impression. Give it at the closing table or consider giving them a small something at the closing table and stop by in a week or 2 and present them with something more meaningful and memorable.

SERVE:

Working with SELLERS

The Listing Presentation

A good listing presentation should include 4 parts:

1. Information about the company
2. Information about you
3. A Comprehensive Marketing Plan
4. A CMA (Comparable Market Analysis)
5. Optional items to include:
 - a. a net sheet – This Seller Net Out Sheet is important to update and provide to your sellers. A digital copy can be found at:
<https://sterlingtitle-mi.titlecapture.com/login>
 - b. active listings in the area
 - c. testimonials

Information About the Company

This section is your opportunity to build trust and credibility by showcasing the strength, reputation, and resources of your brokerage. Sellers want to know that they're partnering with a professional organization that brings more than just a name—one that offers real advantages in the marketplace. Include the following:

- **Overview of the Company:** Brief history, mission, and market presence. (e.g., “*Arterra Realty is a full-service real estate firm with a deep commitment to putting people first. With a track record of excellence across Michigan’s most sought-after communities, we bring experience, innovation, and integrity to every transaction.*”)
- **Local Expertise:** Highlight the brokerage’s footprint and knowledge in the local market or community.
- **Marketing & Technology Support:** Emphasize the tools, tech platforms, and marketing systems that back every listing (CRM, listing syndication, digital campaigns, personalized website for their listing, etc.).
- **Team Strength:** If your office includes a collaborative team environment, transaction coordinators, or in-house support (photography, admin, etc.), highlight how that benefits the seller.
- **Proven Results:** Mention sales volume, market share, or client satisfaction ratings to position the company as a leader in its field.

Your company is the foundation that supports your work—this is where you demonstrate that sellers are in good hands.

Information About You

This section should be focused on building a personal connection and demonstrating why *you* are the right advisor for the job. Sellers want to know you're not just experienced, but that you care about their outcome and will advocate for them throughout the process. Include:

- **Your Background & Experience:** Share your story—what brought you into real estate, your training, and what makes you uniquely qualified (backed by your company's resources).
- **Your Values & Approach:** Align your personal values with your client-first philosophy. For example, "I believe real estate is about people, not just property. My goal is to make this process feel informed, empowered, and supported every step of the way."
- **Track Record (or Your Team's):** If you're newer, highlight training, mentorship, and the broader team's performance. If experienced, share recent success stories, testimonials, or stats.
- **Communication Style:** Reassure the seller that they'll always be informed—mention how often and through what methods you update them.
- **What Sets You Apart:** Whether it's your attention to detail, negotiating skills, responsiveness, or passion for the work—make it memorable and authentic.
- **Connections to prepare you to list your home** - yard clean up companies, painters, cleaning companies, etc.

This section is about trust and relatability—help the seller feel confident that you're not only competent, but also someone they'll enjoy working with.

A Comprehensive Marketing Plan

A strong marketing plan is essential to getting a home sold for top dollar in the shortest amount of time. This section of the presentation should outline how you will create exposure, generate buyer interest, and ultimately drive offers.

Your marketing plan should go beyond simply putting the home on the MLS. It should showcase a thoughtful, multi-channel strategy that includes:

- **Professional Photography & Videography:** High-quality images and video tours that highlight the home's best features and make it stand out online.
- **Staging Guidance:** Advice or services to present the home in its best light, both virtually and in person.
- **Online Exposure:** Syndication to major real estate websites (Zillow, Realtor.com, etc.), social media marketing, and targeted digital advertising to reach potential buyers where they spend their time.
- **Print Marketing:** High-end brochures, postcards, and flyers distributed locally and at open houses.
- **Open Houses & Private Showings:** Strategically scheduled to maximize visibility and

convenience.

- Agent-to-Agent Marketing: Promoting the listing to a network of active, qualified agents who may have interested buyers.
- Consistent Communication: Regular updates to the seller with feedback, traffic stats, and next steps to ensure alignment and transparency.

The goal of your marketing plan is to position the property as compelling, desirable, and competitively priced—ultimately making it easy for buyers to say “yes.”

Comparative Market Analysis (CMA)

The purpose of a CMA is to guide the seller in developing an effective pricing strategy by analyzing recently sold, pending, and active properties. It provides a clear picture of how buyers might perceive the value of the home based on comparable features, location, and condition.

While a CMA doesn't determine an exact value, it offers a well-informed pricing range that reflects current market conditions. This allows the agent to advise the seller on what a buyer may realistically be willing to pay—and what the home may appraise for in today's market.

Remember, pricing is both an art and a science. The most effective approach is to partner with the seller throughout the process, keeping their goals and timeline top of mind—whether they're moving toward something exciting or away from a current situation.

Always frame value in terms of the market—not personal opinion. Use data, trends, and comparisons to build confidence and clarity around pricing decisions.

A few guiding truths when it comes to pricing:

- Fair market value attracts buyers—overpricing repels them.
- The first two weeks on the market are critical.
- The market never lies—but it can change its mind.

Time on Market: Why the First Two Weeks Matter Most

As an advisor, it's critical to communicate to your sellers that the first two weeks on the market are the most impactful. This is when a listing is freshest, generates the most excitement, and receives the highest level of attention from both buyers and other Realtors.

During this window, the home benefits from maximum visibility—thanks to the yard sign, MLS exposure, online distribution, email campaigns, open houses, broker tours, and more. Serious buyers are actively watching for new listings, and they will prioritize seeing homes that are newly listed.

If the property does not generate strong showing activity or interest within this period, it is often a sign that the home is overpriced or not positioned competitively against similar properties. Since location is fixed, the seller will need to consider either improving the home's condition or adjusting the price to re-align with market expectations.

As the listing agent, you should:

- Set clear expectations about timing and market behavior from the start.
- Regularly request feedback from showing agents.
- Provide constructive recommendations on staging, curb appeal, and any needed updates.
- Reassess pricing quickly if momentum stalls.
- Remind sellers that intelligent pricing is not about aiming high and waiting—it's about strategically positioning the home to sell within a competitive timeframe at fair market value. Homes that linger on the market risk developing a stigma, making future buyers question the value or assume something is wrong.
- Always aim to price right from day one and support that decision with a strong marketing push during the initial launch phase.

Getting the Price Right

In a neighborhood of similar homes, why is one worth more than another? That's the question that's teased buyers and sellers for ages, but the answer is simple.

Every home is different.

When a home is sold, a willing seller and a willing buyer have just announced to the world the value of that home. From there, other similar homes are benchmarked, but other factors come into play. The most important are:

- Location - The closer a home is to jobs, parks, transportation, schools, and community services, the more desirable it is.
- Size - Square footage impacts home values because they're built using more materials. Larger lot sizes mean more privacy.
- Number of bedrooms and baths - Over time, median homes have grown larger. Decades ago, household members shared bedrooms and baths without complaint, but today, families want more privacy. The median home purchased today is a three-bedroom, two-bath home.

- Features and finishes - Features such as outdoor kitchens and spa baths make a home more luxurious. A home finished with hardwood floors and granite countertops is going to cost more than a home with carpet and laminate countertops.
- Condition - The closer a home is to new construction, the more it will retain its value. It's perceived as more modern and up to date. Homes that are not updated or in poor repair sell for less. It's a good idea for homeowners to keep their homes updated and in top repair.
- Curb appeal - From the street, the home looks clean, fresh, and inviting. Fresh landscaping and flowers won't change the size or location, but they certainly add charm.

When two homes are identical in the same neighborhood, a higher price may come down to something as simple as views, or paint colors, or the overall taste of the homeowner.

Valuing a home will never be an exact science, but if you buy wisely, keep your home updated and in good repair, you should recoup most if not all of your investment.

Fair market value is what a willing buyer and a willing seller agree by contract is a fair price for the home. Values can be impacted by a wide range of reasons but the two largest are location and condition. Generally, fair market value can be determined by comparables - other similar homes that have sold or are currently for sale in the same area.

Sellers often view their homes as special which tempts them to put a higher price on the home, believing they can always come down later, but that's a serious mistake.

Overpricing prevents the very buyers who are eligible to buy the home from ever seeing it. Most buyers shop by price range, and look for the best value in that range.

Get started by using your MLS and some of the tools that are available to you. Here is an overview of a few of them.

Cloud CMA: Overview & Quick Guide

Cloud CMA is a powerful tool that allows agents to create custom, professional reports to support listing presentations, buyer tours, and open houses. This platform helps you deliver market data in a polished and easy-to-understand format that adds credibility and value to your services.

Getting Started

- Set up your account and log in.
- You'll land on the **Home Page**, which displays recent activity.
- **Important:** Ensure your MLS is correctly selected in the settings to pull accurate data.

Key Features

CMA Tab

- View, edit, or present previously created CMA reports.
- Easily share reports via email or link.
- Start a new CMA report with customizable templates and data.

Buyer Tour Tab

- Create detailed buyer tour packets with mapped routes and property information.
- Ideal for showing multiple homes to clients in one outing.

Property Report Tab

- Useful for open houses or as a leave-behind during showings.
- Includes multiple pages with listing photos, local points of interest, financing info, and more.

Flyer Tab

- Design one-page property flyers using listing data.
 - Great for open houses, flyer boxes, or sharing online to generate calls and leads.
-

RPR: REALTORS® Property Resource Overview

RPR is a comprehensive platform exclusively for REALTORS®, offering extensive data and insights about properties, neighborhoods, schools, and market trends. It's available via desktop and mobile app and is an excellent tool for both buyer and seller presentations, usually found within your MLS.

Profile Setup

- Click the **“Welcome”** message at the top right of the homepage.
- Select the **gear/settings icon** to edit your profile and ensure your information is up to date.

Home Page Highlights

- Watch training videos and tutorials to learn how agents are using RPR in real-world scenarios.
- Access quick links to search tools, reports, and property data.

Search Tools

All Properties & For Sale

- Search any address manually to pull up in-depth property details.
- Use filters to refine your results by status, type, or other criteria.

Neighborhood Tab

- Dive into local stats like median sales price, price trends, and average days on market.
- Ideal for including in CMA reports or understanding a specific area.

Schools Tab

- Filter by elementary, middle, or high school.
- View GreatSchools ratings, test scores, and nearby listings.
- Perfect for working with families who prioritize school districts.

Market Activity Tab

- Generate local market reports based on city, ZIP code, county, or neighborhood.
- Great for tracking trends or preparing updates for your clients.

RPR Mobile App

- All the functionality of the desktop version, on the go.
- Excellent for quick property lookups, generating reports from your phone, or responding to clients in real time.

Listing Documents & Seller Prep Checklist

When listing a home, it's essential to have all required documentation signed and submitted **before the listing goes live**. This ensures a smooth launch and protects both you and your clients legally and ethically.

Seller Documents ("Homework")

Make sure your sellers complete and sign the required documents in DotLoop. These are updated and will reflect all of the required forms that you need to complete the Listing.

- **MAKE SURE TO** get the Listing agreement signed.

Listing Setup Essentials

In addition to paperwork, gather or prepare the following:

- **Lockbox** (secure the key with a ring or attach it directly to the box)
- **Arterra Realty Yard Sign**
- **Your Custom Rider** (name, phone number, "Coming Soon," etc.)
- **Flyer Holder** (placed inside for showings or open houses)
- **Home Binder** (include marketing materials, disclosures, HOA info, etc.)
- **Booties & Entry Sign** (to protect floors and set the tone for showings)

Listing Launch Tasks

Ensure that you have all of the needed information to be able to create the listing in the MLS. Use the Residential input form from your MLS that asks for all of the specific information needed for data entry.

Once the listing goes live in the MLS:

- **Verify online visibility** within 24 hours on third-party platforms like:
 - Zillow
 - Trulia
 - Realtor.com***Be sure to have your profiles up to date!
- **Promote the listing on social media**, and tag or send the post to your sellers so they can share it too. #@arterrarealty
- **Send the MLS and the personalized website link** to your seller so they can view their listing live. Refer to the training video resources to learn more about the seller's personalized website.

Ongoing Seller Communication

Maintain regular communication with your sellers throughout the process:

- **Provide updates** on showings, feedback, and marketing results.
- **Discuss any necessary adjustments** to pricing, condition, or strategy.
- **Follow up after closing** to ensure they feel supported through the entire transaction.

Listing Agent Checklist

Pre-Listing & Listing Launch

- ☐ Complete and upload all listing paperwork; provide copies to the admin team.
 - ☐ Install yard sign and rider.
 - ☐ Schedule and order **professional photography**; upload photos when received.
 - ☐ Install **lockbox** on the property.
 - ☐ Order **preliminary title work** with the title company.
 - ☐ Create a **feature sheet** highlighting the home's key attributes.
 - ☐ Schedule **open houses**, ideally with a lender present for added value.
 - ☐ Launch marketing:
 - o Syndicate online through MLS.
 - o Share on social media.
 - o Door knock nearby homes.
 - o Mail **just listed** postcards.
 - o Place flyers inside the home and around the community as appropriate.
 - ☐ Send sellers copies of all signed documents and MLS listing.
 - ☐ Collect and relay feedback from showings and open houses **on a weekly basis**.
-

Offer & Contract Management

- ☐ Present all offers to the seller and walk through their options.
 - ☐ Negotiate offer terms, including price, possession, and concessions.
 - ☐ Contact the buyer's lender to confirm **pre-approval** and financing strength.
 - ☐ Once an offer is accepted, obtain **bottom-lined purchase agreement (PA)** and related docs from the buyer's agent.
 - ☐ Send PA and supporting docs to:
 - o Title company (both buyer and seller side)
 - o Lender
 - o Front desk/admin
-

Post-Acceptance & Transaction Management

- ☐ Help schedule the **home inspection** and communicate expectations to the seller:
 - o What access may be needed (e.g., attic, electrical panel).
 - o Items to leave on (water, utilities, pilot lights).
- ☐ Review the **title commitment** and identify any issues early.
- ☐ Negotiate repairs or concessions if an **inspection addendum** is submitted.
- ☐ Meet the **appraiser** at the property, if possible:
 - o Provide comps and list of recent updates to support value.
- ☐ Contact title companies to obtain **preliminary closing packages** and review details.
- ☐ Schedule the **final walk-through** with buyer's agent.
- ☐ Schedule the **closing** and confirm time/date/location with all parties.
- ☐ Review the **seller's closing disclosure/statement** and send to the seller for review.
- ☐ Advise seller to:
 - o Transfer utilities based on occupancy date.
 - o Obtain **final water read** from the municipality or utility company.

Closing & File Completion

- ☐ **Attend the closing** in person or virtually, depending on seller preference.
- ☐ Facilitate **key exchange** and send signed paperwork to title company for funding release.
- ☐ Deliver the **closing package to Arterra**
- ☐ Confirm broker commission disbursement (BCS) is correct and filed in DotLoop.

Additional Notes

- ☐ **Add ShowingTime or scheduling instructions** to MLS when listing goes live.
- ☐ **Confirm HOA docs and fees**, if applicable, and ensure buyers receive them within required timelines.
- ☐ **Set reminders** for key dates (e.g., inspection deadline, appraisal due, mortgage commitment).
- ☐ **Upload all documentation into your transaction management platform** (Dotloop).

Seller Timeline Samples

The following are two examples of a Seller's Timeline that you can use when reviewing the selling process with your clients. These timelines help set expectations, reduce stress, and provide clarity for your sellers from the beginning of the listing journey through to closing. Each timeline offers a slightly different layout and tone—choose the one that best fits your communication style, or feel free to customize them to better suit your personality, market, or the unique needs of each client.

Remember, the goal is to provide guidance and build trust by keeping your sellers informed every step of the way.

Timelines for Selling Homes

Initial Consultation

Goal: Understand your goals + timeline

- Walkthrough of the property
- Discuss timeline to Move/Sell
- Identify any repairs or prep work that should be done before selling
- Discuss market value and comps, pricing strategy, current market conditions, and review the seller's roadmap
- Review the listing process, paperwork, and next steps.
- Leave behind your Sellers Roadmap

Home Preparation

Goal: Make your home shine

- Decluttering, deep cleaning, and light staging have been completed
- Sign the Exclusive Right of Listing, getting necessary signatures
- Discuss pricing strategy
- Share a Seller Net Out sheet for an estimate of Proceeds
- Professional photography and video scheduled
- Minor repairs or curb appeal improvements are done
- Agent prepares marketing materials + MLS input

Launch + Listing Live

Goal: Maximize attention in the first 7 days

- Home goes live (or Coming Soon) on MLS + major real estate websites
- Install For Sale sign in the lawn.
- “Just Listed” marketing launched (email, social, signage) Or Coming Soon
- Showings begin — agents and buyers tour the home
- Weekend open house (optional)

Offers + Negotiation

Goal: Review offers + secure the best outcome

- The agent presents all offers and breaks down the terms. Share a Seller’s Net Out Sheet for an estimate of proceeds
- Negotiate price, closing date, repairs, and contingencies
- Once accepted, you move the home into “under contract” status on the MLS

Under Contract + Due Diligence

Goal: Navigate inspections and appraisal

- Buyer conducts inspections and appraisal
- Repairs or credits negotiated (if needed)
- Listing Agent coordinates with the title company, lender, and other parties
- Seller begins preparing for move-out/key exchange

Closing Week

Goal: Sign, hand over keys, and celebrate

- Final walk-through by buyer
- Closing day: seller signs documents (in person or remotely)
- Funds are transferred
- Keys handed off per contract

The Seller Experience

- ✓ Listing your home at the right price
- ✓ Time frame you desire
- ✓ Least amount of time on the market

Timeline of Events

Seller Action/Communication

Meeting 1: Seller consultation

- Meet at the Seller's home
- Determine what needs to be done to prepare to sell
- Discuss the timeline to sell/move

Follow up from me via email :

- An idea of asking price. Recap of Meeting

Meeting 2:

- We meet to sign and go over the contracts
1-2 days to schedule that meeting
- Go over seller costs

My Timeline

- I have my photographer out, 2-3 days to schedule
- Lockbox on the door, sign in the yard
- Pictures back in 24 hours
- LIVE on the Multiple Listing Service

***Timeline is estimated and is subject to change

This Seller Net Out Sheet is important to update and provide to your sellers. A digital copy can be found at: <https://sterlingtitle-mi.titlecapture.com/login>

Seller Net Out Sheet

Selling Price	
Current Mortgage Payoff	
Equity Loan/ 2nd Mortgage (Repairs)	
Listing Commission	
Selling Commission	
Compliance Fee	
Owner's Title Policy	
Revenue Stamp (MI - \$1.10 per \$1,000)	
Document Stamp (FL - \$3.50 per \$1,000)	
State Transfer Tax (MI - \$7.50 per \$1,000) (FL - \$7.00 per \$1,000)	
Title Company Closing Fee	
Home Warranty (est. \$500)	
Seller Concessions	
Association Status Letter (Up to \$600)	
Escrow (Water / Tax / Repair) Refundable	
Total Approximate Seller Expenses	
Estimated Cash to Seller	

SERVE:

Open Houses

The Power of Open Houses

- **91%** of homebuyers consider open houses an important part of the home search process.
- Nearly **half (48%)** of buyers aged 45–64 attend open houses during their search.

Open houses are not only an opportunity to sell the home—they're a powerful way for agents to meet new clients and expand their network.

Preparation is Key

Try to not host an open house alone. For safety and engagement:

- Partner with a team member, colleague, or a trusted mortgage lender.
- Choose someone with a friendly personality and strong communication skills.
- Only a licensed salesperson can give a guest information about the home.

Tip: Many mortgage lenders (like Lock Lending) can co-brand marketing materials and flyers with loan information and your listing details.

Listing Visibility & Open House Promotion

Promoting Your Open House

- **MLS:** Make sure the open house is entered into your MLS.
- **Realtor.com:** Automatically pulls open house info from the MLS.
- **Social Media:** Post your open house on Instagram, Facebook, and Nextdoor.
- **Reminder:** Instruct sellers to remove or secure valuables, medications, and reduce garage clutter to improve presentation and protect belongings.

Open House Tools & Tech

- Use an **iPad or tablet for digital sign-in.**
- Recommended app: **Open Home Pro**
 - Free basic version; paid version offers automated follow-up, email integration, and social sharing tools.

✓ Open House Checklist for Agents

Before the Open House:

- ☐ Enter open house in **ShowingTime** or your showing service.
- ☐ Print **MLS listing sheet** for agent reference.
- ☐ Create and print a **property flyer**
- ☐ Prepare a **sign-in sheet** (digital or paper).
- ☐ Provide **Agency Disclosures** (ensure every guest signs or document your effort).
- ☐ Include **Seller's Disclosure** and **Lead-Based Paint Disclosure** (if applicable).
- ☐ Include **Financing Info** from lender partner.
- ☐ Set up refreshments (bottled water, soft drinks, light snacks like crackers or cheese).
- ☐ Post **“Please remove shoes” sign** and provide **booties** (optional but recommended).
- ☐ Display your business cards for buyers to contact you directly.
 - *tip, lay cards and property info around in the home so potential buyers can grab it without being ‘watched’
- ☐ Turn on all of the lights and open the doors and perhaps the blinds.
- ☐ Bring:
 - o All forms in case someone wants to write an offer.
 - o **Open House directional signs.**
 - o Balloons (optional, but great for visibility).
 - o Fresh flowers (optional, but make a strong impression).
 - o Your **agent resume** – you're marketing yourself, too.
 - o Dress professionally: suit/tie for men; business dress/suit for women.
 - o Wear your **agent nametag**.

Safety First:

- Use the **buddy system**—try to never host alone.
- Lock up valuables and medications. Remind sellers in advance.
-

After the Open House:

- ☐ Shut off the lights and close blinds/doors (like you found them)
- ☐ Clean up after yourself and remove all trash to the bin outside.

Open House Follow-Up

Open houses are relationship-building opportunities. Eye contact, handshakes, and authentic conversations help you stand out.

Follow-Up Ideas:

- Send a **handwritten thank-you note to attendees**.
- Use **video email tools** (like BombBomb) for a personalized message.
- Provide an **automated neighborhood report** (Cloud CMA, RPR).
- Sign them up for **new listing alerts** based on their preferences.
- Offer a **Buyer's Guide**.
- Make a **follow-up call on Monday**.

Follow-Up Script:

"Hi, this is [Your Name] with Arterra Realty. Did I catch you at a good time?

I enjoyed meeting you at the open house on [Date]. Do you have any questions about the home on [Street Name]?

Did you tour any other homes this weekend you'd like more info about?

You mentioned you were [X weeks/months] away from making a move—is that still accurate?"

"How would you prefer I stay in touch going forward—calls, texts, or email? I want to support your search without overwhelming you. If your timeline changes, please keep me in the loop so I can help you find your perfect home."

Examples of Poor Open House Prep

Train your eye to spot red flags before buyers do. Examples:

- \$4.1M home: Patio tiles weren't grouted or fixed in place.
- \$5.5M home: Beautiful landscaping but dead, yellow lawn.
- \$4M home: Dirty pool could have been cleaned for \$100–\$150.
- \$2.5M home: Front door had visible bird droppings.
- Always inspect **entry points**, curb appeal, and **staging**—they shape first impressions.

SERVE: Your Marketing Plan.

Marketing: The Lifeline of a Sustainable Real Estate Business

Marketing is not just a tool—it's a vital foundation for building long-term success in real estate. Without a consistent and strategic marketing approach, your business risks becoming purely transactional, focused only on the next deal instead of fostering lasting relationships and long-term growth. Remember we talked about this in the section called “Roadmap of your Business”

But let's be clear. There are 2 types of marketing; marketing for a current client and marketing for future clients. If you have a Buyer or Seller you are working with, you will need to tailor your marketing efforts for these specific needs. A Buyer wants to see homes and find something that works for them. Focus your time on this, search the MLS for them and communicate with them often. A Seller will require a specific plan. You will want to work on the specific content and marketing tools that we have in Social BAY. Refer to the online training videos to help you create these. This section is for getting new clients and keeping your pipeline full.

To ensure sustainable success, begin each 12-month cycle with a **comprehensive marketing plan**. At a minimum, this plan should include **12 intentional touchpoints**—one for each month. A "touchpoint" refers to any meaningful moment of contact with your audience, such as a direct mail flyer, postcard, handwritten note, or branded item delivered by hand or shared at community events. These moments help you remain visible, build credibility, and stay top of mind with potential clients.

In addition to physical materials, you should implement a **monthly automated email campaign**. These digital touchpoints add another 12 high-value connections annually and can include newsletters, market updates, new listings, client success stories, and tips for buyers and sellers. When thoughtfully written and visually appealing, email campaigns can drive traffic to your website, increase engagement, and encourage referrals.

Think of your **marketing efforts as a layered umbrella**, covering various channels:

- **Print materials** (postcards, brochures, business cards)
- **Your online presence** (personal website, listing platforms, Google profile)
- **Social media marketing** (Instagram, Facebook, LinkedIn, YouTube, etc.)
- **In-person strategies** (open houses, community events, seminars)
- **Direct outreach** (phone calls, door knocking, pop-bys)

The secret to long-term visibility and trust-building lies in **consistency and intentional planning**. Sporadic marketing sends a message of inconsistency to your audience. A well-structured plan, executed regularly and adapted based on what's working, positions you not just as a salesperson, but as a trusted advisor and community expert.

By embracing a strategic and proactive marketing mindset, you shift your business from short-term transactions to long-term influence, referrals, and repeat clients.

Ways to Keep Your Clients Coming Back

1. **Really get to know your customers:** Relationships aren't built in a day or in one conversation. Really get to know your clients and record their "hot buttons" so you are ready. The key is to make it personal.
2. **Connect regularly:** Don't let your customers go too long without thinking of you. A good rule is to connect with your contacts every few weeks.
3. Stay in touch with community issues - Stand out as the REALTOR who takes pride in his/her community and actively participates to make it a better place.
4. **Give customers relevant real estate information:** Calendars, note pads, and fridge magnets are popular ways to stay "top of mind", but to really get your contact's attention, give them relevant, personalized information that they'll use. How about a market report showing the effect of their recent kitchen renovation on their home price? Or an update on home prices in the neighborhood they like?
5. **Set yourself apart:** Highlight trends, communities or neighborhoods unique to your city and put them in your bio. Or, start to discuss topics and don't limit yourself to one topic. Showcase various topics to show that you excel in many areas.
6. Follow up after the sale - Contact your clients after your deal closes and find out what they think of your service. If they are happy, ask for referrals.
7. **Make your client's lives easier:** People are busy. If you can make their home search or the listing process an area of calm, you'll guarantee rave reviews and referrals. Provide anxious sellers with updated activity reports that show all of the things you are doing to promote their home? Or answer your buyer's desire to understand pricing in a specific neighborhood by providing current market reports in real time?
8. **Be explicit about your value:** Today's consumers have access to more information than ever. They know list prices, they can get full property details, they can find open houses, all without a REALTOR's assistance. What they don't have is the expertise to put all of those pieces together and that's where you come in. By combining your knowledge and the current market, you can help your clients make confident buying and selling decisions.
9. **Give customers more than they expect:** Whether it's spending a few extra minutes helping a client research neighborhood schools, taking others to coffee a few times a year, or becoming the expert they can call for market research, go above and beyond what your customers are expecting. Generate a reputation of being a great real estate resource and it will pay off in repeat business.
10. **Reward your customers:** From wine to promotional calendars, there are many memorable ways to say "thank you". Often, it's these small touches that will make you stand out in the long run.

12-Month Marketing Campaign

January---New Year's
February-Valentine's/Superbowl
March-Easter/Spring
April-Spring/Time change
May-Memorial day
June-Start of Summer/End of School
July-4th of July
August-Summer
September-School
October-Halloween/Fall/Cider
November-Thanksgiving
December-Holiday/Winter

**All mailings should include:

CONTACT INFO/LOGO (picture),
WHAT YOU DO,
THAT YOU WELCOME REFERRALS

Here are some ideas to create those touch points:

- EMAIL/NEWSLETTER-market update, just listed/sold homes in the area, neighborhood news, community info
- POSTCARDS include recipes, tips, maintenance, or sports schedules or highlights
- IN-PERSON deliveries - Hershey kisses, flower seeds, flags, ice cream scoops
- MEET/GREET – go for ice cream OR bring flowers or coffee or cider/donuts
- PHONE-introduction, see if anyone they know could use a realtor, remind them of an event coming up.

YOUR Brand

You can't think of yourself as just a real estate agent. "Real estate agent" is an occupation. If you're simply treating it as a job, you're not doing anything to stand out in a market that is flooded with other agents -- agents who are competing with you for leads, clients, and commissions.

Being successful in this business is about finding customers. If you have no clients to buy or sell homes to, you're essentially unemployed. You need to have a system in place to generate the leads that will produce commissions, and the key to lead generation is a solid marketing plan.

"We are the CEOs of our own companies: Me Inc. To be in business today, our most important job is to be the head marketer for the brand called You."

-- Tom Peters Best-selling Author

So what is the makeup of your Me, Inc.? What can you do to separate yourself from the competition? This guide will get you on the right track. You'll create a Marketing Action Plan for the next year and establish the identity, message, and frequency that will lay the foundation for your brand. As your brand grows, you'll find more buyers and sellers to work with.

Create Your Message

The Unique Selling Proposition (USP) is a fundamental concept in marketing. It's a message that conveys to prospective clients that there's a specific advantage to working with you. It's what makes you unique compared to the competition.

When you think about what makes you unique, consider avoiding anything having to do with real estate or being a real estate advisor. It may sound strange, but this will put some much needed space between you and the competition.

Speaking of the competition, here are the terms they're probably using to market themselves: market expert; listing specialist; buyer specialist; investor specialist; relocation specialist; "Insert city name" specialist; local pro; and so on.

Those are fine, but what do those words really mean to customers? People do business with you for three reasons: they know you, like you, and trust you. Think about what your clients have said about you in the past, or try asking them what they liked about the services you've provided. This will give you priceless insight into what's important to them.

Example: If you worked in law enforcement for several years before moving on to a career in real estate. Your USP could be: "After 12 years of experience as a police officer; I possess unique negotiation skills that I will use to get my clients the best possible price."

In the space below, take a few minutes to work on your message. This is how you want to be seen and how you want to position yourself in a noisy marketplace. Think about why the person you are marketing to would use you instead of the hundreds of agents in your area.

This is not the time to play it safe. Think of something that will separate you from the pack.

Be different. Be remarkable. This will be your **Unique Selling Proposition.**

Consider the following questions as you develop your Unique Selling Proposition:

1. What makes you unique or different from your competition?
2. What skills do you possess that your competition does not have?
3. Is your proposition relevant to buyers and sellers?
4. Does your proposition move potential leads to act?

Write your Unique Selling Proposition in the space below.

Self Reflection:

If it Ain't Broke....

Reviewing past successes and failures is crucial as you develop your Marketing Action Plan. In this section you'll examine which techniques worked for you in the past and which ones were ineffective. Then you'll be able to focus your time and effort on marketing that will produce the best results.

Step 1: What worked?

Pull up your closed transactions from the last year and see where each client came from. Look for trends. Are the clients coming from the same sources? Do you notice a pattern? (If you're new to the business, meet with your mentor as you progress through this section.) Use the space below to make a list of how you obtained those clients.

Step 2: What didn't work?

Knowing which marketing techniques to avoid is just as important as knowing which ones work best. Make a list of the marketing activities that you received little or no return on in the past year.

Dollars and (Common) sense.

It's an old cliché: You have to spend money to make money. What financial resources will you allocate to marketing and lead generation? This step is simple, but your budget isn't a reality until you put it in writing. Planning your budget ahead of time will keep you from overspending and it will allow you to get the most out of your money. You can create a detailed budget by referring back to the section called *Roadmap of your Business*.

How much start-up cash do you have available for marketing?

\$ _____

Will you allocate a percentage or a flat dollar amount from each commission toward marketing?

\$ _____

Use the space below to list any other details about your budget.

Pick your Strategy.

In this final and most important step, you'll map out your Marketing Action Plan for the next year. You will choose which activities you'll engage in on a daily, monthly, quarterly, and yearly basis. In general, marketing as it applies to real estate agents can be broken down into two categories: **Referral Marketing and Universal Marketing.**

Referral Marketing: This is business directed to you from someone you know. It may be family, friends, past clients, or other contacts who feel comfortable referring business to you.

Universal Marketing: This is business that is directed to you from a marketing effort that reaches the general public. It's possible that these prospective clients have heard of your brand, but you do not have a relationship with them.

Lists of marketing activities from both categories follow. Read the descriptions, consider your message, experience, and budget, and then choose the activities you'll use to generate leads over the next year. Use the worksheets in the back of the guide to make a specific plan for when you'll engage in each activity.

Referral Marketing Techniques:

Structured Networking: Includes networking groups, leads groups, or other- organized networking opportunities.

Business Alliance: Partnering with other businesses to be their preferred agent.

Agent Referrals: Seeking referrals from agents outside your area.

Social Media: Sites like LinkedIn and Facebook can be a great free outlets for getting referrals.

Friends and Family: This is the center of your sphere and a consistent referral source.

Past Clients: These people are often forgotten, but they can be an excellent source of business.

Company Directed: Your office may have business opportunities that you can tap into based on relationships it has developed.

Universal Marketing Techniques:

Yard Signs: These can be sign calls from your own listings. What will you do to maximize the exposure on your signs?

Public Events: This could be booths at community events, charity, or anything else you can dream up.

Open Houses: Some agents have made their entire career on open houses, but it's not for everyone. If you do open houses, how will you promote them?

Direct Mail: Endless possibilities exist, and leads can be generated, but watch your ROI on mailings.

Farming: Build a presence in a specific neighborhood and over time become the go-to agent. This can be a long road, but for the agents who do it correctly, the rewards can be big.

Renters: Renters can be a targeted demographic of people ready to buy a home. You can broadcast messages to renters highlighting the benefits of home ownership.

Special Offers: Publicize a special offer to entice the general public to use you.

Public Education: Sponsor or provide classes to the general public. This could target first-time home buyers, investors, or sellers in trouble needing to short sale.

Craigslist: Market your services and your listings on one of the web's largest marketplaces.

Mass Media: Marketing outlets such as TV, radio, print; online, and so on.

For Sale By Owner: Contact sellers who haven't picked an agent. Can you convince them it should be you? Will they let you host an open house?

Social Media Ads: Paid advertising on sites like LinkedIn and Facebook.

Your Personal Web Site: Developing and promoting your site to get leads through the web.

Expireds and Withdrawns: Approach sellers who have recently pulled their listing from the market. Do you have what it takes to after these potential clients?

Branding: Billboards, bus benches, and just about any other paid public advertising venue.

Make Your Plan

Marketing Action Plan
(daily/quarterly/annual)

Daily

Q1

Q2

Q3

Q4

Annual

Marketing Action Plan
(month-by-month)

January	February	March	April
May	June	July	August
September	October	November	December

Social Networking Highlights

When used strategically, social networking tools can be a powerful source of lead generation, brand awareness, and relationship building in your real estate business. This section will only highlight some of the benefits of each. You need to determine your style and which platform will be the best for you

Below are key benefits and best practices for each platform:

Facebook

- Low-cost and widely used across all demographics and markets
- Humanizes your business—share client testimonials, event photos, behind-the-scenes content
- Ideal for showcasing milestones, community involvement, and property updates
- Supports photos, videos, and links (great for multimedia marketing)
- Tag friends, clients, or businesses and encourage them to share your posts
- Respond to comments and messages promptly (ideally within 24 hours)
- Include your Facebook page link on letterhead, business cards, email signatures, and your website

Instagram

- Strong visual platform—great for showcasing listings, design inspiration, and local highlights
- Follow **Instagram for Business** blog for content ideas and platform updates
- Maintain a mix of professional and personal images to create authenticity
- Use photos that tell a story or convey a lifestyle, not just features
- Connect your Instagram to your Facebook account for cross-posting
- Share short videos and Reels; embed video tours in your website
- Aim to post consistently—2–4 times per week is a good benchmark

X (formerly Twitter)

- Make sure your profile clearly reflects your identity and company affiliation
- Develop a consistent tone and message that communicates who you are and what you offer
- Engage with local influencers and complementary businesses (e.g., mortgage brokers, stagers)
- Keep the tone casual and conversational—focus on relationship-building over hard selling
- Tweet regularly (1–2 times per day minimum) to stay relevant
- Encourage followers to retweet or share your content
- Use trending hashtags to join relevant conversations and increase discoverability
- Incorporate eye-catching visuals, infographics, and short videos to increase engagement

LinkedIn

- Best platform for professional networking, referrals, and thought leadership
- Build a complete and compelling profile—include your headshot, real estate credentials, and specialties
- Post value-driven content: market trends, buyer/seller tips, success stories, or community insights
- Connect with colleagues, past clients, and industry professionals regularly
- Request recommendations from satisfied clients to build credibility
- Engage with others' posts—comment, congratulate, and share insights to stay visible
- Join and participate in local and real estate-specific groups to grow your network
- Ideal for connecting with relocation clients, investors, and professionals who may refer business

Face-to-Face Interactions / Network Events

- Always carry business cards or use a digital contact-sharing app
- Confidence matters—people respond to professionalism and authenticity
- Dress appropriately for the occasion; your appearance is part of your personal brand
- Have a well-rehearsed elevator pitch: who you are, what you do, and what makes you different
- Be genuinely curious—ask people about themselves and listen actively
- Focus on building rapport before talking business
- Know when to gracefully exit a conversation
- Don't try to meet everyone—quality over quantity
- If you're shy or new to networking, bring a “wingman” to help with introductions
- Do your homework before attending events—research attendees, topics, and organizations
- Make strong eye contact—it builds trust and connection

SCALE:

Product Knowledge: Understanding Homes to Better Serve People

Welcome to the final section of our training—*Product Knowledge*. This section is where your foundation as a real estate professional becomes something truly exceptional.

While many agents stop at contracts and client interactions, we believe that deep product knowledge is what sets *us* apart. Understanding the home—from *the ground it sits on to the finishes inside*—gives you a powerful advantage when advising clients, building trust, and standing out in a crowded market.

This section includes captioned photo references that walk you through:

- Site Descriptions
- Exterior Architectural Styles & Components
- Interior Building Materials & Features
- Kitchen & Bath Fixtures and Design Elements

These visuals are designed to build familiarity, but we'll dive deeper during our online modules and in-person sessions—where real-world application and discussion bring this knowledge to life.

This content is designed to introduce key concepts, while deeper discussion and application will happen during our *online modules* and *in-person training sessions*.

We include this section because we know real estate isn't just a transaction—it's personal. And by growing your knowledge of the product, you'll be better equipped to show compassion, solve challenges, and grow together with your clients—*living out our values in every conversation and consultation*.

At Arterra, we don't just sell homes—we understand them. This product knowledge gives you the confidence to speak with authority, offer valuable insights, and provide the kind of experience clients remember.

View the Various Product Knowledge Guides Below:

[9.1 Site Description](#)

[9.2 Exterior](#)

[9.3 Interior](#)

[9.4 Kitchen & Bath](#)

[9.5 Product Knowledge Checklist](#)

[9.6 Product Knowledge Defined](#)