



TomFerry's

FOR **AGENTS**



BEST-YEAR-EVER

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BEST-YEAR-EVER

“The realization
of *your plan* is worth
more than any
single transaction.

Refuse to let *your
business* interfere
with *your plan*—
trust the process.”

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What You Want

Income Goal:

How much money will I produce by carrying out this plan?

Revenue

Gross Commission Income (GCI)

\$

Expenses

Ref./use Expense Tracker

\$

Profit

Net Commission Income (NCI)

\$

Revenue - Expenses

Wealth

Ref./use Wealth Tracker

Savings Contribution

\$

Debt Reduction

\$

Transactions Goal:

How many transactions must I close to reach my income goal?

Sellers

Portion of Revenue

%

Average Sale Price

\$

Average Commission

\$

Total seller transactions: #

Total listings taken: #

Total listing appointments: #

Buyers

Portion of Revenue

%

Average Sale Price

\$

Average Commission

\$

Total buyer transactions: #

Total buyer appointments: #

Leases

Portion of Revenue

%

Average Commission

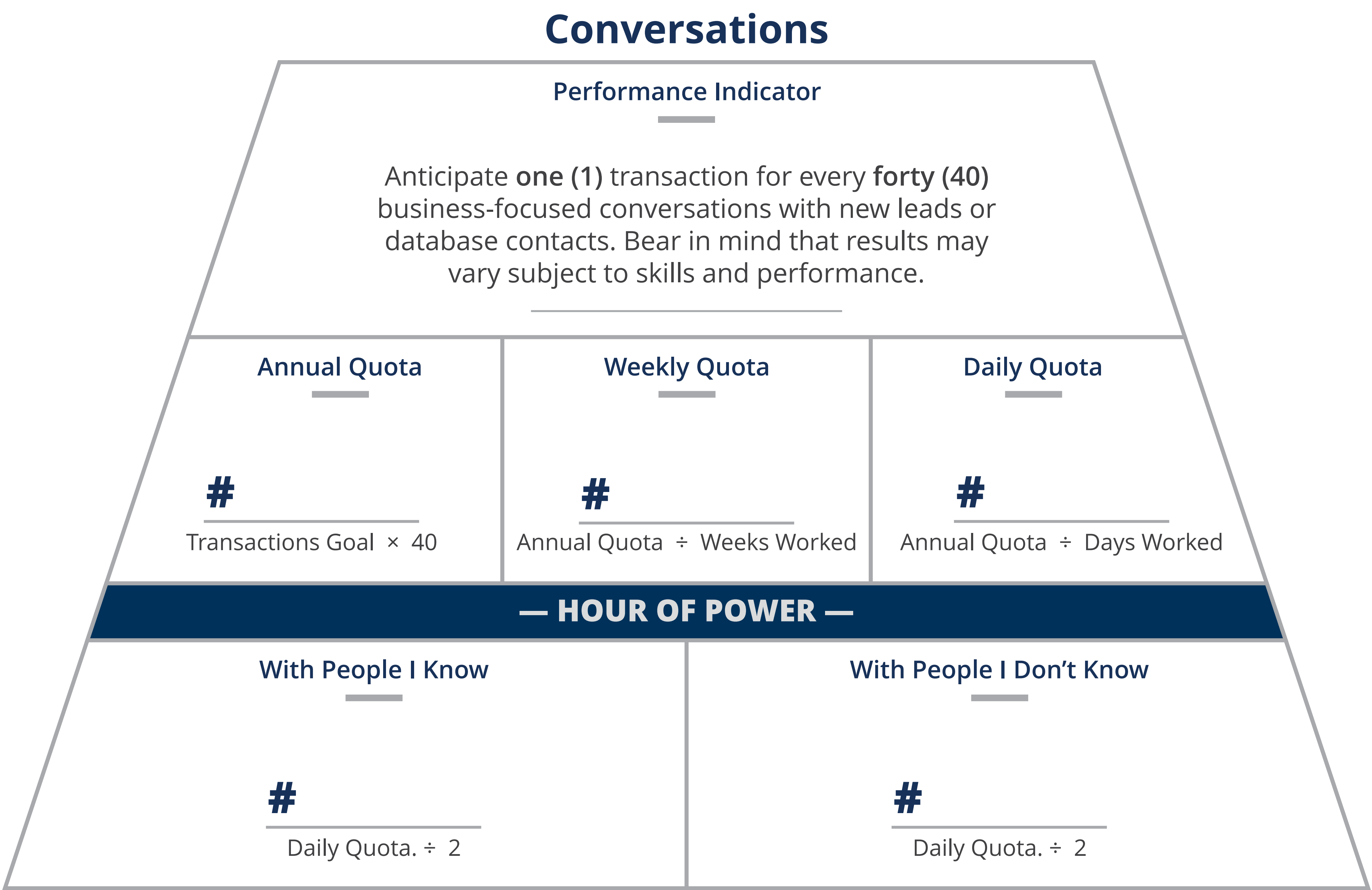
\$

Total lease transactions: #

Total lease appointments: #

Conversations Goal:

How many conversations must I conduct to reach my transactions goal?



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**“Life favors the
specific ask and
punishes the
vague wish.”**

—
TimFerriss

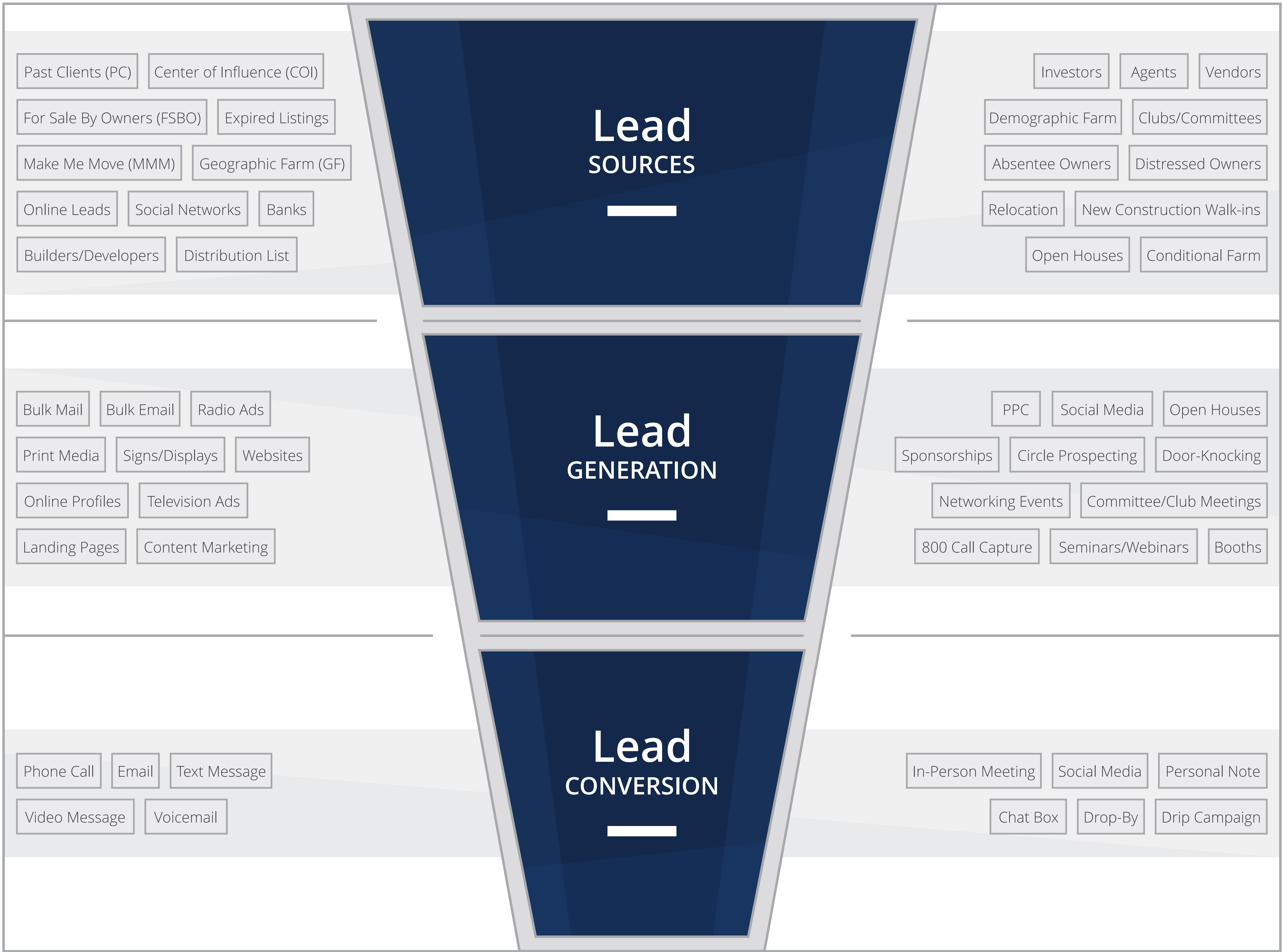
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How to Get It

Business Process:

What process will I follow to generate and convert leads?



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How to Get It

Lead Source:

What audience will I target for business?

Target Audience

- **Geographic Farm (GF) - Rolling Mill Estates (500 Residences)**

Lead Generation:

How will I generate leads from within said audience?

Marketing Plan

- Advertising to create awareness and consideration
- **24 open houses (OH) (semi-monthly)**
 - **24 OH nbrhd. previews (semi-monthly)**
 - **12 bulk mailers (monthly)**
 - **Targeted FB videos (monthly)**
 - **FB home valuation ads (weekly)**
 - **FB home search ads (weekly)**
 -

Networking Plan

- Socializing to foster referral-producing relationships
- **Annual community event booth**
 - **PTA board meetings**
 - **Community bus. assoc. meetings**
 - **Community FB Group involvement**
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Prospecting Plan

- Contacting a group of people in search of leads
- **OH neighbor invites (semi-monthly)**
 - **Circle prospecting (3 days/week)**
 - **Door-knocking (2 days/week)**
 - **Purchase Zillow/Trulia leads in GF**
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Lead Conversion:

What effort will I make to get appointments scheduled?

Follow-Up Plan

- Repeated communication with non-responsive leads aimed to elicit conversation
- **Ref./use Zillow/Trulia zip code lead follow-up plans**
 - **Ref./use FB seller follow-up plan**
 - **Ref./use FB buyer follow-up plan**
 - **Ref./use resident inquiry follow-up plan**
 - **Ref./use OH sign-ins follow-up plan**
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Nurturing Plan

- Repeated communication with responsive leads aimed to set appointments
- **Ref./use Zillow/Trulia zip code lead nurture plans**
 - **Ref./use FB seller nurture plan**
 - **Ref./use FB buyer nurture plan**
 - **Ref./use resident seller nurture plan**
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How to Get It

Lead Source:

What audience will I target for business?

Target Audience

- **Past Clients + Center of Influence (PC/COI)**

Lead Generation:

How will I generate leads from within said audience?

Marketing Plan

Advertising to create awareness and consideration

- **12 bulk emails (monthly)**
- **12 bulk mailers (monthly)**
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Networking Plan

Socializing to foster referral-producing relationships

- **1 Holiday event (annually)**
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Prospecting Plan

Contacting a group of people in search of leads

- **4 personal phone calls (quarterly)**
- **2 FB touches (semi-annually)**
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Lead Conversion:

What effort will I make to get appointments scheduled?

Follow-Up Plan

Repeated communication with non-responsive leads aimed to elicit conversation

- **Ref./use referral/repeat lead follow-up plan**
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Nurturing Plan

Repeated communication with responsive leads aimed to set appointments

- **Ref./use referral/repeat nurture plan**
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-
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How to Get It



Lead Source:

What audience will I target for business?

Target Audience

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Lead Generation:

How will I generate leads from within said audience?

Marketing Plan

Advertising to create awareness and consideration

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Networking Plan

Socializing to foster referral-producing relationships

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Prospecting Plan

Contacting a group of people in search of leads

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Lead Conversion:

What effort will I make to get appointments scheduled?

Follow-Up Plan

Repeated communication with non-responsive leads aimed to elicit conversation

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Nurturing Plan

Repeated communication with responsive leads aimed to set appointments

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**“What gets
scheduled—
gets done.”**

Michael Hyatt

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When It Happens



Optimal Day:

What does my perfect day look like to carry out this plan?

Time	Activity Description
4 AM	•
5 AM	•
6 AM	•
7 AM	•
8 AM	•
9 AM	•
10 AM	•
11 AM	•
12 PM	•
1 PM	•
2 PM	•
3 PM	•
4 PM	•
5 PM	•
6 PM	•

When It Happens



Optimal Week:

What does my perfect week look like to carry out this plan?

Time	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
4 - 6 AM							
6 - 8 AM							
8 - 10 AM							
10 - 12 PM							
12 - 2 PM							
2 - 4 PM							
4 - 6 PM							
6 - 8 PM							
8 - 10 PM							

What marketing will I do to generate leads?

What marketing will I do to generate leads?

[illegible]

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**“When your *why*
is big enough,
you will find
your *how*.”**

—
LesBrown

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Why You Want It

Driving Force:

What are my reasons for carrying out this plan?

If I Succeed

If I Fail

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Where to Improve

Personal Stability:

How do I rate the state of my preparation to carry out this plan?



Where to Improve



Personal Development:

What projects or trainings need to happen to improve myself and my business?

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

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“There is no
magic in the
magic.”

It’s all in the
details.”

—
WaltDisney

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TRANSACTION TRACKER

Past Transactions:

Where have previous transactions come from?

Lead Sources	CY Sellers	CY Buyers	CY Leases	CY Refers	FY Sellers	FY Buyers	FY Leases	FY Refers	Notes
Past Clients (PC)	#	#	#	#	#	#	#	#	•
Center of Influence (COI)	#	#	#	#	#	#	#	#	•
For Sale By Owners (FSBO)	#	#	#	#	#	#	#	#	•
Expired Listings	#	#	#	#	#	#	#	#	•
Make Me Move (MMM)	#	#	#	#	#	#	#	#	•
Geographic Farm (GF)	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
Online Leads	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
Social Networks	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
Banks	#	#	#	#	#	#	#	#	•
Builders/Developers	#	#	#	#	#	#	#	#	•
Distribution List**	#	#	#	#	#	#	#	#	•
Investors	#	#	#	#	#	#	#	#	•
Agents	#	#	#	#	#	#	#	#	•
Vendors	#	#	#	#	#	#	#	#	•
Demographic Farm	#	#	#	#	#	#	#	#	•
Clubs/Committees	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
Absentee Owners	#	#	#	#	#	#	#	#	•
Distressed Owners	#	#	#	#	#	#	#	#	•
Relocation	#	#	#	#	#	#	#	#	•
New Construction Walk-ins	#	#	#	#	#	#	#	#	•
Open Houses	#	#	#	#	#	#	#	#	•
Conditional Farm**	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
•	#	#	#	#	#	#	#	#	•
Sum Total	#	#	#	#	#	#	#	#	

CY (Current Year) • FY (Future Year)

EXPENSE TRACKER

Personal Expenses:

What is the carrying cost to operate my life?

Expenses	CY Monthly Cost	CY Annual Cost	FY Monthly Cost	FY Annual Cost	Notes
Child Care	\$	\$	\$	\$	•
Child Tuition	\$	\$	\$	\$	•
Debts - Back Taxes	\$	\$	\$	\$	•
Debts - Credit Card(s)	\$	\$	\$	\$	•
Debts - Household	\$	\$	\$	\$	•
Debts - Legal	\$	\$	\$	\$	•
Debts - Medical	\$	\$	\$	\$	•
Donations	\$	\$	\$	\$	•
Dry Cleaners/Laundry	\$	\$	\$	\$	•
Groceries	\$	\$	\$	\$	•
Health Supplies/Supplements	\$	\$	\$	\$	•
Household Supplies	\$	\$	\$	\$	•
Insurance - Auto	\$	\$	\$	\$	•
Insurance - Health	\$	\$	\$	\$	•
Insurance - Home	\$	\$	\$	\$	•
Insurance - Life	\$	\$	\$	\$	•
Investments Account(s)	\$	\$	\$	\$	•
Loans - Bank(s)	\$	\$	\$	\$	•
Loans - Mortgage(s)	\$	\$	\$	\$	•
Loans - Personal	\$	\$	\$	\$	•
Loans - Student	\$	\$	\$	\$	•
Loans - Vehicle(s)	\$	\$	\$	\$	•
Personal Coaching	\$	\$	\$	\$	•
Personal Gifts	\$	\$	\$	\$	•
Personal Hygiene/Care	\$	\$	\$	\$	•
Personal Rent(s)	\$	\$	\$	\$	•
Personal Subscriptions	\$	\$	\$	\$	•
Personal Taxes	\$	\$	\$	\$	•
Personal Travel	\$	\$	\$	\$	•
Pets	\$	\$	\$	\$	•
Restaurants	\$	\$	\$	\$	•
Utilities - Cable/Internet	\$	\$	\$	\$	•
Utilities - Gas/Electric	\$	\$	\$	\$	•
Utilities - Phone(s)	\$	\$	\$	\$	•
Utilities - Trash/Recycling	\$	\$	\$	\$	•
Utilities - Water	\$	\$	\$	\$	•
Vehicles - Gasoline	\$	\$	\$	\$	•
Vehicles - Parking/Tolls	\$	\$	\$	\$	•
•	\$	\$	\$	\$	•
Sum Total	\$	\$	\$	\$	

CY (Current Year) • FY (Future Year)

What is the carrying cost to operate my business? .

CY (Current Year) • FY (Future Year)

What is the value of everything I own minus my debts?

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Terms Glossary

- **Weeks Worked:** total number of calendar weeks less any time off (e.g. planned vacations, sick days, et al.)
- **Days Worked:** total numbers of calendar days less any time off (e.g. planned vacations, days off, sick days, et al.)
- **CY:** current year
- **FY:** future Year
- **Distribution List:** an acquired list of individuals (names, emails, addresses, or other form of contact) to whom marketing communications are able to be sent (e.g. the purchased database of a colleague)
- **Conditional Farm:** a targeted list of individuals (names, emails, addresses, or other form of contact) to whom marketing communications are able to be sent (e.g. just-listed/just-sold campaigns or mid-century modern property owners)
- **PPC:** pay-per-click advertising (e.g. Google Adwords, Facebook Ads, et al.)
- **Hour of Power (HOP):** an approximate hour during which one has conversations with people he/she knows and people he/she doesn't know, subject to daily quota of needed conversations per transactions goal.
- **Good Debt:** an investment that will grow in value or generate long-term income.
- **Bad Debt:** debt incurred to purchase things that quickly lose their value and do not generate long-term income.

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