Breakthrough 120

Part One: Session Three
Appointments

kw Where Entrepreneurs Thrive®

Participant Guide
Version 1.0

Telemarketing

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Updated 03/2026

TCPA/Do Not Call Compliance Pointers

1. **Know the Law**

- The Telephone Consumer Protection Act (TCPA) regulates calls and text messages and includes the National Do Not Call (DNC) Registry.
- Several states have their own telemarketing laws. You must follow these laws too.
- For information about the TCPA and DNC laws, visit https://console.command.kw.com/connect/learning/topics/10471
- Consult your market center or a lawyer for help with your telemarketing compliance.

2. **Get Proper Consent**

- Obtain proper consent from all consumers you call or text.
- You need prior express written consent to make telemarketing calls and texts using (1) an artificial voice, (2) a prerecorded message, or (3) an automatic telephone dialing system (which may include a dialer).
- You need prior express written consent to make telemarketing calls and texts to numbers on the National DNC Registry.

3. **Document Consent**

- Keep a record of consent from consumers and when you obtained it.

4. **Subscribe to the National DNC Registry**

- The National DNC Registry is hosted on a dedicated website (https://telemarketing.donotcall.gov/).
- • Your market center should subscribe to the Registry and applicable state DNC lists and give you login credentials and/or you should subscribe and obtain your own login credentials.

5. **Maintain an Internal DNC List**

- Consumers have a right to request that you not call or text them.
- Consumers can revoke consent at any time in any reasonable way.
- Keep a record of Do Not Call requests you receive for 5 years.

6. **Check DNC Lists Before You Call or Text**

- Before making a call or text, check to see if the number is on: (1) the National DNC Registry; (2) a state DNC list; or (3) your internal DNC list or your market center's.
- Do not rely on lead lists from 3rd parties to be DNC compliant. It is your responsibility.

7. **Honor Do Not Call Requests**

- Don't call a number on the National DNC Registry or a state DNC list unless you have proper consent.
- Don't call someone who has asked to be on your internal DNC list.

8. **Honor Calling Time Restrictions**

- Never make a telemarketing call or text before 8 a.m. or after 9 p.m. local time at the consumer's location.
- Follow any additional state law restrictions regarding when you're allowed to contact consumers located in that state.

9. **Train Your Assistants, Including Virtual Assistants**

- You are responsible if your assistants do not comply with telemarketing laws. REV. 07/11/25

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Seven Compliance Tips for AI Use in Real Estate

1. The TCPA prohibits AI-voice calls unless you have received prior express written consent from the call recipient. You must follow the TCPA and other applicable federal, state, and local laws if you want to leverage AI for use with calls and texts. Contact your attorney to ensure your compliance with applicable law.
2. Use your images compliantly—including those you upload into an AI tool and AI generated ones! Don't upload images into an AI tool unless you have the copyright owner's permission to do so. Additionally, AI companies' terms and conditions may require you to disclose if an image or person is generated by AI or altered with AI (like virtual staging), so be sure to do so if required.
3. Do not use AI to create content you wish to protect with copyright: Under current U.S. law, only human-authored works can be copyrighted, so AI-generated content is generally not protected.
4. Protect client confidentiality: Obtain informed consent before uploading client personal data or any other confidential or sensitive information into AI tools, anonymize or de-identify information if possible, and review AI providers' terms and conditions and privacy policies.
5. AI can be unreliable. You can use AI to help create content, but it's important that all the content is checked for accuracy before publishing to avoid making misleading or deceptive statements.
6. Follow all applicable advertising laws. Even if you use AI, you still need to ensure that you're following all applicable advertising rules, like including your broker's name, DBA, license, etc.
7. Keep it ethical. Avoid misrepresenting the property and your clients with AI-generated content that isn't checked. You should thoroughly review all AI-generated output and confirm that such output is factually accurate, suitable for its intended use, and complies with all applicable laws and regulations as they pertain to your intended use.

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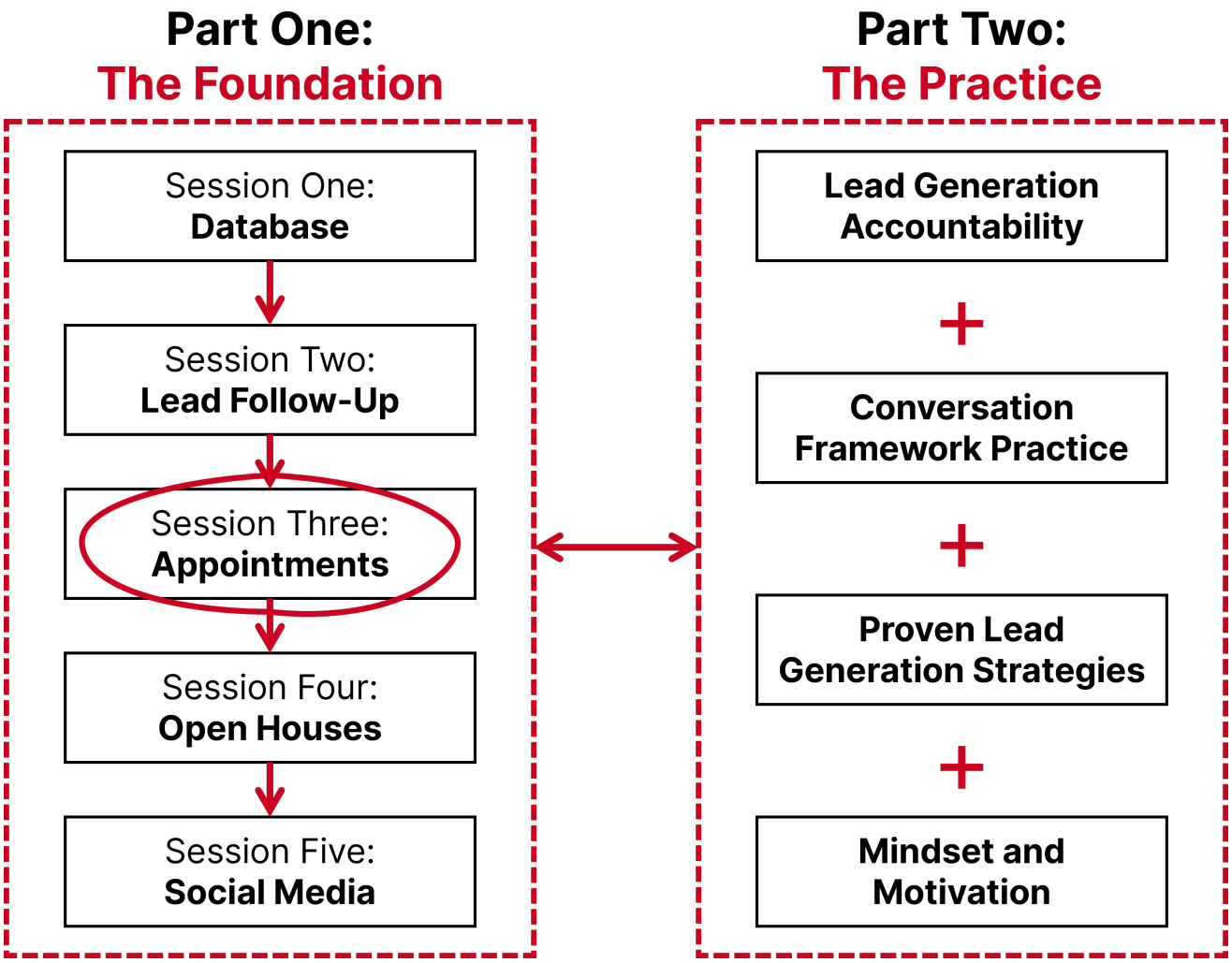
Closing 97

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Introduction

The goal of Breakthrough 120 is to have 10 real estate conversations, 5 days a week, for the next 120 days to set you up to net 9 agreements.



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Session Three: Appointments

An appointment is your opportunity to win the business of potential buyers and sellers. By following a step-by-step guide you'll be able to confidently lead a seller through a listing appointment and build trust and guide sellers to a decision.

Objectives

By the end of the third session of Breakthrough 120, you will be able to:

1. Follow a step-by-step guide to confidently lead a seller through a listing appointment.
2. Build trust and guide sellers to a decision.
3. Maximize your productivity by focusing on your most important activities during the first half of the day.

Progress Report

Number of Contacts Added to Your Database	
Number of TCPA-Compliant Calls You Made	
Number of Conversations You Had	
Real Estate Follow-Up Opportunities	
Challenges	
Aha's	

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Mindset Moment

Do one thing every day that scares you.

—Eleanor Roosevelt

Write down 2-3 fears you have and classify them as rational or irrational.

Rational	Irrational

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Mindset Moment (cont.)

Common fears about interacting with the people closest to you might include:

1. Fear of not having a track record.

2. Fear of not knowing how to answer every question about the sales process.

3. Fear of rejection when asking for business.

Prompt: Reframe Your Fears with AI

→ Act as a motivational real estate coach with a background in positive psychology. I am a new real estate agent, and I feel afraid of [insert your fear here, e.g., rejection, not knowing what to say, or being inexperienced]. Please reframe this fear into more empowering, productive thoughts. Provide me with:

1. A short, motivational pep talk that is both high-energy and soothing.
2. A reframing exercise I can do right now to shift my mindset.
3. A practical, action-oriented tip I can take today to move forward with confidence.

The Way Through Fear Is Action

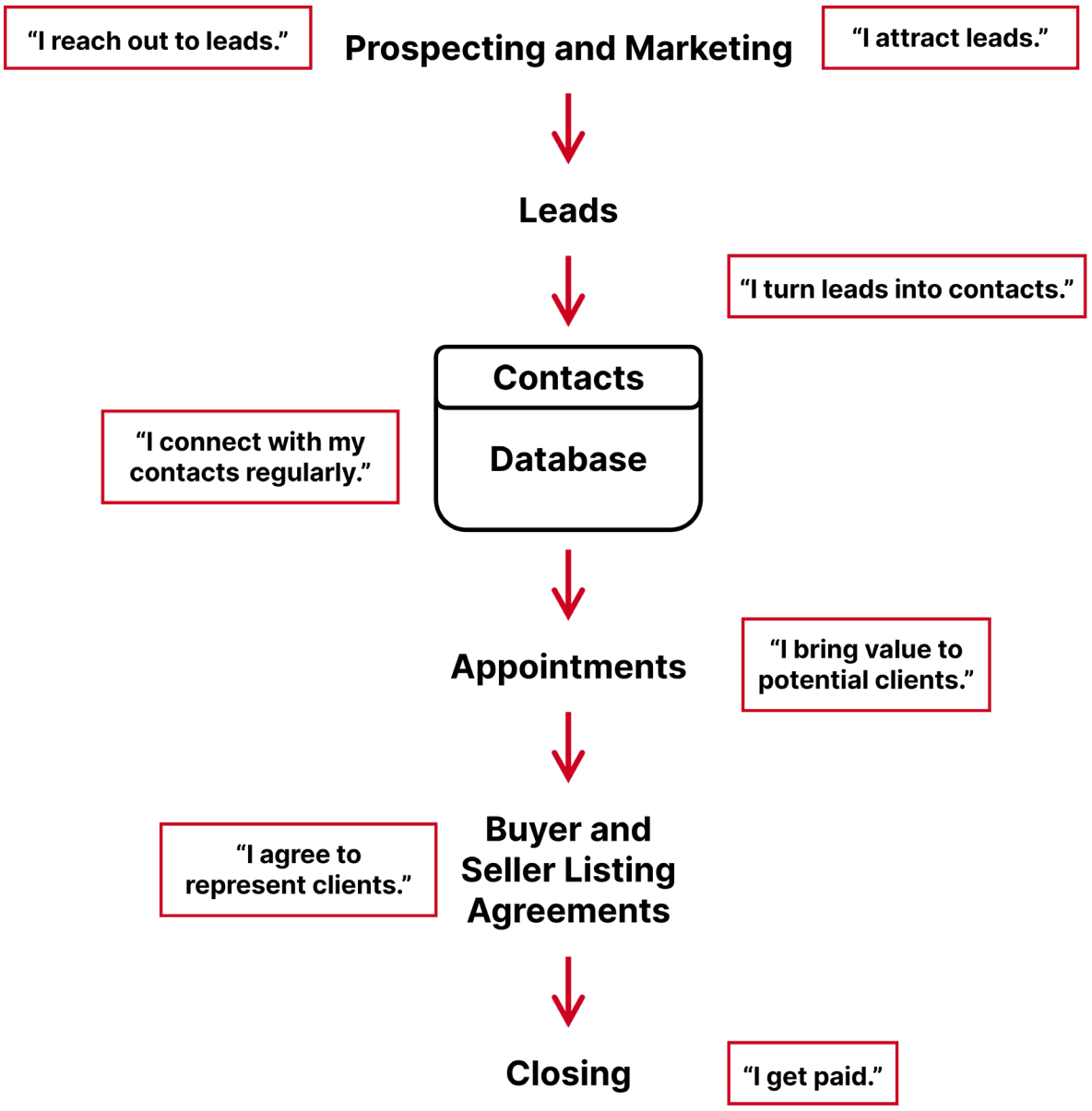
– Gary Keller

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Skill Builder: Appointments

Lead Generation Model



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Appointments

An **appointment** is a scheduled meeting where a real estate agent meets with potential buyers and/or sellers.

The **goal of the agent** during the appointment is to build trust and guide the buyer or seller toward a decision. If that decision is to buy or sell, the agent's goal is to formalize the working relationship by getting a signed representation agreement so the buyer or seller works exclusively with that agent for a given time period.

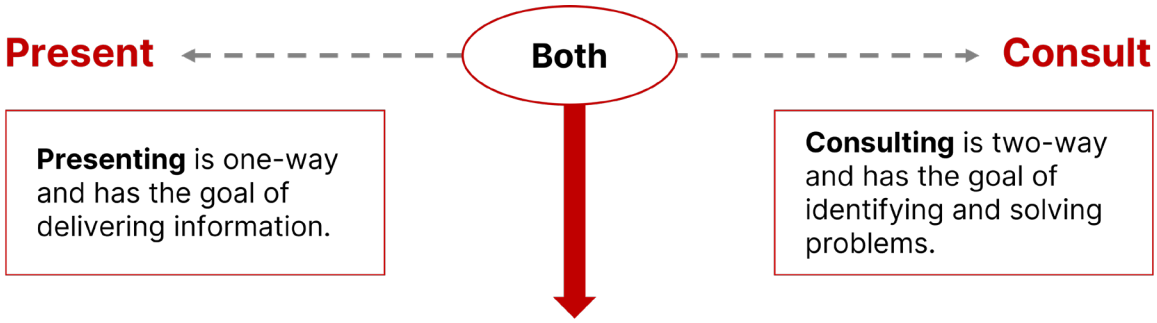
The **goal of sellers** is to net the most amount of money with the fewest hassles in the least amount of time.

The **goal of buyers** is to find the right property that meets their timing needs and get it at the best price with the fewest hassles.

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The Consultative Presentation



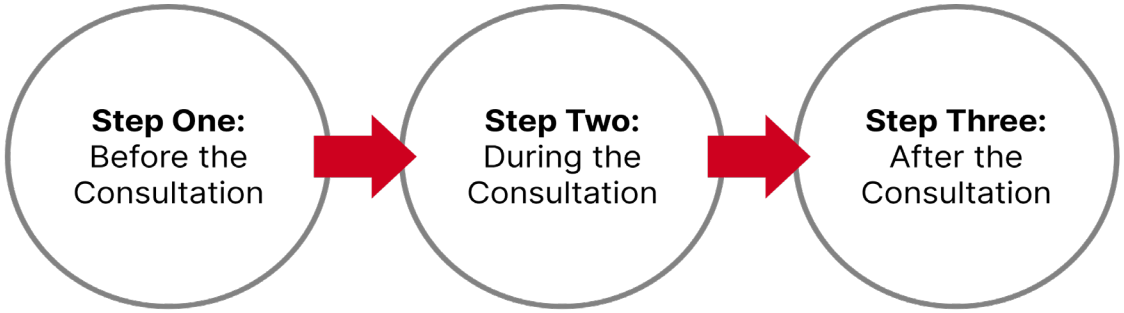
Real estate professionals do both and use sales skills to tie it all together and help clients make their best decisions.

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The Flow of the Appointment

Mastering a structured, repeatable appointment process builds the confidence and skills necessary to win clients and grow your business.



Step One: Before the Consultation

1. Prepare for the appointment
2. Arrive at the home
3. Tour the home

Step Two: During the Consultation

1. Assess the seller's goals and needs
2. Share your value proposition
3. Review the selling process
4. Discuss your marketing strategy
5. Explain your pricing strategy
6. Outline your service approach
7. Describe your post-sale commitment

Step Three: After the Consultation

1. Obtain the signed agreement
2. Establish next steps

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Best Practices—Reinforce Your Role as a Trusted Advocate

Great real estate agents serve as trusted advocates for their buyer and seller clients.

Agents typically act in one of two ways: as functionaries or as fiduciaries.

1. A **functionary** focuses on performing the tasks required of them. .
2. A **fiduciary** performs the tasks required of them and acts in the best interests of their client above all other interests, including their own. A fiduciary operates with the highest standard of integrity, care, and honesty on behalf of their client. They show this commitment by taking a consultative, client-centered approach and acting as their tireless supporter.

Top agents recognize this distinction and consistently strive to deliver true fiduciary-level service as an advocate.

To embody your role as a trusted advocate, you should do the following:

- **Prepare Thoroughly:** Prepare thoroughly and complete all research, CMA (Comparative Market Analysis), and pre-listing package assembly early. Your preparation—or lack thereof—will be evident and is the foundation of your confidence.
- **Be Honest and Realistic:** Never make the process sound easy or guaranteed. Set realistic expectations for offers, pricing, and timelines. By positioning yourself as the expert who will navigate any challenges, you build credibility.
- **Be Flexible and Consultative:** Remember that every buyer and seller is different and requires a customized approach. Be prepared to serve the individual—whether they are ready to sign before the appointment starts or need additional information and reassurance. Seize the opportunity to be their tailored consultant.
- **Dress Professionally:** Wear professional, well-pressed clothing that also allows you to move freely while touring the home. Functionality is as important as a polished appearance.
- **Arrive 5-10 Minutes Early:** Punctuality shows respect and establishes you as reliable. If you're unexpectedly delayed, call ahead immediately.
- **Introduce Your Team/Network:** Introduce other key professionals (e.g., your preferred lender, home stager, transaction coordinator, appraiser, etc.). This demonstrates you have a robust professional network ready to support a seamless, successful sale.

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Best Practices—Engage in Meaningful Communication

Winning a listing requires moving beyond the transactional. You must demonstrate that you are an active listener who is prepared to manage the process, not just execute tasks. Meaningful communication practices ensure that the seller feels heard, understood, and confident in your ability to lead.

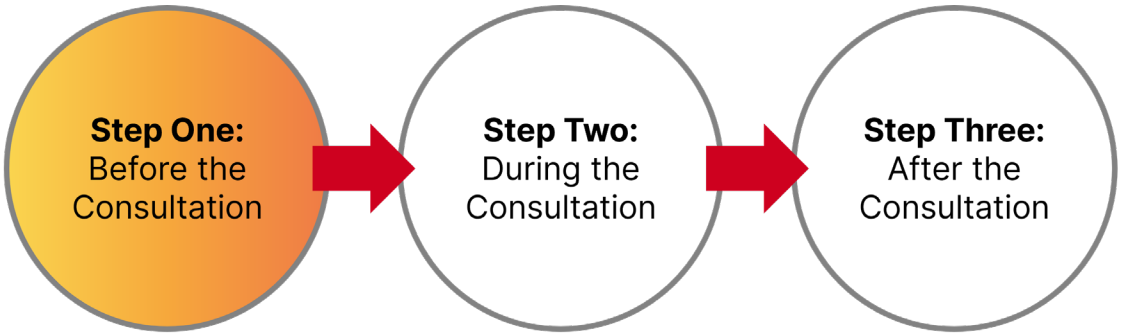
The following communication strategies build relationships, trust, and raving fans who will do business with you again and again and refer their friends and loved ones.

- **Practice:** Rehearse your conversation frameworks until they feel natural. Let your confidence stem from the clear, logical plan you present.
- **Use Clear, Everyday Language:** Avoid industry jargon. Using acronyms like MLS, CMA, or co-op creates a barrier to trust. Your job is to demystify the process; use simple language such as online listing, equity report, and buyer's agent instead.
- **Prioritize Active Listening:** The primary goal of the appointment is discovery. Listen 90% of the time during phases of the appointment like the tour and the needs analysis. The more insightful, open-ended questions you ask, the more the buyer or seller will talk, feel understood, and trust you. Take notes also.
- **Summarize Goals for Trust:** Throughout the appointment and relationship, utilize repeating back what you hear. This simple act confirms to the buyer or seller that they have been heard and provides an opportunity for corrections or clarifications.
- **Go Beyond Surface-Level Conversations:** Don't limit your questions to bedrooms and baths. Ask open-ended questions to uncover the story behind their needs, the home, and their motivation for moving.
- **Take it Slowly and Be Thoughtful:** The appointment is the foundation of your entire strategy. During the walkthrough and needs analysis, let them guide you and share information. When discussing financials, take the time for them to gain clarity. Ask further questions for clarification when needed rather than rushing past concerns. If you sense hesitation, explore it with thoughtful questions, not high-pressure tactics. Avoid rushing them, while still trying to stay on task.
- **Show, Don't Just Tell:** Use tangibles and visuals to reinforce your expertise. Demonstrate quality by showing a side-by-side comparison of a cluttered, dark photo versus a high-quality listing photo. Use visuals in your presentation to show market statistics. Print testimonials from clients. Turn abstract claims into tangible proof of your value.
- **Establish a Clear Communication Plan:** Clearly define how and when you will communicate. Provide a "My Communication Commitment" one-pager that clearly defines how and when the buyer or seller can expect to hear from you throughout the process. Examples: Weekly update calls, texts for showing requests, emails with documents.

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Step One: Before the Consultation



1. Prepare for the appointment
2. Arrive at the home
3. Tour the home

1. Assess the seller's goals and needs
2. Share your value proposition
3. Review the selling process
4. Discuss your marketing strategy
5. Explain your pricing strategy
6. Outline your service approach
7. Describe your post-sale commitment

1. Obtain the signed agreement
2. Establish next steps

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1. Prepare for the Appointment

Your listing appointment begins long before you walk through the seller's door. This preparation phase is your first opportunity to set yourself apart from the competition and set a professional tone. As a newer agent, your preparation is your superpower.

Goal

Your goal is to show the seller you are organized, respectful of their time, and already invested in their success. You're not just showing up; you're arriving as a prepared expert.

Action Plan

- **Assemble and Deliver a Pre-Listing Package:** This includes your value proposition, marketing examples, and information about the selling process. Include a one-page cover letter that specifically references their property and the goal they mentioned on the phone. This shows you were listening from the first interaction. Drop it off at their home at least 24 hours prior.
- **Confirm the Appointment:** Don't assume the appointment is still on. A quick, professional call reconfirms the details and shows you value their commitment and time.
- **Do Your Homework:** Research the property sales history, tax records, and hyper-local market conditions. Prepare a preliminary Comparative Market Analysis (CMA).
    - Conduct a Virtual Neighborhood Analysis: Your market expertise must extend beyond the four walls of the seller's home. Use a maps app and online community forums to digitally "walk" the area. Identify key amenities and school walking routes. Note the architectural styles and the general condition of nearby homes. This allows you to speak with hyper-local knowledge, showing you've done your homework and understand what makes their specific location valuable to a buyer.
    - Highlight Hyper-Local Market Data: Include a one-page analysis on their specific neighborhood. Highlight recent sales, list-to-sale price ratios, and average days on market.

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1. Prepare for the Appointment

Conversation Framework

Confirmation Call Dialogue:

Hi, (Seller Name), this is (Your Name) with (Market Center Name). I'm calling to confirm our meeting for (Day) at (Time). I dropped off a package of information for you earlier today to give you a head start, and I'm really looking forward to seeing your home and discussing how we can achieve your goals. Does that time still work for you?

Live Voicemail (if needed)**: Hi, (Seller Name), it's (Your Name) calling from (Market Center). I'm very much looking forward to our meeting on (Day) at (Time). I've just dropped off a pre-listing package at your door with some valuable information to review at your convenience. Please give me a call or text if you have any questions before we meet. See you then!**

Confirmation Text/Email (if needed)**: Hi (Seller Name). (Your Name) here, confirming our appointment for (Day) at (Time). I've left a resource package for you to review and am looking forward to our conversation. See you soon!**

What I noticed that I can apply to my business: _____

_____

_____

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_____

WARNING! You must comply with the TCPA and any other federal, state, or local laws, including for B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance and visit https://console.command.kw.com/connect/learning/topics/10471 for more information.

You cannot leave a prerecorded voicemail without prior express written consent.

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1. Prepare for the Appointment

Example of a Personalized Cover Letter:

(Your Name)

(Your Brokerage Name/Logo)

(Your Phone Number) | (Your Email) | (Your Website)

(Date)

(Seller Name'(s)) (Seller Address)

Dear (Seller's Name),

Thank you so much for the opportunity to connect about the sale of your home. I'm really looking forward to meeting with you and learning more about your goals for this move.

From what you've shared, it sounds like you're looking for a partner who can help you *(seller's goals, examples may be securing the highest possible price, navigating the process in a timely manner, and ensuring that the experience is as seamless as possible)***. That's exactly what I focus on. My approach is personal, proactive, and built around your needs so you always feel supported and confident from start to finish!**

I've included a few materials to help you get a sense of what to expect when we meet. I'm excited to sit down with you on (Date) at (Time) to walk through your goals and share the strategy I've created to get your home sold.

Talk soon,

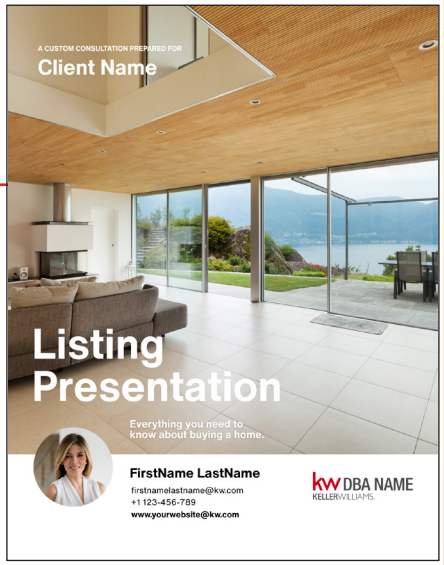
(Your Name)

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2. Arrive at the Home

You're prepared, you've arrived, and now the appointment begins. The first few minutes in the home are critical for making a strong first impression. This is not the time for you to launch into a sales pitch.



Goal

Your goal is to establish yourself as a knowledgeable professional by greeting your potential clients and thanking them for the opportunity to serve them.

Action Plan

- **Greet the Seller:** Offer a friendly, confident introduction. Smile, make eye contact, and use their name to create an immediate connection. Shake hands if offered.
- **Express Gratitude to the Seller:** Thank them sincerely for inviting you into their home and for the opportunity to meet with them. A simple, genuine "Thank you for having me over today. I really appreciate the chance to see your home." sets a positive tone from the start. Also consider bringing a small gift. A simple, thoughtful gift, such as seeds for a gardener or treats for a dog, shows you've taken the time to notice what matters to them.
- **Build Rapport:** Make a brief, natural, positive comment about the home or neighborhood to break the ice and put the seller at ease before beginning the tour. This is your potential client's home after all. They are likely proud of it. A compliment isn't just kind, it shows that you see value in their home.
- **Take Charge of the Agenda Respectfully:** You should state the purpose, provide a clear agenda, and confirm the time you have available. While you have a structured plan, stay flexible and open to the seller's needs. Remember, selling a home is a major life decision, and your empathy and attentiveness will make all the difference.

Go to your KW Canva Account, which you can access for free as a KW® associate, and search for "Modern Listing Presentation" and you'll find the Brand Template we are using here.

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2. Arrive at the Home

Conversation Framework

Appointment Kick-Off Dialogue:

Hi [Seller's Name], it's so nice to finally meet you in person! Thank you for having me over today. I really appreciate the opportunity to see your home. I love the curb appeal; you've clearly taken great care of your home.

My goal for our time together is twofold: first, for me to see your beautiful home through your eyes and fully understand your goals. Second, to share my strategic plan for getting your home sold for the highest possible price in a timeframe that works for you. I've set aside about (number) minutes for this, is that still comfortable for your schedule? To start, I would love to take a tour of your home. Does that sound good to you?

What I noticed that I can apply to my business: _____

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3. Tour the Home

The tour is essential for gathering information about the home in order to best represent the seller.

Goal

Your goal is to objectively assess the home's condition during the tour to inform the listing information, marketing plan, and pricing strategy conversation.

Action Plan

- **Request a Central Location:** Ask to leave presentation materials in the kitchen while conducting the tour, as it provides a good space for later discussion.
- **Tour the Home:** This is not just a walkthrough; it's the foundation of your entire strategy. Avoid rushing them, while still trying to stay on task. Let them guide you and share their stories about each space.
- **Utilize a Checklist:** Use a home walkthrough checklist or an MLS data input form to systematically note the property's features and condition. Use it during the tour to ensure that you don't miss key details (e.g., age of HVAC, roof, unique architectural features, etc.). Look to your Market Center and local association for resources.
- **Gather Key Information:** Collect details about the home to inform the listing description, marketing plan, and pricing strategy.

Open-Ended and Closed-Ended Questions

	Open-Ended Questions	Closed-Ended Questions
Answer Type	More than a single-word answer	A single-word answer
Response Type	Own knowledge/feelings	Specific information
Information Provided	Deeper insights	Defined information
Answer Freedom	Free-form answer	Limited set of answers
Primary Use	To invite information	To close

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3. Tour the Home

Conversation Framework

Tour Information Possible Questions:

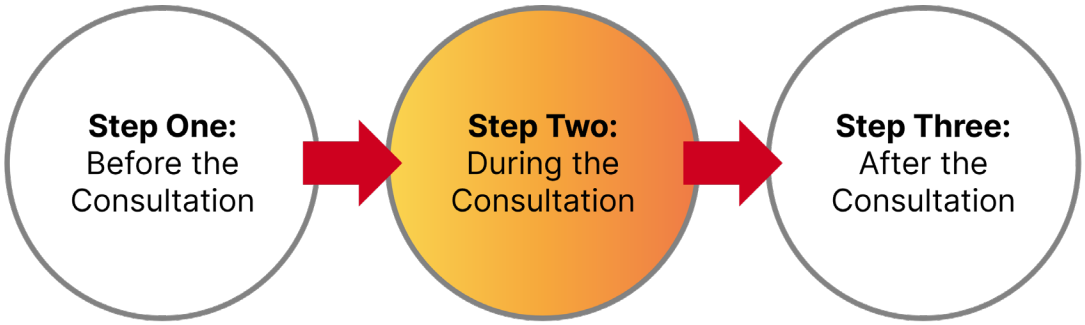
1. Thanks again for having me over. I know how much care goes into getting your home ready for a visit like this. As we walk through, would it be okay if I ask you a few questions about the home and what you've loved most about living here?
2. When you think about your favorite space in the house—the one that makes you happiest—which one is it and why?
3. How do you and your family usually spend time at home? For example, do you entertain, work from home, spend a lot of time outdoors, or something else?
4. Sounds like this home has been really good to you. What has you thinking about making a move now?
5. Tell me about the updates and improvements you've made that you're most proud of.
6. Were there any projects you were thinking of doing but decided not to before selling?

What I noticed that I can apply to my business: _____

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Step Two: During the Consultation



1. Prepare for the appointment
2. Arrive at the home
3. Tour the home

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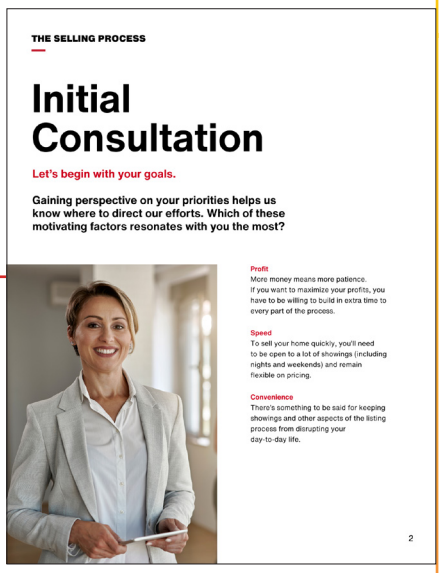
1. Obtain the signed agreement
2. Establish next steps

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1. Assess the Seller's Goals and Needs

This phase is where you transition from an agent to an indispensable strategist. Execute these steps to understand your seller's needs and goals deeply.


THE SELLING PROCESS

Initial Consultation

Let's begin with your goals.

Gaining perspective on your priorities helps us know where to direct our efforts. Which of these motivating factors resonates with you the most?

Profit
More money means more patience. If you want to maximize your profits, you have to be willing to build in extra time to every part of the process.

Speed
To sell your home quickly, you'll need to be open to a lot of showings (including nights and weekends) and remain flexible on pricing.

Convenience
There's something to be said for keeping showings and other aspects of the listing process from disrupting your day-to-day life.

2

Goal

Your goal is to shift the dynamic from a sales pitch to a strategic consultation. This is your discovery phase. You are there to listen, understand, and uncover the story behind the home and the seller's motivation. You build trust when people feel heard.

Action Plan

- **Uncover Motivation:** Your questions should help you determine what's most important to them: Price, Speed, or Convenience?
- **Listen 90% of the Time:** Let them talk. You need to take detailed notes. It's important to ask open-ended questions. Open-ended questions invite a free-form answer and provide deeper insights.
- **Summarize the Seller's Goals and Needs:** Take the time to repeat back to the sellers what you are hearing during the needs analysis. This confirms that they have been heard and allows you to get corrections or clarifications.
- **Use the Needs Analysis as the Foundation for the Relationship:** The needs analysis is not just a form; it's the core document you'll reference throughout your entire time working with the client to guide your service, build trust, and manage expectations.

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1. Assess the Seller's Goals and Needs

Conversation Framework

Assessing the Seller's Goals and Needs Dialogues:

1. Why did you ask for or agree to a meeting?
2. What prompted the move initially?
3. When would you like to sell your property?
4. Will you be buying another house after you sell this one?
5. What upgrades did you do to the outdoor areas? The indoor areas?
6. What are some of the key highlights from living there?
7. What is your experience with buying and selling real estate?
8. Tell me a little bit about what you think a fair market price for your home would be and why?
9. What first made you fall in love with this home and neighborhood when you bought it?
10. If you had to describe what life is like here in one sentence what would you say?
11. What are you most excited about when you think about your next chapter or your next home?
12. I'd love to hear about the history of this home. How long have you been here, and what's the most memorable gathering or event that's happened here?
13. Is there anything specific you've heard about the selling process that you're a little nervous or apprehensive about?
14. Thinking about the entire process, what is the single most important factor that will determine whether or not you feel successful at the end of this journey?

What I noticed that I can apply to my business: _____

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2. Share Your Value Proposition

Now, you will connect your personal value directly to the seller's needs, and then provide the proof that you are supported by a powerful brand and team. This is a one-two punch of personal connection and professional credibility.

Goal

Your goal is to build a bridge of trust by first sharing your personal commitment, and then demonstrating that, by hiring you, they are also getting the full force of your Market Center. This combination addresses their need to like you as an individual and trust you as a professional.

Action Plan

- **Share Your "Why":** Connect your personal mission in real estate to their specific situation.
- **State Your Value Proposition:** Clearly articulate what you do, for whom you do it, and how you do it differently.
- **Introduce Your Team:** Explain the support system you have behind you (mentors, transaction coordinators, title experts, vendors, marketing staff, etc.).
- **Show Market Statistics and Testimonials:** Use visuals from your presentation to show market statistics or team photos to make the concept of "proof" tangible. Use testimonials that mirror the sellers goals or potential concerns.
- **Present a "Brokerage Advantage" Fact Sheet:** Quantify your Market Center's success. Gather 2-3 powerful, local statistics. For example: your office's average list-to-sale price ratio, the average days on market for listings in their specific neighborhood, or the number of families your office helped in that zip code last year. Create a clean, professionally branded, one-page document with these numbers.
- **Present "My Commitment to You" Pledge:** Turn your promise into a documented statement of your values. Create a document that outlines your core service commitments. Presenting this document adds a powerful layer of sincerity and accountability. Include 3-5 specific promises addressing common seller anxieties. For example:

  Proactive Communication: I pledge to provide you with a detailed progress update every (Day of the week), ensuring that you are always informed.

  Unwavering Advocacy: I pledge to analyze every offer through the lens of your best interests and negotiate fiercely on your behalf.

  Meticulous Oversight: I pledge to manage every deadline and detail of this transaction with the highest level of care.

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2. Share Your Value Proposition

Conversation Framework

"I will ... so that you ..." Dialogue:

My commitment is to ensure that you have a successful and stress-free sale. To do that, I focus on three core services. First, I will conduct a detailed pricing analysis of your hyper-local market so that you can be confident we are pricing your home competitively to attract the best offers. Second, I will manage a comprehensive marketing campaign, including professional photography and targeted digital ads, so that you have the maximum number of potential buyers seeing your home. Finally, I will personally handle all negotiations so that you can be assured that you are getting the absolute best price and terms. My entire focus is on delivering a seamless experience that gets you the most money for your home.

What I noticed that I can apply to my business: _____

Role-Play

Person A will be the agent; Person B will be the seller.

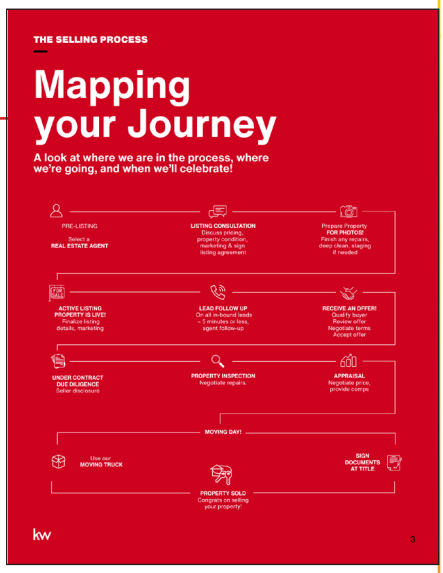
- Agent (A): Use the "I will... so that you..." Framework above.
- Seller (B): Your primary motivation is to understand how the agent's services will help you get the highest possible price for your home. Listen carefully and be ready to ask a question if something isn't clear.
- After the agent responds, the seller can simply respond with, "That sounds good. Thank you for clarifying."
- Then, switch roles.

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3. Review the Selling Process

Now, you'll demystify the journey from "listed" to "sold".



Goal

To reduce seller anxiety by providing a clear, step-by-step roadmap. You are positioning yourself as the trusted advocate who will handle all the complexity.

Action Plan

- **Present a Visual Roadmap:** Show them the stages from launching, to showing, to offers, to transaction and closing.
    - **Focus on Key Points:** Don't get bogged down in every minor detail of the 100-step process. Stick to the key milestones to reduce anxiety, not create it.
    - **Present a Graphic of the Process:** Edit the listing presentation selling process graphic to fit your market.
    - **Add Customized Timelines:** For a seller with a specific deadline (such as needing to move for a new job), create a "reverse timeline" that starts with their required closing date and works backward, showing key milestones.

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3. Review the Selling Process

Conversation Framework

Selling Process Dialogue

1. *Being an Advocate*: **Selling a home can feel complex, but my job is to make it simple and clear for you. I'm your advocate, and I use a proven roadmap to guide the journey. We'll move through a few key phases: preparing the home to attract buyers, launching a powerful marketing campaign, navigating offers and negotiations, and then moving smoothly through inspections and the final steps to the closing table. I will manage every detail on your behalf.**
2. *The No Surprises Approach*: **My goal in explaining the selling process is to ensure that there are absolutely no surprises. We will walk through each step together, from preparing the home for photos all the way to handing over the keys. You will always know what's happening now, what's coming next, and what I am doing to protect your interests along the way.**
3. *Simple Three-Phase Explanation*: **I like to break the selling journey down into three simple phases. Phase One is 'The Launch,' where we prepare and market your home to create maximum excitement. Phase Two is 'The Offer,' where we field buyer interest and negotiate the best possible terms. Phase Three is 'The Closing,' where I manage all the contractual details to get us successfully to the finish line.**

What I noticed that I can apply to my business: _____

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4. Discuss Your Marketing Strategy

You've found out the sellers' needs and motivations, you've outlined your value, you've explained the process. Now, you will detail your proactive plan to generate demand for their specific home. As a new agent, your energy and hands-on approach are your biggest marketing advantages.



Goal

To demonstrate how you will create the demand necessary to achieve their price goals using a smart, targeted, and proactive strategy. You don't need a huge budget; you need a great plan. You don't just 'list' homes; you 'launch' them.

Action Plan

- **Explain Home Preparation:** Guide them on preparing the home for its debut (decluttering, cleaning, and maximizing light) so it looks its absolute best.
- **Discuss Key Steps to Attract Buyers:** Emphasize that you will have professional photos taken that focus on the best features and tell a story; write a powerful property description that highlights the unique benefits of the home and the lifestyle a buyer will have there; and discuss the benefits of placing the home on the Multiple Listing Service (MLS), which feeds all major real estate websites.
    - **Co-Create the "Property Story"/Property Description:** Ask the seller directly: "What have you loved most about living here? What are the three features you think are the most valuable?" Explain how you'll weave these personal details into the property description to create an emotional connection with buyers.
    - **Explain Advertising and Syndication:** List the websites, social media platforms, and publications where the home will be featured.
- **Share Your Marketing Strategy:** Demonstrate how you will achieve their goals using a smart, targeted, and proactive marketing strategy.
    - **Develop a Visual Marketing Plan:** Create a visual flowchart or timeline of your marketing plan. Use Canva to create a branded, professional one-pager titled "My 30-Day Marketing Action Plan" or "Your Customized Selling Journey". Detail key milestones like "Week 1: 'Coming Soon' Campaign".
    - **Share Your Promotional Strategies:** Explain how you will personally promote the listing to all the agents in your office and your network. Discuss how you'll hold a professional open house to generate excitement and attract buyers.
    - **Show Sample Marketing Materials:** Show them a tangible example of a marketing piece created using KW's® templates (accessible in Canva through Command®). Explain that you leverage a suite of professionally designed materials to ensure that their home is presented with a polished, high-end look across all platforms. This demonstrates that they are getting the power of a major brand, executed by you.

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4. Discuss Your Marketing Strategy

Conversation Framework

Marketing Dialogues:

1. *The Launch Dialogue:* **We launch homes, not just list them, to create maximum demand for the best price. We make your home irresistible online with professional photos and staging advice. Our custom plan then targets qualified buyers through digital ads, my agent network, and effective open houses. I'll keep you informed with regular updates on our marketing and all buyer feedback.**
2. *The Two Buyers Analogy:* **To sell a home for top dollar, we need to market to two distinct buyers: the end-user who will live in the home and the agent who will bring that buyer. For the buyer, our professional photography and digital marketing creates an emotional connection. For the agent, our proactive networking and clear communication make your home easy to show and sell. We target both to create a competitive environment.**
3. *Data-Driven Approach*: **Our marketing isn't guesswork. We use data to identify the most likely buyer profile for your home, and then deploy targeted ads on social media platforms like Facebook and Instagram to put your home directly in their feeds. This is far more effective than traditional, passive marketing. I'll share the results of these campaigns with you so you can see the reach we are getting.**

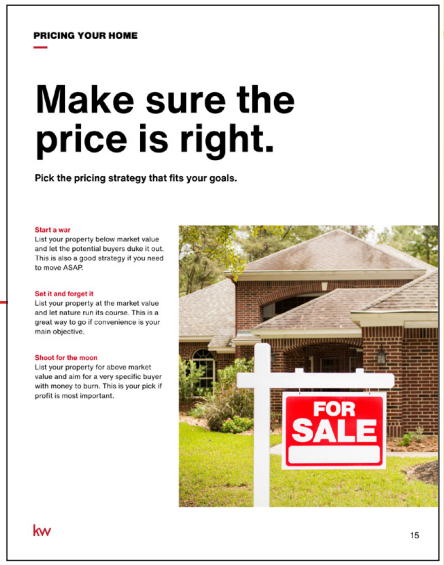
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5. Explain Your Pricing Strategy

This is the moment of truth where you shift from being a marketing expert to being their trusted financial guide. For many agents, this is the most nerve-wracking part of the meeting, and that's completely normal. Explaining how all the market data fits together for a client is a skill that you will build and improve over time. Today, you will learn the basic steps to do it with confidence.



Goal

To collaboratively analyze market data and guide the seller to an informed decision. Your goal is not to tell them the price, but to lead them to it. This is achieved through financial transparency, with the Seller's Net Sheet as your most powerful tool.

Action Plan

- **Present the CMA:** Don't just show them a spreadsheet of numbers. Use a CMA tool that displays the best 3-5 relevant and comparable properties on a map with photos. Show them the listings of the sold comps so they can see the condition and finishes for themselves. Understanding a CMA as a tool to inform clients is a skill that is developed over time and must be practiced. Seek training from your association, Market Center, or agent team for more information on CMAs.
- **Use an Absorption Rate Analysis:** Include a simple chart showing the current "months of inventory" or "absorption rate" for their specific neighborhood and price point. This visually demonstrates whether it's a buyer's or seller's market and adds a persuasive, sophisticated, data-driven layer to your analysis.
- **Remember the Seller Sets the Price:** Never dictate the price by giving a number. You should present a price range based on the data and discuss a strategy together. Your role is to be a consultant who guides them through the data. Frame it as a collaborative decision.
- **Review the Seller's Net Sheet Line-by-Line:** This is the most important document. It shows them an estimate of what they will walk away with after all costs. Take your time.

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5. Explain Your Pricing Strategy

Pricing Topics:

1. **Current Market Positioning:** Explain what you're seeing in the market and use the comps you pulled to show the values of homes currently listed and sold and how that compares to their home.
2. **Days on Market as a Function of Price:** Use the comparables to show the average days on market for their area. The lower the price in relation to the comparable properties, the faster it is likely to sell.
3. **Preparation and Price:** How a property looks and feels is heavily related to how badly someone may want it and how much they will pay for it. Repairs, staging, and cleaning are all important.

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5. Explain Your Pricing Strategy

Conversation Framework

Pricing Strategy Dialogues:

1. *The Consultant*: **This is where we function as trusted financial advisors. My role isn't to tell you what your home is worth, but to analyze the market data with you so we can make an informed, strategic decision together. I've prepared a report on your home's value, focusing on the most comparable recent sales. Based on this data, homes like yours are selling in the range of $X to $Y. Where do you feel we should be positioned to attract the strongest offer?**
2. *The Three Strategies Framework*: **When it comes to pricing, there are typically three strategies. We can price at the market, which will get us a fair amount of activity. We can price above the market, which may mean a longer time on market and fewer buyers. Or we can price just below the market to drive a flood of interest and potentially create a multiple-offer situation. Let's look at the data and discuss which strategy aligns best with your personal goals of (mention their goal, ex: a quick sale).**
3. *Focusing on the Seller's Net Sheet*: **The list price is just one number; the most important number is what you put in your pocket at the end of the day. This document, the Seller's Net Sheet, is our guide. It breaks down all the estimated costs (from taxes and title fees to how I get paid) so you have a very clear picture of your net proceeds. My goal is to maximize this bottom-line number for you.**

What I noticed that I can apply to my business: _____

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5. Explain Your Pricing Strategy

Example of a Simple Comparative Market Analysis (CMA)

STATUS	ADDRESS	BEDS/ BATHS	SQUARE FEET	SALE PRICE	DAYS ON MARKET	NOTES (for interpretation)
SUBJECT	123 Main Street	3 bed 2 bath	1,500			Updated flooring. Standard kitchen and baths. Quiet interior street.
SOLD	456 Oak Avenue	3 bed 2 bath	1,480	$440,000	28	Very similar, but this one backs up to a busy road. Our location is better.
SOLD	789 Maple Drive	3 bed 2 bath	1,525	$465,000	7	This is our high comparable. It sold quickly because it had a brand-new, fully renovated kitchen.
ACTIVE	101 Pine Circle	3 bed 2 bath	1,510	$479,900	45	This is our competition. It has been on the market for over a month, which tells us the price is likely too high for buyers.

Example Conversation Based on the Example CMA

Based on the data, we can see a clear picture of the market. The home on Oak Avenue shows us that even with a less desirable location, the value is strong at $440,000. The home on Maple Drive shows the maximum potential for a home with high-end updates, selling for $465,000. Finally, our current competition on Pine Circle has been sitting on the market, telling us that buyers feel it is overpriced.

This information suggests that the right price for your home is in the $450,000 to $460,000 range. This positions us above the home with the bad location but competitively below the fully renovated home, which will attract the most serious buyers.

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5. Explain Your Pricing Strategy

Example of a Simple Seller's Net Sheet

Description	Estimated Costs (-)	Estimated Proceeds (+)
Sale Price		$450,000
Loan and Closing Expenses		
Mortgage Payoff		
Potential Real Estate Fee*		
Owner's Title Insurance Policy		
Escrow/Attorney Closing Fee		
Prorated Property Taxes		
Other (HOA transfer, etc.)		
Total Estimated Costs	($238,500)	
Estimated Net to Seller		$211,500

Example Conversation Based on the Example CMA:

As you can see, the list price is just one number. This document, the Seller's Net Sheet, gives us a much clearer picture. Based on a sale price of $450,000, after paying off the mortgage and all the estimated costs of selling, you could expect to walk away with approximately $211,500. My entire job is to protect and maximize this final number for you.

*Commissions are not set by law or practice and are fully negotiable. There is no commission standard and pricing will vary by agent and market conditions. KW does not determine commissions and plays no role in establishing commissions.

Likewise, offers of cooperative compensation are fully negotiable and not required by law or practice. Offers of cooperative compensation must be openly discussed with your client and authorized in writing before they are made or accepted. KW plays no role in agent decisions to offer or accept cooperative compensation and imposes no requirements on agents to offer or accept cooperative compensation.

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5. Explain Your Pricing Strategy

Conversation Framework

Combination CMA and Net Sheet Dialogue:

As we look at the market data, I want to focus on the three homes most similar to yours. Let's start with 456 Oak Ave. It sold for $440,000, but it backs up to a busy road, which is a drawback your home doesn't have.

Now let's look at 789 Maple Dr. It is our high point, selling for $465,000 very quickly because it had a completely brand-new kitchen.

Finally, our direct competition is 101 Pine Cir. They are asking $479,900 but have been on the market for over 45 days, which tells us buyers feel it's priced too high.

Based on this, the market says the sweet spot for your home is between the one on the busy road and the one with the new kitchen. A strategic price range would be $450,000 to $460,000. Where do you feel we should be positioned within that range to attract the strongest offer?

Pause for imaginary discussion, and then pivot and bring out the Seller's Net Sheet.

Great. Now that we have a target price, let's look at the Seller's Net Sheet. Let's use $450,000 as our example sale price. The list price is just one number. The most important number is what you leave with after the sale. As you can see, after we account for the mortgage payoff and other costs, your estimated net proceeds are $211,500. The document breaks down all the estimated costs, so you have a very clear picture. Let's walk through it line by line.

What I noticed that I can apply to my business: _____

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6. Outline Your Service Approach

Securing the listing is just the beginning of the journey. Now you will explain how you will manage the process and communicate with them, reinforcing your value long after the appointment is over.

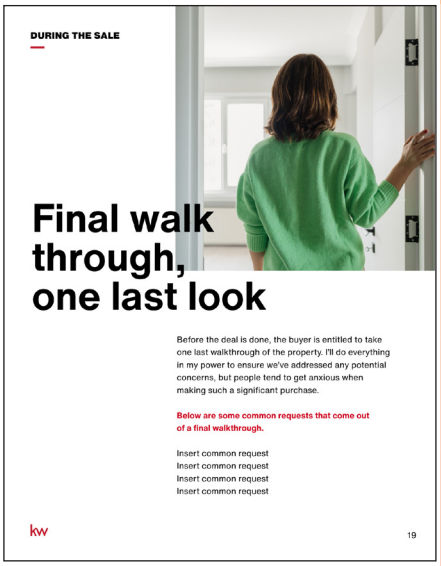


Goal

To proactively manage seller expectations and demonstrate your value as a dedicated advocated. Your communication plan is a key part of your service that differentiates you from agents who disappear after getting the signature.

Action Plan

- **Establish a Communication Plan:** Clearly define how and when you will communicate. A weekly performance report is a non-negotiable standard of your service.
- **Explain How You Manage Showings:** Detail how you will coordinate showings, gather feedback, and present that feedback to them in a constructive way. Explain your system for managing them to minimize disruption and maximize convenience for them.
- **Share a Transaction Timeline:** Give them a detailed calendar or flowchart of the “contract to close” period. Include key dates for contingencies like the inspection, loan approval, appraisal, and final walkthrough.
- **Reinforce Your Role as Their Advocate:** Remind them that you will be their single point of contact, managing all the calls, questions, and negotiations on their behalf. You will be coordinating with the title company, the lender, and the other agent to ensure that all deadlines are met. Let them know that you will review the final closing documents with them to ensure accuracy and answer any questions before they sign.



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6. Outline Your Service Approach

Conversation Framework

Service Approach Dialogue:

1. *Being an Advocate:* **When we accept an offer, my role as your advocate becomes even more critical. I will coordinate the buyer's needs to make them as convenient as possible for you. When offers come in, I will present them to you and provide strategic advice during negotiations to protect your interests. I will then take a hands-on role in navigating the inspection, the appraisal, and the final walkthrough, anticipating any issues and handling them proactively to ensure that we stay on track for a successful closing.**
2. *Setting Communication Expectations*: **During this period, communication is key. You will hear from me every (Day of week) with a proactive update, even if there's no news to share. You will never have to wonder what's going on. For showings, we will use a streamlined system that allows you to approve or deny requests right from your phone, making it as seamless as possible for you.**
3. *Navigating Negotiations*: **When we receive an offer, or multiple offers, I will present them to you in a clear, easy-to-understand format that compares not just the price, but all the terms. We will discuss the pros and cons of each, and I will provide you with my professional recommendation on how to respond to secure the most favorable outcome for you.**

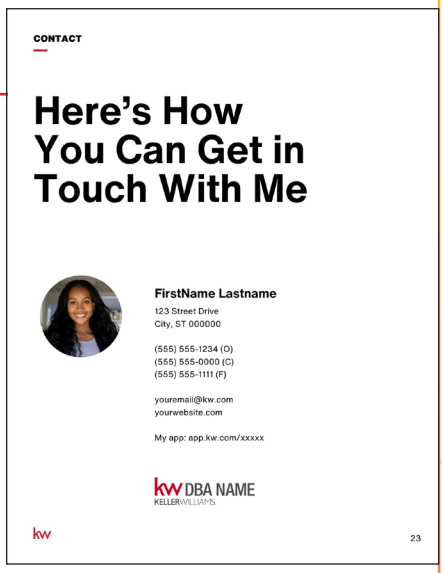
What I noticed that I can apply to my business: _____

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7. Describe Your Post-Sale Care

Every professional presentation has a clear and clean ending. This is the final, polished impression you leave with your sellers. You are acknowledging their unspoken anxieties and assuring them that you are the professional who will bring clarity to the chaos, ensuring a smooth and successful closing. This makes asking for the signature the clear, logical next step to empower you to take on that complexity on their behalf.



Goal

To provide a professional, branded closing that reinforces your identity and makes it easy for them to contact you with any follow-up questions.

Action Plan

- **Avoid an Abrupt Ending:** Don't just finish the pricing section and stop. This final summary connects all the dots and solidifies your value proposition one last time.
- **Establish Yourself as Their Real Estate Advisor for Life:** Detail how your service will follow them long after the closing.
- **Show Client Appreciation for Life:** Make it clear they are now part of your business family and will receive invitations and ongoing updates.
- **Be Honored by Referrals:** Express that it would be your honor to help their friends and family with their real estate questions and needs.
- **Be Sure the Page and/or Slide has All Contact Information:** Provide clear and complete contact information and set expectations for your availability. Ensure that your contact information page is clean, professional, and includes all relevant information: your photo, name, license number, brokerage, phone, email, and website. Include a QR code on your final page that links directly to your digital business card, or a client testimonial page, Command Landing Page, etc.
- **Prepare a Leave-Behind Folder:** Have all your presentation materials, including the CMA and seller's net sheet, neatly organized in a high-quality, branded folder that you leave with them.

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7. Describe Your Post-Sale Care

Conversation Framework

Post-Sale Care Dialogue:

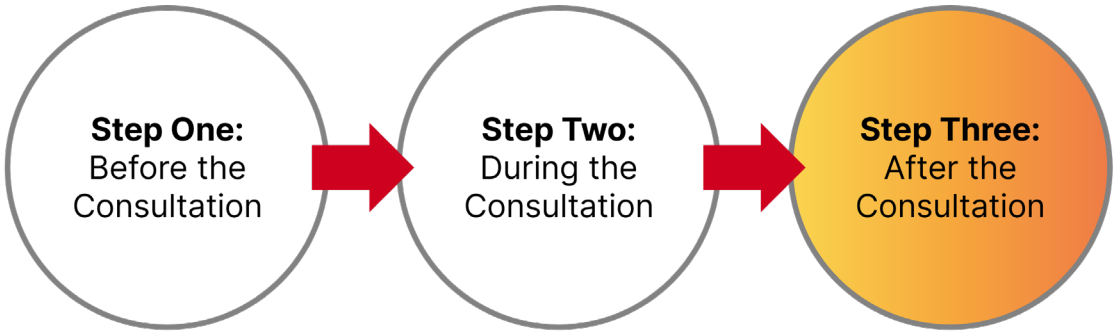
1. *Lifelong Advisor*: **My commitment to you continues long after the sale is complete. I want to be your real estate advisor for life, whether you need a recommendation for a great plumber next year or have a question about the market. My business is built on providing an exceptional level of care, and it would be my honor to offer that same expertise to your friends and family when they need a trusted agent.**
2. *The Client Appreciation Program*: **Closing is not the end of our relationship; it's the beginning of you becoming part of my client family. You can look forward to invitations to my client appreciation events, helpful home maintenance tips, and ongoing market updates. I truly value the relationships I build with my clients.**
3. *Directly Planting the Referral Seed*: **The highest compliment I can receive is a referral. As we go through this process, if you are impressed with the level of service I provide, I would be so grateful if you would keep me in mind for any friends or family who are thinking of making a move.**
4. *I'm a Resource:* **Finally, here is all my contact information. My phone will always be on for you. Please save my number and don't hesitate to text or call with any questions that come to mind. I'm here to be a resource for you.**

What I noticed that I can apply to my business: _____

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Step Three: After the Consultation



1. Prepare for the appointment
2. Arrive at the home
3. Tour the home

1. Assess the seller's goals and needs
2. Share your value proposition
3. Review the selling process
4. Discuss your marketing strategy
5. Explain your pricing strategy
6. Outline your service approach
7. Describe your post-sale commitment

1. Obtain the signed agreement
2. Establish next steps

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1. Obtain the Signed Agreement

You've presented your value, your plan, and the pricing strategy. You have answered all their questions. The final step is for you to confidently ask for the business.

Goal

Your goal is to make it easy for the client to say "yes". This isn't a high-pressure tactic; it's the logical conclusion to a successful consultation. Asking for the signature should feel like the natural next step.

Action Plan

- **Summarize Your Value:** Give a final, one-sentence summary of your promise.
- **Ask for the Signature:** You should use a confident, presumptive closing question.
- **Review the Paperwork:** Have the listing agreement ready and highlight the key sections. Have it pre-filled with as much information as possible (names, property address, etc.) to show your preparation and make the signing process faster and smoother.
- **Use Digital Signing:** Use a tablet and a digital signature platform. It's efficient, professional, and allows you to send them a copy immediately.
- **Offer an "Easy Exit" Guarantee:** Create a branded, one-sheet document that explains your service guarantee or "Easy Exit" listing agreement. This can be a powerful tool to overcome commitment hesitation.

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1. Obtain the Signed Agreement

Conversation Framework

Obtain the Signed Agreement Dialogue:

1. *Direct Close:* **Based on our conversation, I'm confident that my plan is the right one to get you to (their goal). The next step is to review the agreement, answer any remaining questions you may have, and then sign so we can get to work.**
2. *Presumptive Close*: **I've highlighted the key sections of the listing agreement here for us to review. Should we get the paperwork started so I can have the photographer scheduled for this week?**
3. *Temperature Check Close*: **As you hear all of this and see the plan we've laid out, what are your thoughts about moving forward?**
4. *Choice Close*: **It sounds like we are on the same page. Do you prefer to sign the agreement digitally on my tablet right now, or would you be more comfortable if I email it to you to review and sign this evening?**

What I noticed that I can apply to my business: _____

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Role-Play

Person A will be the agent; Person B will be the seller.

- Agent (A): Your task is to deliver a simple value summary, and then use a closing framework of your choice to ask for the signature.
- Seller (B): Respond with the objection, "This all sounds great, but we're interviewing other agents."
- Agent (A): Respond using the "This all sounds great, but we're interviewing other agents." objection handler you just saw modeled.
- Then, switch roles.

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2. Establish Next Steps

Once the agreement is signed, your job is not done. You must immediately reinforce their decision and set clear expectations for the next 24-48 hours.

Goal

To show the seller they made the right choice in signing with you, a professional of immediate, organized action.

Action Plan:

- **Provide a "Next Steps" Checklist:** Give them a physical or digital document outlining what happens next and what they need to do (decluttering for photos, repairs, hiring a cleaner, etc.). Don't leave without providing a clear, written timeline of the immediate next steps. This maintains your professional momentum.
- **Schedule the Next Key Action:** Pull out your calendar and book the next in-person appointment with them right there. This could be the photo prep walkthrough or staging consultation. Get the photography and staging consultation appointments on the calendar. This creates immediate forward momentum and shows you are a person of action.
- **Confirm Your Follow-Up:** Let them know they will receive a confirmation email from you with a copy of the signed documents and the timeline before you even get back to your office.
    - **Follow-Up Email Template:** Have a pre-written email template ready to go. As soon as you get to your car, you can customize it slightly and send it. It should recap the next steps, include a digital copy of the signed agreement, and thank them again. This is incredibly professional and efficient.
- **End on a Personal Note:** Thank them again, reaffirm your excitement for the partnership, and thank them one last time for placing their trust in you.

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2. Establish Next Steps

Conversation Framework

Establish Next Steps Dialogue:

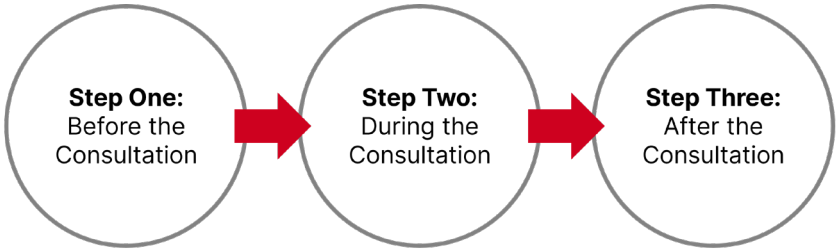
1. *Immediate Next Steps and Reassurance*: **This is going to be a great partnership. I am excited to get to work! To get us started, here is a timeline of our immediate next steps. We will have the photographer here on (Day), our target for launching on the market is (Date), and we will plan for our first open house that weekend. Thank you again for your trust. My goal is to make sure you feel informed and confident every step of the way, starting now.**
2. *Reaffirming the Partnership*: **Thank you again for this opportunity. I want you to know that you've made a great decision, and I will work tirelessly to exceed your expectations. I'll be in touch tomorrow morning to confirm the photography appointment. I look forward to our partnership!**
3. *The Clean Exit*: **I'll let you get back to your evening. You have my contact information, and please don't hesitate to call or text with any questions that pop into your head. I'll get these documents processed and send you a fully executed copy within the hour. I'm thrilled to be your agent!**

What I noticed that I can apply to my business: _____

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Conclusion: Appointments



Step One: Before the Consultation

1. Prepare for the appointment
2. Arrive at the home
3. Tour the home

Step Two: During the Consultation

1. Assess the seller's goals and needs
2. Share your value proposition
3. Review the selling process
4. Discuss your marketing strategy
5. Explain your pricing strategy
6. Outline your service approach
7. Describe your post-sale commitment

Step Three: After the Consultation

1. Obtain the signed agreement
2. Establish next steps

Learning Application

- Assemble Your Pre-Listing Package so it's ready to go.
- Practice, Practice, Practice! You must role–play the entire appointment flow. True confidence is built through repetition.
- Review the Buyer Presentation and begin to practice it as well.

Aha's

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Habit Builder: Time Block for Presentation Practice

Build a daily habit of practicing your buyer and seller presentations to build confidence and skill.

	Monday	Tuesday	Wednesday	Thursday	Friday
Morning	**MREA Energy Plan** Spiritual Physical Emotional Mental Business 1. Role-play & **Presentation practice** 2. Lead generation w/ tags, tasks, notes, and SmartPlans 3. Lead follow-up	**MREA Energy Plan** Spiritual Physical Emotional Mental Business 1. Role-play & **Presentation practice** 2. Lead generation w/ tags, tasks, notes, and SmartPlans 3. Lead follow-up	**MREA Energy Plan** Spiritual Physical Emotional Mental Business 1. Role-play & **Presentation practice** 2. Lead generation w/ tags, tasks, notes, and SmartPlans 3. Lead follow-up	**MREA Energy Plan** Spiritual Physical Emotional Mental Business 1. Role-play & **Presentation practice** 2. Lead generation w/ tags, tasks, notes, and SmartPlans 3. Lead follow-up	**MREA Energy Plan** Spiritual Physical Emotional Mental Business 1. Role-play & **Presentation practice** 2. Lead generation w/ tags, tasks, notes, and SmartPlans 3. Lead follow-up
Afternoon	*Listen to the MREA and ONE Thing Podcasts*				

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Closing

Aha's

Learning Application

1. Review the buyer listing presentation.
2. Time block for your daily presentation practice.
3. Practice both your buyer and seller listing presentations.
4. Continue reaching out to the people who know, like, and trust you until you have had at least 10 real estate conversations.
5. Be sure all contacts you reached out to today are in Command®—even if you didn't get to speak with them. Add tags, tasks, and SmartPlans to each contact. Make sure you have proper consent if your SmartPlans will include calls or texts.
6. Be ready to share your progress report at the beginning of our next session.
7. Every session, we will share our lead generation progress. You'll report:
   - 7.1 Number of contacts you added to your database
   - 7.2 Number of TCPA-compliant calls you made
   - 7.3 Number of real estate conversations you had
   - 7.4 Real estate follow-up opportunities
   - 7.5 Challenges
   - 7.6 Aha's

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