

Success Series: Mastering Modern Real Estate

Sphere Mastery: Unleashing Opportunities and Staying Relevant in Your Network



Your Host:

Natalie Urianza
Director of Marketing,
Voice of the Customer



Today's Agenda:

- Quick Recap - Homework
- Consumer Lifecycle
- Managing a Book of Business
- 6 Fundamental Steps
- What's Next?

Featured Guest **Jack Markham**



Jack is an experienced real estate expert with a career spanning over 20 years. He is also a skilled public speaker and frequently presents at industry conferences all over the world. His topics of expertise include sales development, marketing lead development, and building long-term customer relationships.

Jack is also the mastermind behind Market Leader's Million Dollar Pipeline Program, a highly successful coaching program designed to help real estate agents establish a strong foundation for long-term success. In recognition of his innovative contributions to the industry, Jack received the 2019 RISMedia Newsmaker award. He was also previously honored with the HousingWire Rising Star award earlier in his career.

Housekeeping:

- **Welcome to this exclusive 6 part series!**
 - You are registered for all 6 sessions in this series
 - Each webinar is being recorded
 - You will receive all 6 recordings at the end of the series
- **Introducing Tactical Thursday's**
 - Register for the follow-up classes for you
 - Need a deep dive? Join Tactical Thursday for a corresponding session
- **Exclusive Perks**
 - Each session will unlock an exclusive perk for attendees only!
 - You will receive access to these perks at the end of each session
 - You will receive all perks along with the session recordings at the end of the series

Webinar Schedule

Wednesdays @ 9 am PT / 10 am MT / 11 am CT / 12 pm ET

Each Webinar is 1 Hour

- ~~April 03 | Unlocking Success: Mastering Lead Generation in Today's Market~~
- ~~April 10 | Lead Nurturing Mastery: Strategies to Convert, Connect, and Close in Today's Market~~
- ~~April 17 | Social Influence Amplified: Building Your Brand and Pipeline with Savvy Social Media Strategies~~
- ~~April 24 | Live from UNITE! Power Users Share Secrets~~
- ~~May 01 | Elevate & Dominate: Next Level Strategies for Brand Building Success~~
- **May 08 | Sphere Mastery: Unleashing Opportunities and Staying Relevant in Your Network**

Business Planning

Success Series Perks

© 2024 Inside Real Es

Find Your Focus Areas

Focus Area	Change Needed
Lead Generation	
Lead Engagement	
Marketing and Branding	
Referrals	

© 2024 Inside Real Estate



Exclusive Perk Session 5:

Business Planning Worksheets



2024 Foundation for Growth



Be Found



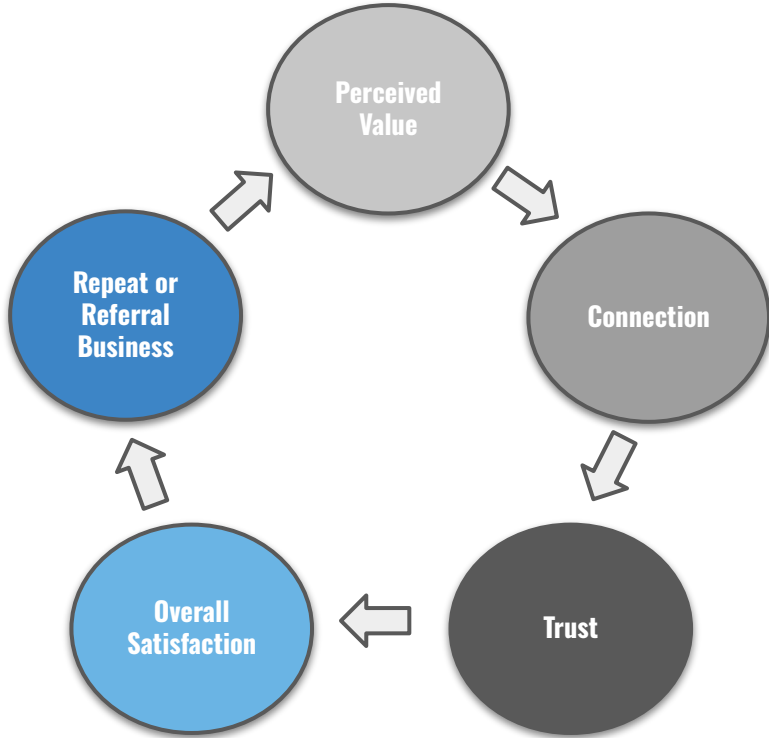
Be Connected



Be Involved



Consumer Lifecycle



“A dismal **17%** of homeowners actually use their agent again, according to a consumer panel at Real Estate Connect San Francisco. Real estate agents are on the go, busy, and **do not have the time to regularly follow up** with clients.”

- Inman

“**39%** of sellers who used a real estate agent found their agents through a referral by friends or family, and **26%** used the agent they previously worked with to buy or sell a home.”

- 2023 Profile of Home Buyers and Sellers
(National Association of REALTORS®)

Managing a **Book of Business**

What does it mean to manage a book of business?

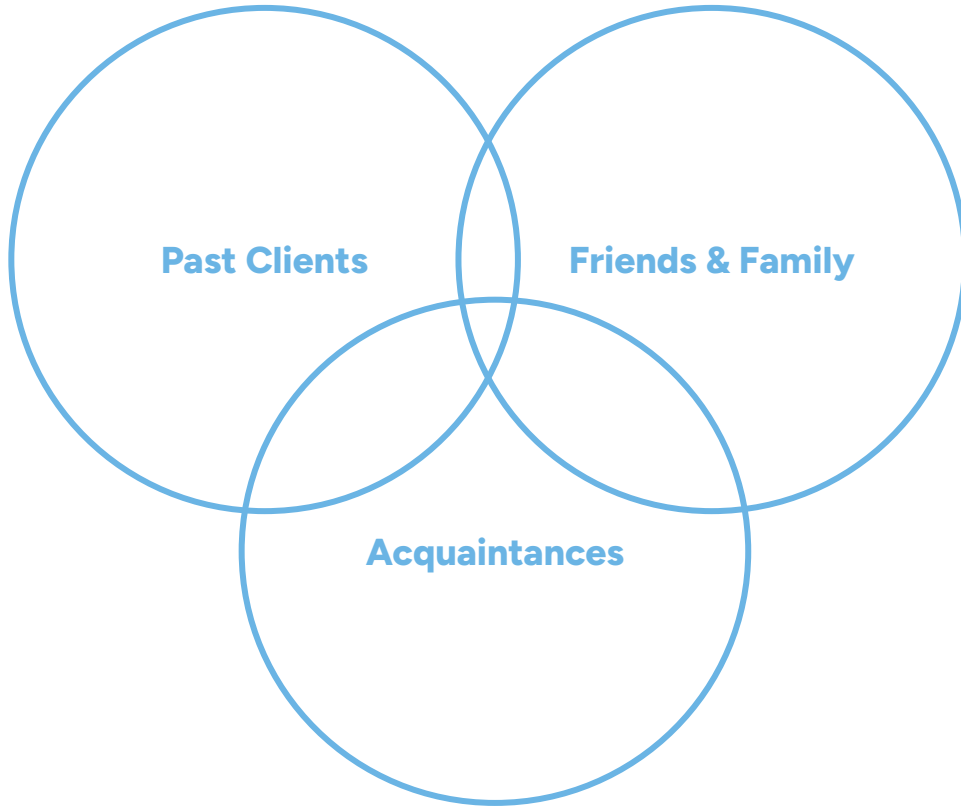
A book of business represents **a list of clients or accounts you manage as part of your business**. This database can help you organize and keep track of your current and previous clients. An organized client list can help you maintain positive relationships and make more effective decisions.

Managing a **Book of Business**

**“Most people think they lack
motivation when they really lack
clarity.”**

- James Clear, Author, Atomic Habits.

Unlocking Your Sphere

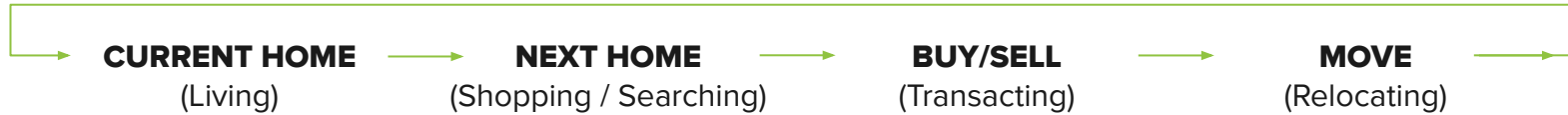


Your sphere of influence consists of **all of your connections** as a real estate professional. These people already know, like and maybe even trust you.

1. Add everyone to your CRM
2. Announce yourself
3. Stay engaged

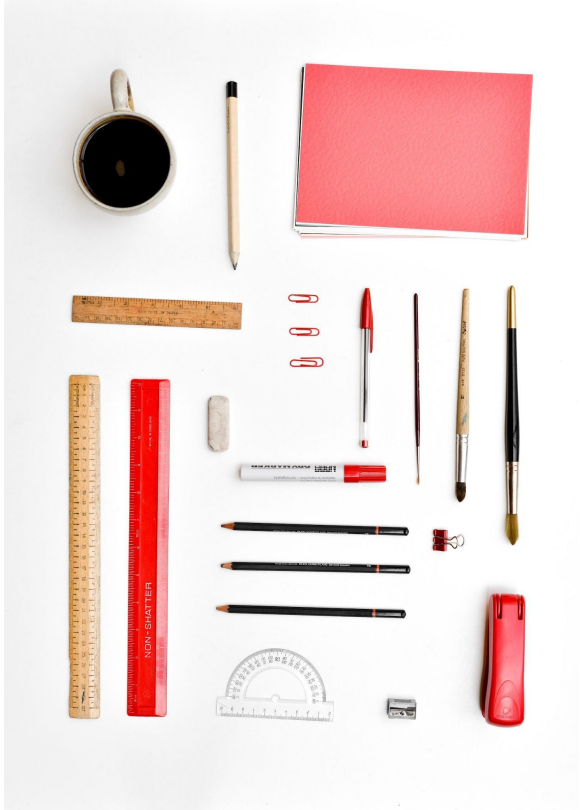
The Real Estate Lifecycle

IS LONG & FULL OF ATTRITION



- Consumers transact every 5-7 years
- Clients want to work the same agent but few do
- Personal database is gold mine but under-utilized
- Offering value through the lifecycle is hard

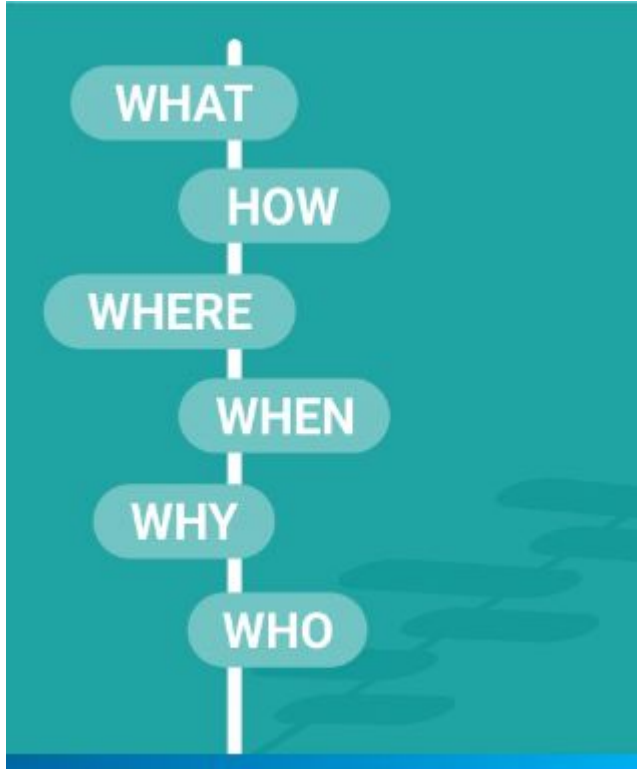
Step 1 - Get Organized



Organize your database:

- **Identify your consumers timeline**
 - Phase 1, Phase 2, Phase 3, Phase 4
- **Segmentation** - Discover important information you can use to segment your contacts
 - Lead Type - Buyer, Seller, Investor
 - Home attributes - Pool Homes, No HOA, 55+, Vacation home
 - Demographic desires - location, upsize, downsize, neighborhoods.
- **Label with Hashtags**
 - Easy identification,
 - Locate using filters and
 - Automated and manual communication

Step 2: Communication Plan



The more you understand your sphere & network the more opportunities you will unleash. Ask yourself these questions when creating your communications plan:

- **Audience** - Who am I addressing? (Segment & Timeline)
- **Cadence** - How often should I communicate?
- **Value** - How can I better serve my consumers?
- **Brand** - What do I want them to think and feel?
- **Interaction** - How do I want them to engage with my business?
- **Delivery** - What communication channels are most effective?

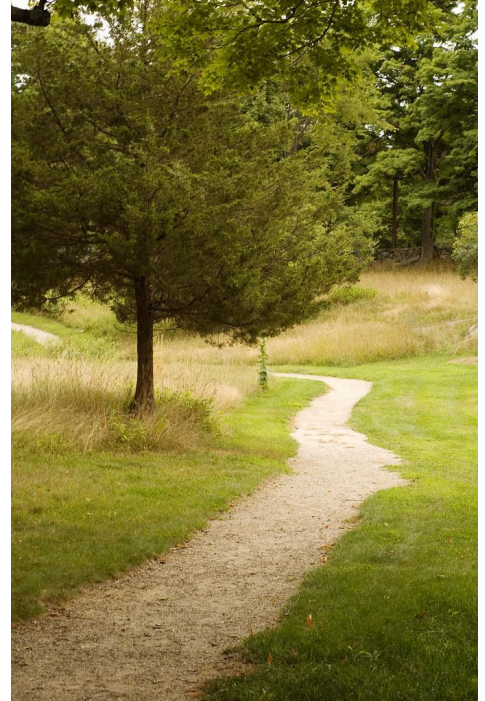
Step 3: Provide Relevant Content

Phase 1: Pre-research	Phase 3 - Buying Selling
<p>Consumer</p> <ul style="list-style-type: none">● Gathering information● Not ready to talk <p>Agent</p> <ul style="list-style-type: none">● Stop their search● Search Alert, Website, Pictures and Details of Homes● Prospect Smart Campaign	<p>Consumer</p> <ul style="list-style-type: none">● Active communication● Ready to list or make offers <p>Agent</p> <ul style="list-style-type: none">● Educate consumer on market conditions● Gather additional info from networking and other agents● Set buying/selling expectations
Phase 2: Active Research	Phase 4 - Post Close
<p>Consumer</p> <ul style="list-style-type: none">● More active in their search● Ready to start talking <p>Agent</p> <ul style="list-style-type: none">● What to expect● Buyers agreement● Listing presentation● Tiered Pricing	<p>Consumer</p> <ul style="list-style-type: none">● Transitioned to Homeowner Journey● Settling in● Renovation● Looking for potential next home or vacation home <p>Agent</p> <ul style="list-style-type: none">● Making connections in your network● Providing market information● Ask for reviews & testimonials

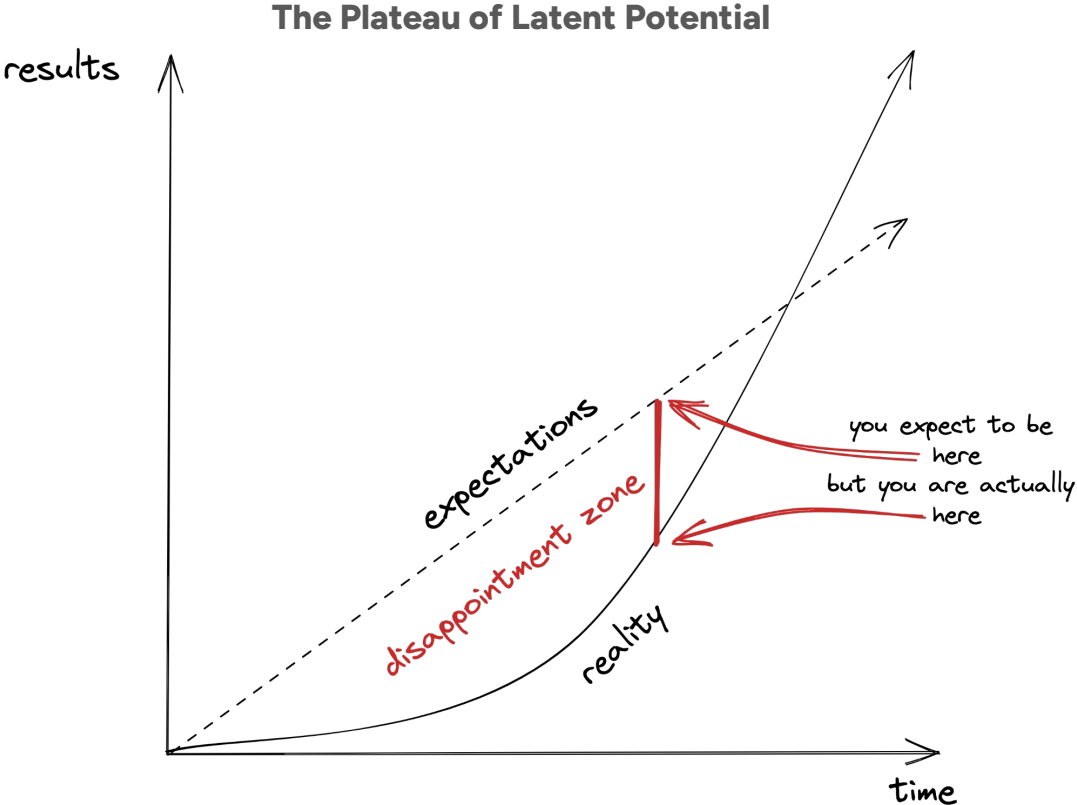
Step 4: Shape the Path

Get more engagement from your Call to Action or CTA by getting specific. Here are some things to consider:

1. **Desired Outcome** - What do I want from this interaction?
 - a. A Response
 - b. A New Lead
2. **Open Ended Questions** - What questions will instigate a response?
 - a. What information are you having a hard time finding on your own?
 - b. What are your favorite neighborhoods?
 - c. What is the deal breaker for you?
3. **Clear Direction** - Is the action easy to understand and complete?
4. **Perceived Value** - Is the value to the client clear to the client?



Step 5: Be Consistent & Patient



Step 6: Add Value

- Presentation
- Years of experience
- **Understand consumers timeline**
- Pitch
- **Listen & tailor the experience**
- Marketing plan
- **Consumers feel seen & heard**
- **Connection**



“When you engage in common practices you become common”

- Chris Voss CEO, Founder, Instructor, and Keynote Speaker



Action Items:

- **Join us tomorrow**
 - Tactical Thursday!
 - May 9th @ 9am PST
- **QR Code - Download the series landing page**
 - Watch any sessions you missed
 - Download and complete all of the perks/worksheets
- **Social Media Contest - Enter to win!**
 - \$50 Amazon Gift Card
 - Join the FB Discussion Group if you haven't already
 - Post your favorite moment or take-away from the series
 - Use #SuccessSeries to enter

