

 **INNOVATE**
REAL ESTATE

ROADMAP

FOR NEW AGENTS



Business Planning

| Set 30, 90, and 365 day goals

Start with what you want to achieve in the next 30 and 90 days, then map out what success will feel like after one year.

30-DAY GOALS

- ☐ Select a brokerage
- ☐ Create a basic marketing plan
- ☐ Set daily goals for prospecting and networking
- ☐ Explore technology solutions
- ☐ Announce your entry into real estate
- ☐ Attend all of your brokerage's training
- ☐ -----

90-DAY GOALS

- ☐ Find a mentor
- ☐ Develop your online brand and presence
- ☐ Learn how to set up and use your tech tools
- ☐ Set year one production goals
- ☐ Run an open house
- ☐ Attend a listing appointment
- ☐ Practice price-setting and CMA's
- ☐ -----
- ☐ -----

365-DAY GOALS

- ☐ Sign your first buyer client
- ☐ Run ____ total listing presentations
- ☐ Win a client via open houses
- ☐ Run a local ad campaign and measure ROI
- ☐ Master your tech tools
- ☐ Analyze your metrics
- ☐ -----
- ☐ -----

Business Planning

| Find a mentor

Need someone to show you the ropes in real estate? Here's how to find the right mentor as you grow your business.

WAYS TO FIND A MENTOR

- Ask your broker if they will pair you up with a generous, high-producing agent.
- Pay attention to productive, overworked solo agents. Ask if they need help with data entry, open house setup, marketing, or picking up client gifts.
- Speak up at your meeting and events. Share the specific experience you lack. Whether it's market analysis, building a marketing plan, or turning leads into clients, a specific request may help you find a long-term mentor.
- Follow local agents with a strong web presence. Ask them out to coffee to discuss their marketing strategy and how they measure digital ROI.
- Cast a wide net by attending every event you're invited to, whether held by your brokerage, MLS, association, or vendor partners.
- Find agents who have achieved your ideal place in the market, whether as a solo agent, a rainmaker for a big team, or an expert in a certain property type. Ask if they will share what they wish they'd known when starting out in real estate.

What to expect from your mentor:

- ✓ Guidance and practical advice
- ✓ Pre-scheduled time
- ✓ Accountability
- ✓ Help with goal setting

What not to expect or ask for:

- ✗ A playbook for success
- ✗ 24/7 or real-time availability
- ✗ Easy-win client opportunities
- ✗ Guarantees or promises

Branding and Marketing

| Build your brand identity

As a new agent, you'll want to leverage your brokerage's brand while also ensuring you stand out as a local, knowledgeable professional.

CREATE A BRAND KIT

- **Logos:** Most brokerages will have Brand Standards or Brand Usage Guidelines with instructions for when, where, and how the brokerage's logo must be used.
- **Headshots:** Get 1-2 professional headshots, plus 5-10 more lifestyle or casual options to use across your marketing and social media.
- **Short Bio:** Write out a 2-3 sentence bio that shares your market specialization, the value you offer clients, and one personal detail about yourself.

WRITE YOUR BUSINESS BIO

You'll also need a longer bio to include on your website, in printed marketing brochures, and other places. Answer the most resonant questions below, then organize your answers into a bio.

- What is your favorite part of working in real estate?
- What personal or professional experience led you to become a real estate agent?
- Who is your ideal client?
- How does your personality help you in your career?
- What do you offer your clients that no one else will?
- What local markets or areas do you know best?
- Where do you like to go for vacation or for fun?
- What is your favorite local haunt for food, drinks or coffee?
- What other clubs or organizations do you belong to? What hobbies do you have?

Branding and Marketing

| Choose your ideal marketing channels

It's tempting to build an account on every single digital platform, but consistency is key. To build a strong online presence, start slow.

SELECT YOUR FIRST TWO PLATFORMS:

YouTube is the **second-largest search engine** and a great platform for sharing long-form video content. It's ideal for virtual property tours, educational videos, and real estate market insights.

Facebook is **one of the largest social media platforms** with a diverse user base. It offers various tools for businesses, including pages, groups, and advertising options. It's a great platform for building community, sharing content, and engaging with potential clients.

Instagram is **a visually driven platform** known for photos, short videos, and Stories. It's ideal for showcasing beautiful property images, behind-the-scenes content, and creating an aspirational brand.

Pinterest is **a visual discovery and inspiration platform**, often used by people searching for home decor, design ideas, and real estate advice. It's a great tool for long-term content that can be saved and revisited.

Snapchat is known for its **short-lived content**, mainly consumed by younger audiences. It's great for creating informal, behind-the-scenes content that feels personal and engaging.

LinkedIn is **a professional networking platform**, primarily used for B2B interactions. It's ideal for building a professional reputation, connecting with other industry professionals, and showcasing your expertise in real estate.

TikTok is known for its **short-form video content** and has a predominantly younger audience. It's a great platform for creative, engaging content and viral trends.



In addition to social media platforms, be sure to fill out your profiles on **Zillow, realtor.com, and other national real estate portals**. Use the headshots and bios you created to ensure your personality and brand value are clear.

Professional Skills and Knowledge

| Learn your metrics

Here are the data points you should know about your business, now and in the future.

COMMISSION TERMS FOR AGENTS:



Sales volume: The sum of the property sales you've transacted within the year. This includes the sales prices on your listings, as well as the sales prices of homes where you represented the buyer.



Gross commission income (GCI): The sum of your commission checks for the year. Depending on your compensation structure, you may retain a higher percent of each commission after you reach a certain annual GCI.



Average commission per sale: How much commission you make from an average transaction. You may wish to add on specific services (including ads, staging, or drone footage) if you land a property that will drive in a much higher commission than your average.

SALES TERMS FOR AGENTS:



List-to-sale price ratio: How close the final price of a home was to its original list price. A higher ratio means that you accurately predict how the market would react to your listed properties.



Average days on market (DOM): How many days a property has been listed on the MLS. While this can vary depending on the market and the condition of the property, your goal should be for properties to be under the local market average for DOM.



Average sales price: The average price of closed properties in which you worked with the buyer or seller. Can be used to determine your "sweet spot" in the market—starter homes, mid-sized homes, luxury properties, etc.

Professional Skills and Knowledge

| Practice setting a price

The key to a comparative market analysis (CMA) is to help the seller understand how their home fits into the market—and how buyers may respond to it.

MANUAL STEPS TO **SETTING A PRICE:**

1. _____

Pull comparable properties (comps):

Go through your MLS and pull out 3–5 properties that match the property in question, with the same or similar number of beds, baths, square footage, garage stalls, and location. Try to use homes that have sold in the last 60–90 days, if possible.

2. _____

Tour and note the home's condition:

Is this property a fixer-upper, or has it been well-maintained and updated? Does it match what today's buyers are looking for? Is it in an ideal or not-so-desirable location?

3. _____

Analyze the current market:

Have a lot more homes come on the market since these comparable properties closed? Are sellers seeing heightened activity or less interest in recent weeks? Have interest rates and average DOM gone up or down?

4. _____

Assess and set a price (or range):

From there, review all the data you have and determine what your recommended price would be for the seller. If you aren't feeling confident, ask your mentor or broker to review your analysis and final recommendation.

Technology and Productivity

| Learn your provided tech options

As a real estate agent, you may have access to a host of technology products that your brokerage, association, or MLS is paying for.

STEP 1

Ask about tech options

First, find out what technology your brokerage provides for their agents. Your local MLS or association may also offer members technology tools so be sure to reach out to them to get a clear picture of all the technology available to you.

STEP 2

Learn and Understand what each app does

In order to be efficient and productive, you will need to understand the roles each piece of technology plays. This may be done during your onboarding process, but if not, schedule a time with your broker to go over it.

STEP 3

Get up to speed in two weeks or less

Timeblock one hour a day to master your new technology, to ensure you get all you can from the free offering. Take any classes and all classes available to help you get up to speed. Try to master a solution in two weeks, then move onto the next tool or platform.

Technology and Productivity

| Organize your contacts

As a real estate agent, you may have access to a host of technology products that your brokerage, association, or MLS is paying for.

STEP 1

Export, Export, Export

Export every contact list you have into .csv files, from your phone to your (many) email accounts, listservs, holiday card lists, contact lists for volunteer orgs, or other activities.

STEP 2

Create a spreadsheet

If you'll use a specific CRM, download their preferred contact template to fill in. If not, then create your own spreadsheet with rows for:

- | | | | |
|--------------|------------------|--------------------|-----------------------|
| • First name | • Street address | • Phone 1 | |
| • Last name | • City | • Phone 2 | • Wedding anniversary |
| • Email 1 | • State | • Birthday | • How you know them |
| • Email 2 | • Zip code | • Home anniversary | (lead source) |

STEP 3

Add all your contacts

Open each .csv and start merging contacts to your primary contact sheet. Do your best to fill in the blanks now while you have the time.

STEP 4

Put your data to work for you!


Upload your data to your CRM and follow prompts to add key contacts to email newsletters, birthday greeting texts, market update mailers, and more. Start with an email letting them know you are in the real estate business now!


Technology and Productivity


| Set up a buyer lead workflow


What will you do when a prospective buyer reaches out? Do you have a plan? By creating workflows, you can ensure that prospective clients don't slip through the cracks.


Workflow: From buyer lead to in-person appointment

 **Immediate:** Initiate contact, whether as a response to an incoming lead or after hearing through the grapevine that they are in the market to buy a home.


 **Same day:** Gauge their interest and timeline by asking follow-up questions about what they need help with, if they have been pre-qualified or pre-approved, and if they have anything driving their purchase.


 **Day 1:** Ask when they'd like to meet up in person to discuss their buying needs. If they haven't responded, send them some early-stage buyer materials (such as a blog about how to determine their buying power), or a list of properties they may be interested in.


 **Day 2-7:** Continue this gentle lead nurture process until you have a set appointment. Send additional articles or listings, plus your analysis and insights.

 **If no contact after 7 days:** Add them to your email marketing plans to ensure they receive future communications. Determine, based on their initial interest, how often to directly engage them from here.

Workflow: From buyer lead to buyer client

 **Meet them in person** to walk through their needs and how you can help them find the right property to call home.

 **Reach out daily** after the appointment, for five days, to ask if they need any more information before signing on with you.

 **After five days,** ask them if they'd like you to stay in touch or what next steps they wish to take.

 **If they agree, have them sign a buyer's agreement** that states your commission rate and the standards you will uphold as you work with them to buy a home.

“Mastery happens when you are committed to the breakthrough; the decision that enough is enough and you are no longer ‘interested’ in your success, you are COMMITTED to it!!”

– Tony Robbins



Superior Broker Support



Ground Level Financial Opportunities



Technology Support & Training



**Ready to Thrive in your
New Career?**

Discover How to Start
Earning Faster

Darren Woodard
Co-Founder

 **INNOVATE**
REAL ESTATE