

WEDNESDAYS

with

WAYNE



LIVE AGENT TRAINING

Past Client Systems...
The “Line in the Sand”
Begins in:

10:00
Stop

WEDNESDAYS

with

WAYNE



LIVE AGENT TRAINING

*“The Line in the Sand”:
Past Client Systems*

“Most people go through their whole life and never get leverage, and that’s sad...but what’s worse is when people have leverage and don’t use it.”

Colin Cowherd



The basic premise of today... You are HERE!
You have a BULLETPROOF
Leverage Point!!
Let's USE IT!

How are you doing?

What are the closed transaction numbers for your market? What % are they off?

What are your transaction numbers? Are you up from previous years? Even? Down? What %?

Are you out-performing the market...Way to go! Analyze and leverage the current activities

Are you even with the market...Way to go! Analyze and add another activity

But...If you are off more than the market, What have you stopped doing that you were doing? (get back to that!)

If you are doing exactly what you've always done, but you are off more than the marketplace...

WHAT YOU HAVE ALWAYS DONE ISN'T GOOD
ENOUGH ANYMORE!

You **MUST** upgrade!!!

While today's marketplace is challenging
"The Storm" hasn't hit yet

But it's been getting cloudy for a long time



RE/MAX[®]
House of Brokers
2005...And Beyond

- **We have been marginalized and re-positioned.**
- **We've lost our selling proposition to the public – INFORMATION.**
- **The public expects more today than ever before.**
- **Our “independence” has turned into a detriment.**
- **24-36 months from now, there will be 2 types of agents/companies:**

GREAT....and CHEAP!

- **The “tweeners” will have to make a choice.**
- **By the time “tweeners” realize this fact, it will be too late – they’ll have to go cheap.**
- **This creates a GREAT OPPORTUNITY for RE/MAX House of Brokers.**

Many agents say they are “waiting” for rates to drop or inventory to return

STOP WAITING!

This market requires you to think and act **STRATEGICALLY**, not wait for the market

Today's market forces will "thin the herd" as the ***VAST MAJORITY*** of agents are ill-equipped to deal with them

Consumer Behavior has changed,
and as a result...

“The Game” has changed...



I skate to where the puck is going to be, not where it has been”

-Wayne Gretzky

The Biggest Change in the last 5 years...

While real estate is local, what is driving consumer behavior is not

Absent a VIBRANT past client/SOI plan, consumers are now going online to find an agent!

The reality is, we are late to the “disruption dance”

It happened to other industries years ago:

TRAVEL AGENTS-Travelocity, Orbitz, Kayak

INSURANCE AGENTS-Geico, Progressive

LAWYERS-Legal Zoom

STOCK BROKERS-Charles Schwab, Etrade, Robinhood

BIG BOX RETAILERS-Amazon

3 “Rails”

Past Clients/SOI
Google-Listing Side
Zillow-Buyer Side

Do you have a strategy in these arenas?

Google the following for your market:

Real Estate Agents in _____

Do you know them?

Where/do you show up?

Online reviews now carry equal or greater weight than personal referrals

Consumers are “googling” before, (selection) and during (information)

Zillow had 255.5 million monthly visitors in 2022.

The total of all major brand real estate sites was 33.1 million per month...

12.9% of Zillow

Moving forward, the marketplace will belong to those agents who:

1. Have the ***capacity*** to have great conversations
2. Have the ***willingness*** to have those conversations
3. Have ***massive*** past client/client care systems

Remember:

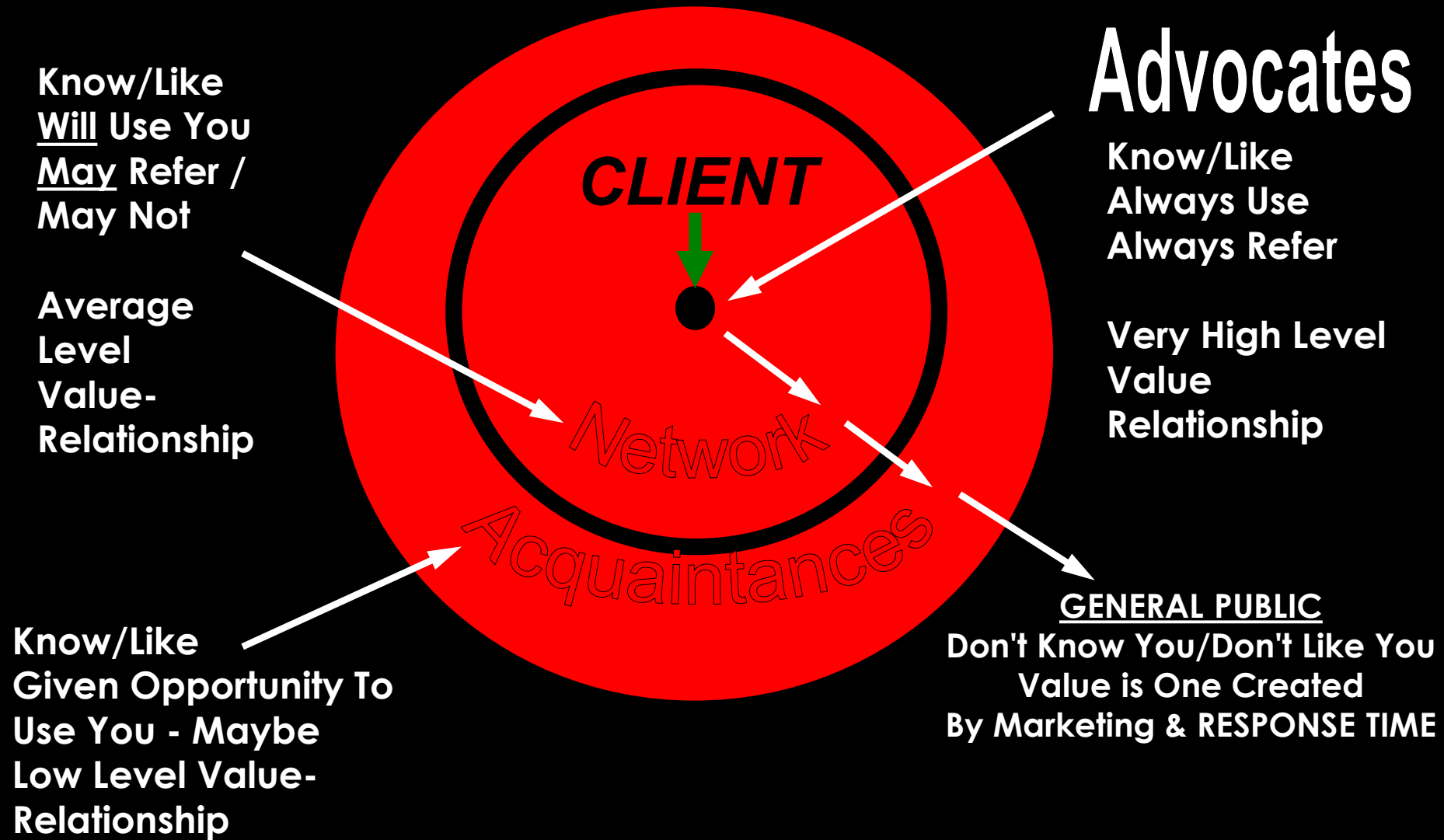
70% of Realtors do not last 18 months

87% of Realtors do not last 5 years

80% of Sellers talk to ONE agent before listing

39% of those conversations are a result of a referral or relationship with the agent

The "Business Bullseye"



Differentiation is KEY in today's market

Differentiation happens *before, during and after* the transaction

#1 Action Item: **EMBRACE A CRM**

Before The Transaction:

Opening Dialogue

Materials

- Video

- Pre-List Packet

- Pre-Buyer Packet

- Touchpoint

 - Starbucks? Mugs and small bag of coffee/tea?

Process

Follow-up (What is your protocol?)

During The Transaction: *Property*

Listing Presentation Dialogue

Buyer Presentation Dialogue

Expectation Dialogue

Communication Protocols

Staging/Pics/etc.

During The Transaction: *Personal*

Massage Certificate (stress)

Handyman

Lowe's/Home Depot GC

Weekly "check-in"

Starbucks GC

(for use when out of house during showings)

Chef (private dinner)

Every Personal Touch should be accompanied by a note explaining use, and thanking for opportunity to work with them

After the Transaction: *Personal*

Contact, Contact, Contact!!! 36X **Minimum!!!**

Contacts Must Be *Varied and Valuable*

Mail

E-Mail

Calls

Texts

Visits

Anniversary Dinner (Chef)

Client Parties (4X) TEAMIFY HERE!!!!!!!!!!!!



How Often Should you Focus on Client Systems?

DAILY

2 ISSUES

Database Size (Smaller)
More Vibrant Engagement

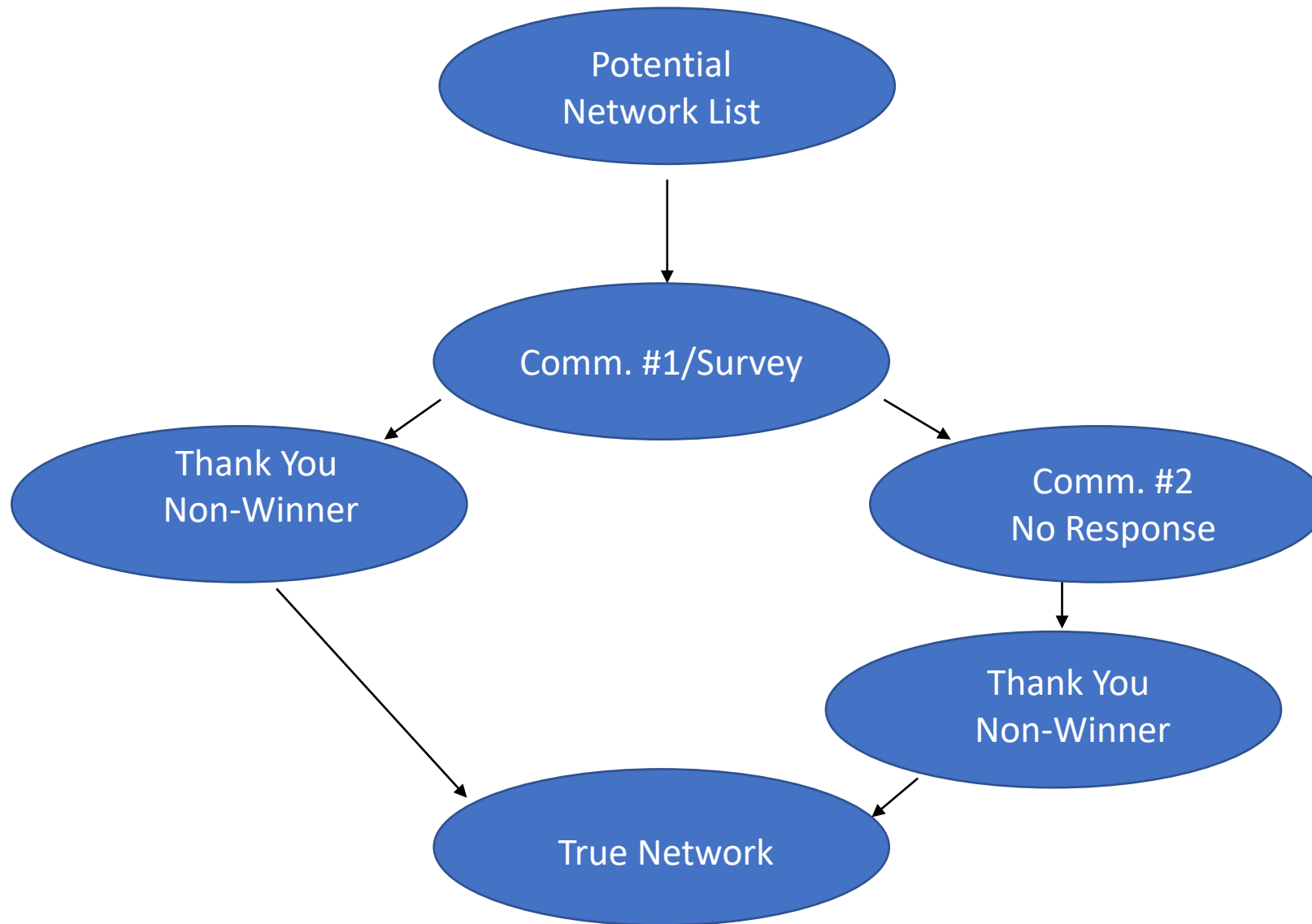
Model:

in SOI

X 5

X 5%

Projected SOI Transactions



It is always my goal to provide my friends with the best service and support possible. To do this, we have recently upgraded our computer software. Attached is a form to update and expand the information we currently have in my database.

Please take a few minutes at your earliest convenience to complete this form and return it to me. To show my appreciation for the time you take in completing this form, we will enter all those returned into a drawing for a \$100 gift certificate from INSERT RESTAURANT NAME .

Don't wait too long to respond. I will be drawing the names on October 15!

At the end of the form, we have included a section for you to add any business you own, or with which you are associated, that you would like to have promoted. We often meet people who are new to the community that may require a service or product you offer. It would be my pleasure to be able to help your business in that way.

By the way, if you know of someone needing to buy or sell a property, please give me a call at (Insert telephone #).

Thank you in advance for your consideration.

CLIENT SURVEY

NAME: _____ NAME: _____
 BIRTHDAY: _____ BIRTHDAY: _____
 ANNIVERSARY: _____

MAILING ADDRESS: _____

PHONE NUMBERS
 HOME: _____ OFFICE: _____
 MOBILE: _____ DIRECT: _____

EMAIL ADDRESS: _____
 Facebook: YES or NO If yes: _____
 LinkedIn: YES or NO If yes: _____
 Instagram: YES or NO If yes: _____

CHILDREN LIVING AT HOME:
 NAME: _____ AGE: _____ BIRTHDAY: _____
 NAME: _____ AGE: _____ BIRTHDAY: _____
 NAME: _____ AGE: _____ BIRTHDAY: _____
 NAME: _____ AGE: _____ BIRTHDAY: _____

PETS: _____
 HOBBIES: _____

BUSINESS THAT YOU WOULD LIKE PROMOTED:
 NAME: _____ PHONE: _____
 ADDRESS: _____
 BUSINESS TYPE: _____

This Client survey should be a part of every packet/booklet for new clients!!!

Thank you so much for responding to my survey and sending in the information. The winner of the \$50 gift certificates were: _____ .

Please tell them congratulations, when you see them.

I'm sorry that you weren't a winner, but thank you again for your response, and I'll be in touch!

Best

The offer for the gift certificates is still on the table and your odds of winning have improved. I have already given away A \$50 certificate to those who responded .

The winners were _____ . Congratulations!

Please take a few minutes to complete the survey.

Please remember to include any businesses that you would like us to promote to people who are new to the area. Now it's your chance.

Another lucky person will be receiving a \$50 gift certificate to _____. Send in your information today!

Best,

Easiest Business Model of All:

Be Good

Be Nice

Stay in Touch

We “Get It” Intellectually
But Not Behaviorally

CASE STUDY
RE/MAX Energy Yukon, OK
(OKC)

PAST CLIENT/SOI MODEL: 36 Touches per Year

**# in Network _____ X 5 X 5% = Target # of
Closed Transactions**

2-year increase in business from referral (8 agents for entire time)

2020-2021: 60.8% 107-172

2021-2022: 15.7% 172-199

2022

Network Size: 975×5 (4875) $\times 5\% = 243$ Proj. Trans.

**Total Closed from SOI: 230
(94.7% efficiency)**

**Top Agent: 137% efficiency
(41 transactions from SOI of 120)**

2022 vs. 2023 Jan-July

2022:

Total Closed:

219

Closed from Referral:

140 (64%)

2023:

Total Closed:

213 (-2.8%)

Closed from Referral:

143 (67%)

OKC Market:

-14.6%

DRIVERS:

4 Client Events

Video Announcement sent to all in Network (Touch #1)

Phone Call Follow-up (Touch #2)

E-Vite (Touch #3)

Postcard Invite (Touch #4)

EVENT (Touch #5)

Thanks for Coming Video sent to all (Touch #6)

Monthly Postcard Campaign (12 Touches)

4 Events X 6 Touches...24

Monthly Mailer.....12

Total Touches.....36

ACTION ITEMS

Subscribe to:
Keeping Current Matters...
www.keepingcurrentmatters.com

Create a closed Facebook Group for your
past clients and referral sources

Up your annual SOI Contacts to 36X

Need to Grow your Database?

Leverage FACEBOOK!

How many FB friends do you have?

Identify the FB friends you have that are not already in your SOI, but you feel could be referral sources

“Hi _____, I was wondering if you have a Realtor you would use or refer business to. If not, would you consider using me?”

IF THEY ANSWER IN THE AFFIRMATIVE, THEN SEND THIS:

“Great! Could you send me your email address and home address? I have some great events coming up this year for my clients and want to make sure you get invited as well!”

IF THEY GIVE YOU THE INFORMATION, THEY HAVE NOW
RAISED THEIR HAND TWICE!

ENROLL THEM IN YOUR PROCESS!

The goal is to become the “hub of the wheel” for all real estate
information!



LERMA'S CLIQUE

Exclusive client based community

referrals - hookups - discounts
contests - giveaways - service

Ryan Lerma - 405-246-8517

Lerma's Clique



+ Invite



Discussion

Featured

Members

Media

Files

Reels



Like

Comment

Most Relevant ▾



Ryan Lerma

Admin

Group expert

+1

December 31, 2022 at 5:17 PM · 🌐



Join me in welcoming our newest members Wes & Meredith DeWitte to the Clique! Read the constitution at the top. Post and chime in any time!

I recently helped Wes & Meredith purchase a new construction home with RT Quality Homes in the Blanchard/Bridge Creek area. They have 2 daughters and a new puppy!! Wes is an audio engineer in the music and television business(you've probably heard or seen his work!) and Meredith works in healthcare as a nurse practitioner!



5

2 comments Seen by 66

Like

Comment

Send

Most recent ▾



Write a comment...



Carol Condit
Welcome



Like Reply 3d



Dana Magirowsky McAllister
Welcome!



Hidden

Only members can

May include flags

Admins may allow group even if they more

Rooms



Get the gro

Create a room to



Cody Bruce

November 22, 2022 · 🌐

Anyone have recommendations for someone to help with Christmas light hanging? I'm getting a start on it myself but another set of hands and an extension ladder will probably save me from an untimely death.

👍 Ryan Lerma

3 comments · Seen by 56



Like



Comment



Send

Most recent ▾



Write an answer...



Lisa Hodges

👍 Chris Compton is awesome

Like Reply 6w



Chris Bozeman

👍 Jose Hernandez Jr. is my guy.

Like Reply 6w



Ryan Lerma Admin Group expert +1

Michael Sickler May be able to help you. He's pretty good at it! Also 👍 Nick Lawson with Lawson Landscape May be able to help you out! His number is (405) 209-0419 Tellem I sentcha!

Like Reply 6w Edited

Write a comment

🔒 Hidden

Only members can find this group

🛡️ May include flagged content

Admins may allow some posts and replies in this group even if they're flagged by our AI. [Learn more](#)

[Learn more](#)

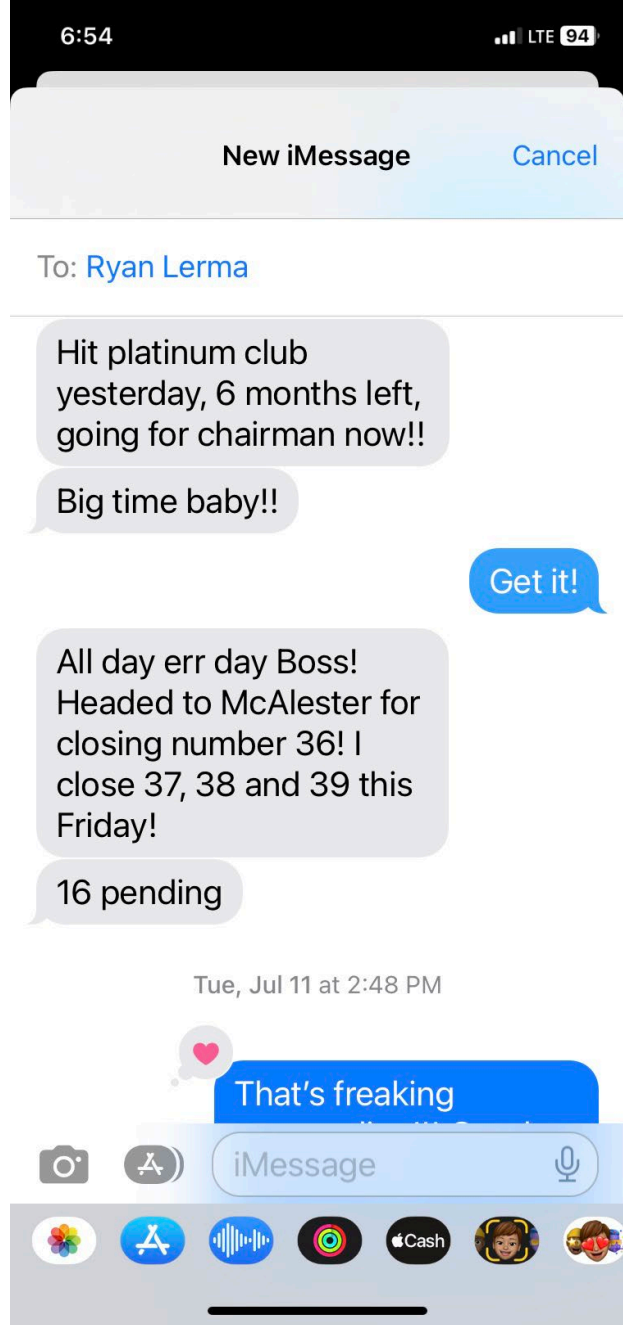
Rooms



Get the group together

Create a room to instantly connect with your group members. Includes video chat and more.

[Create room](#)



**100%
repeat
and
referral!**



CLARK'S CREW

EXCLUSIVE CLIENT BASED COMMUNITY

REFERRALS | DISCOUNTS | GIVEAWAYS | CONTESTS | SERVICE

TYLER CLARK | 405.588.7546

RE/MAX
ENERGY REAL ESTATE




Clark's Crew



[+ Invite](#) ▼

- [Discussion](#)
- [Featured](#)
- [Rooms](#)
- [Members](#)
- [Events](#)
- [Media](#)
- [Files](#)





About

This group is set up exclusively for past & present real estate clients

The Isa Connection
Private group · 213 members

Joined ▾

Community home

Rooms

Events

Open Skate Night
Click to join



The Isa Connection



+ Invite ▾

Discussion Members Media Files

Search and More icons

Write something...

Photo/video Poll

Most Relevant ▾

Tony Isa ...

About

This is a group for Tony's past and future clients to experience some giveaways and have fun!

Private
Only members can see who's in the group and what they post.

Hidden
Only members can find this group.

- Home
- Profile
- Community home
- Rooms
- Events
- Open Skate Night
Click to join

The Isa Connection
Private group · 213 members

Joined ▾

The Isa Connection

+ Invite



View more comments



Tony Isa

Admin

· March 13 · 🌐



Monday Giveaway!

Comment your favorite Starbucks drink below to be enter to win a \$10 gift card. 5 winners will be chosen tomorrow!



23 comments · Seen by 133

Like

Comment

Send

About

This is a group for Tony's past and future clients to experience some giveaways and have fun!

Private

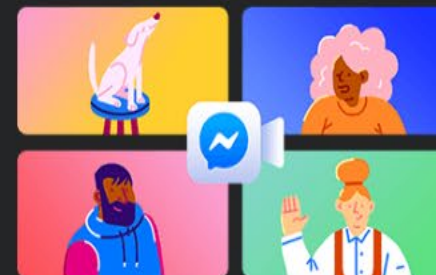
Only members can see who's in the group and what they post.

Hidden

Only members can find this group.

Learn more

Rooms



Get the group together on video chat

Create a room to instantly connect to other members on video chat.

Create room

Chats



Open Skate Night

Join to chat

Join

- Home
- Profile
- Video
- Marketplace
- Rooms
- Events
- Open Skate Night**
Click to join
- Community
- Groups
- Link

The Isa Connection
Private group · 213 members

Joined ▾ ⋮

Community home

Rooms

Events

Open Skate Night
Click to join

The Isa Connection

Like Reply 9w

[View more comments](#)

Tony Isa is 😊 feeling happy with **Desi Isa** and **8 others**.
[Admin](#) · March 10 · 🌐

Hey everyone! We had so much fun at last night's event! Here are some pictures for those who missed it! 😊

Also if you lost your coat there is one at the rink still.



Get the group together on video chat

Create a room to instantly connect to other members on video chat.

[Create room](#)

Chats

Open Skate Night
Join to chat Join

[See all](#)

Recent media



Final Thought:

Disruption **ALWAYS** Creates Opportunity!



*See you October 4th
For
Presenting your Value to a
Buyer Client*

Thank You!

For more information please visit
waynefredrick.com

Contact us directly
Admin@stfconsult.com
Wayne@stfconsult.com
417-838-9944

