



Nobody Knows Homes BetterSM

BHGRE COMMUNITY'S

NEW AGENT HANDBOOK

2025



PASSION

AUTHENTICITY

INCLUSION

GROWTH

EXCELLENCE

To stimulate energy to a higher level of inspiration and emotion.

Being exactly what we claim to be.

To embrace all people and ideas.

To have increasing influence.

To consistently exceed expectations.



OUR CORE BUSINESS VALUES

It is important for a brand to have at its foundation a set of core values. This helps ensure the brand remains on the right course for growth, including aligning with the right companies which also share its values. It enables the brand to prioritize effectively and hit and exceed goals. Most importantly, it serves as a blueprint for its service philosophies and practices. Better Homes and Gardens Real Estate's core values are PAIGE: passion, authenticity, inclusion, growth and excellence.

INTRODUCTION

Welcome to Better Homes and Gardens Real Estate Community Realty!

We have designed this New Agent Handbook to help you better acclimate to our office and to help you to take advantage of all of our wonderful tools and systems right away! The handbook covers the following:

- A listing of all training available for the new programs and services
- Suggestions to leverage the brand, including scripts and dialogues for active clients, sphere, inactive clients, and others
- Instructions on how to make a smooth transition: how to change over your email for your smart phone, update your voicemail, update your email signatures, and update your social networking profiles
- A list of Frequently Asked Questions about the transition

If you have any questions, or need help at any point during your transition, please reach out to one of us! Thank you for your support and we are so happy to have you call our office home.

Contact Us:

bhgrecommunity@gmail.com Nikki Myers, Office Manager

jenniferdaywaltrealtor@gmail.com Jennifer Daywalt, Broker of Record/Owner

Office Number: 610.933.1919
508 Bridge St
Phoenixville, PA 14960

My Promise to You

Five Reasons Why It's Better at Better Home and Gardens Real Estate

I believe we are the right brokerage for you, for our clients, and for our community.

Here's Why:

- 1. The Power of the Better Homes and Gardens Brand:** Our brand is focused on the consumer and in doing so, our company and brand are relevant 365 days a year. This is truly not just a real estate brand, but a LIFESTYLE brand. We have the ability to touch the consumer every day of the year, not just when they are ready to buy or sell. Being that familiar face and trusted provider will translate into more business for our team.
- 2. The Greenhouse:** It's the best tool kit in the industry. It combines your Educational Tools, Marketing Tools, Presentation Tools, Approved Suppliers, Website Creation, CRM, and more into one place that allows you to do everything you need to from one website, all wrapped up with 24/7 support from the BHGRE brand.
- 3. Training, Education, & Support:** We can all get better at what we do. Training is available to all BHGRE members in a variety of forms—live, webinars, self-directed, and on a variety of topics. Want to learn about the tools in Greenhouse? We can help. Want to get better at marketing? We can help with that. Need a fresh outlook on your sales approach? We can help. Need a quick refresher on something? It's all at your fingertips, at a time that works best for you, and all backed by a broker with 20 years of experience who is available to help you when *you* need it.
- 4. Agent Empowerment:** Our culture and management philosophy at Better Home and Gardens Community Realty is helping you become the best that you can be, by giving you the tools to learn everything that you can learn. We have the hands-on experience, mentoring, guidance, and coaching that will help you to excel at being an agent.
- 5. Enthusiastic Leadership:** You'll meet the leadership of Better Homes and Gardens Community Realty: A group of enthusiastic real estate people backed by a brand that is determined to constantly create a new and better real estate brand. and who are going to support your growth the whole way.



Reference Sheet and Assignments

Item	Information
Jennifer's Real Estate License Number	RM423694
Office Real Estate License Number	RB068113
NRDS Number	720507034
Office Wifi Name	FiOs-1QJC7
Office Wifi Password	rug7135rustle72yes
Office Lockbox Combo	1969

Dues	Fees
Tri-County Suburban Realtors Dues	\$574
E&O Insurance	\$450 due July 1st
License Renewel Fee	\$96 for Real Estate Sales Person Every Even Year
BrightMLS Fees	\$250 OTF + \$120 per Quarter
DocuSign & Zipforms	Free through Tri County Suburban Realtors
SUPRA Electronic Key Cost	OTF \$50 Basic:\$12.92 per month OR Pro:\$21.57 per month

Reference Sheet and Assignments (cont.)

General Assignments:

- Update your email to reflect BHGRE signature
- Update your social media accounts to reflect to BHGRE
- Update your voicemail to reflect BHGRE
- Accept friend request from Jennifer Daywalt on Facebook
 - Take a look at our client facing office Facebook
 - Take a look at our private office page- this is great for speaking with agents, looking for coverage, finding signs, and sharing important information as well as seeing what events are going on
- Create a Facebook Business Page (Or reflect your BHGRE move on your old one!)
- Order New Business Cards
- Order Sign Riders- signs are available to borrow from our stock, however we always recommend you have a rider that will allow you to add your cell phone number as contact information! We use DeeSigns.
- Create A Google My Business Page- speak with Nikki if you plan on using our office address as you will need a postcard that is going to come to our office address to set things up
- Take a look at MoxiWebsites and get started designing your very own business website

Everywhere Corporation

Everywhere Corporation, a global provider of real estate services, has a diversified business model that includes real estate franchising, brokerage, relocation, and title services.

Everywhere's world-renowned brands and business units include Better Homes and Gardens Real Estate, CENTURY 21, Coldwell Banker, Coldwell Banker Commercial, The Corcoran Group, ERA, Sotheby's International Realty, NRT LLC, Cartus, and Title Resource Group. Collectively, Everywhere's franchise systems have approximately 15,000 offices and 315,000 sales associates doing business in 87 countries around the world. Approximately one in four U.S. homes bought or sold in a brokerage-related transaction involved an Everywhere brand-affiliated brokerage.

Better Homes and Gardens Real Estate

The Better Homes and Gardens name, owned by Meredith Corporation, has been a staple in American life ever since first published in 1922. The brand represents a true passion for the home with a deep commitment to homeownership that builds quality of life for individuals, families, and communities. Better Homes and Gardens Real Estate delivers a full-service value proposition that engages the best technologies to meet the needs of homebuyers and sellers of every generation. Today, the magazine boasts a circulation of 7.6 million, a readership of nearly 40 million and holds the largest database in the U.S. with 80 million consumers. The brand includes over 60 brokerages with over 300 offices in the US and Canada and over 10,000 agents and continues to expand at a rapid pace. The key differentiators of the Better Homes and Gardens Real Estate brand include:

- A unique team of industry experts available to support your business
- Access to one of the largest consumer databases in the world (the Meredith Consumer database)
- The latest online principals used to engage the online consumer
- Best in class systems and tools to help develop and manage your business
- Follow-up programs utilizing extensive Better Homes and Gardens' resources
- Online generation and management systems

HOW TO LEVERAGE THE BHGRE BRAND

A great way to jumpstart your business is to use this transition to Better Homes and Gardens Real Estate as a reason to get in touch with everyone you know. This is a great opportunity for you to reconnect with your clients, your sphere, and your inactive clients to see if you can generate some direct business and referrals.

1. Call your active sellers and buyers
2. Call your inactive leads.
3. Email your entire database a Digital Marketing Center item such as an eCard.
4. Send out a direct mail postcard from the Print Marketing Center or PinPoint.
5. Log into the Greenhouse and navigate to the “Marketing” tab, then select “Online” and “Social” to review and then follow the brand social media sites.

CONTACT THE BHGRE CORPORATION TEAM FOR TECHNICAL SUPPORT:

- Phone at 866.616.4BHG
- Live Chat from the Live Chat Link on Greenhouse
- Email at help@bhgrealestate.com

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SUGGESTED SCRIPTS AND DIALOUES

Seller Clients

Hi, _____, this is [Name]. The reason I'm calling is to let you know that I am now with Better Homes and Gardens Real Estate, which gives me a lot of great new tools to help sellers like you. You've heard of Better Homes and Gardesn, right? Terrific!

I wanted to give you the heads up that you will probably see someone coming by in the next 24 hours to change your yard sign. Also, our company website will feature your property on www.BHGCommunity.com and I will be sending you a link to my personal website. Do you have any questions? Great!

Buyer Clients

Hi, _____, this is [Name]. The reason I'm calling is to let you know that I am now an Agent with Better Homes and Gardens Real Estate, which gives me a lot of great new tools to help buyers like you. You've heard of Better Homes and Gardens, right? Terrific!

I wanted to give you the heads up that you'll start seeing a lot of Better Homes and Gardens Real Estate signs go up in the area. Our website, www.BHGCommunity.com and I will be sending you over a link to my personal website.

Everything else is the same. You're still getting the same services from our company, and you're still getting the same personal service from me. Do you have any questions? Great!

Sphere of Influence (SOI) - Family, Friends, Past Clients, etc...

Hi, _____, this is [Name]. Do you have a moment for a business call? Great! The reason I'm calling is to let you know that I've just affiliated with Better Homes and Gardens Real Estate. This gives me a lot of great new tools to help buyers and sellers. You've heard of Better Homes and Gardens, right? Terrific!

I'm very excited about the change, which gives me an opportunity to change the way people think about real estate. I want to be a different kind of real estate agent, providing services to people even when they're not actively buying or selling real estate. If you want to see our website, it's www.BHGCommunity.com and I'll be sending you a link to my personal site.

While I have you on the phone, do you need anything from me? Remember that I'm never too busy for you, and if you ever have any real estate questions, feel free to give me a call. By the way, do you know anyone who might need my services, anyone in your family, neighbors, anyone from work? No? Great! Well, if you ever know anyone who needs my help, just let me know!

Inactive Leads

Hi, _____, this is [Name] from _____. Do you have a moment for a business call? Great! The reason I'm calling is to let you know that I am now an agent with Better Homes and Gardens Real Estate Community Realty. This gives me a lot of great new tools to help buyers and sellers. You've heard of Better Homes and Gardens, right? Terrific!

If you want to see our website, it's www.BHGCommunity.com. I can send you my personal website link. If you want to email me, my email address is still the same. I also wanted to call you because we talked a few months ago about what was happening in the market. [Current Local Stats]. There's a lot happening in the market, so I wanted to check to see if you had any questions. What are you thinking at this point?

Emails - Clients

I wanted to write to let you know that I am now an Agent with Better Homes and Gardens Real Estate. This move gives me a lot of great new tools to help buyers and sellers.

I'm very excited about the change, which gives me an opportunity to change the way people think about real estate. I want to be a different kind of real estate agent, providing services to people even when they're not actively buying or selling real estate. If you want to see our website, it's www.BHGCommunity.com. And if you want to email me, my email address is still the same. I will be calling you soon to discuss this, but I wanted to make sure you could find me.

Everything else is the same. Better Homes and Gardens Real Estate Community Realty is the brokerage of choice for our area, and we still provide the best online and personal services available in the industry. If you have any questions, let me know.

Letters- Clients

I wanted to write to thank you for giving me the opportunity to work with you, and to let you know how much I value the trust you have placed in me to represent you for your real estate needs. I also am delighted to inform you that I have now become part of Better Homes and Gardens Real Estate family, which is one of the legendary franchise systems in the industry. I believe that Better Homes and Gardens Real Estate is the future of this industry, and I am so excited to be a part of it.

I feel that my new affiliation with Better Homes and Gardens Real Estate is perfectly aligned with my goals and values to keep me in touch with today, while keeping an eye on the future and always working to be the most valuable asset to my clients.

Moreover, I am still the same. I will still be acting as your agent, with the same resources and tools that I have always had. I will now, though, have access to a whole new palette of programs that will help me service your real estate needs. I am very excited about these new opportunities, and I look forward to discussing it with you.

My phone number and email are still the same, and I will be sending you a link to my new personal website. Thank you again for giving me the opportunity to work with you.

HOW TO GUIDE FOR BHGRE AGENTS

We have created this “How To” Guide to help you with all the little things that have to be done to help you maintain a smooth transition. In this section, we cover:

- How to update your voicemail
- How to update your email signature
- How to update your personal webpage
- How to update your social networking profiles
- How to update your personal marketing
- How to update your new profile displaying on bhgrealestate.com
- How to order new print marketing materials
- How to order BHG magazine subscriptions or other BHG related gifts for clients
- How to access Approved Supplier discounts
- How to market luxury homes
- How to find images to include in my new marketing materials
- How to get help with Better Homes and Gardens Real Estate Tools

How to Update Your Voicemail

Remember to update your voicemail greeting. Every phone is different, but if you call into your voicemail you should be prompted to go to “Message Options” or “Record Your Voicemail.” Once you’ve gotten to the point of recording your voicemail, you should record it in a quiet place, without using a headset, but instead speaking directly into the phone for ideal transmission. Here is the suggested message:

Hi this is _____ with Better Homes and Gardens Community Realty. I’m sorry I can’t take your call right now but your call is important to me. Please leave a message and I will contact you as soon as possible. Thank you and have a great day!

How to Update Your Email Signature

A lot of you use an email signature for your outgoing emails; and those of you who are not should probably do so. It's a great way to brand your outgoing email. There are many different email programs, but if you just go to the "Help" section on your email program and search for "signature" you will probably find instructions for doing so.

You can change the font, color, weight, and more using the text formatting tools. A signature should be easy to read and professional. A distracting signature will make you look less professional to the recipient. If you still need assistance, please contact your Office Manager. An idea is to use green and gray to highlight your name and phone number etc. Here are the step by step instructions for Gmail:

1. Click the settings gear button and select "Settings" from the drop-down menu.
2. Stay on the "General" tab, scroll down to the "Signature" section and select the option below "No signature" to turn the feature on.
3. You'll have a text box to write out your signature, so write it out.

[Name]

Realtor

Better Homes and Gardens Real Estate Community Realty

508 Bridge St

Phoenixville, PA 19460

XXX.XXX.XXX (mobile)

610.933.1919 (office)

www.BHGCommunity.com

If you wish to add a quote, a marketing line, or the company logo, you can do that. You'll always have the option of editing your signature on a particular outgoing message. You'll need to set up the signature to go out automatically in your emails.

How to Update Your Personal Webpage

If you currently have a personal website, at minimum, we ask that you update the company logo and any reference to the old company name. We would prefer that if you can revise some of the background color to the site, you do so as well and convert to green (Hex #669933). We also suggest you access The Greenhouse as soon as possible and create your accounts within Greenhouse to begin using the Digital Marketing Center.

How to Update Your Social Networking Profiles

If you're on social networking sites, you'll want to update your online profiles. It's simple to do so from the desktop. We will provide new, branded, personalized banners for you upon request.

Facebook:

1. Log into Facebook.com.
2. Click on the "Profile" link at the top.
3. Click on "Update Info" under your cover photo.
4. You can now edit the Work and Education sections.
5. Edit the information that refers to the old company name in the "Work and Education" sections.
6. Edit your login email information under "Contact Information".
7. While you're on Facebook stay up-to-date on current industry news and brand events by searching for "All Things Real Estate BHGRE" and "Like" us!

LinkedIn:

1. Log into linkedin.com
2. Click on the "Profile" link at the top.
3. Click "Edit Profile"
4. Click on the "Pencil icon" next to the relevant position.
5. Edit the information that refers to the old company name. You don't need to "add current position", because you're not changing positions.
6. To be in the know, join Better Homes and Gardens Real Estate LinkedIn Group!

Other:

Follow BHGRE on all social media platforms you utilize.

- www.Facebook.com/bhgrealestate
- www.Twitter.com/bhgrealestate
- www.Youtube.com/bhgrealestate
- www.Pinterest.com/bhgrealestate
- www/Instagram.com/bhgrealestate

How to Update Your Marketing Pieces with New Branding

If you are working with a vendor for your personal marketing pieces, you will need to contact your vendor and let them know that you have a new company name, with new contact information. If you have print ads that are currently running in local magazines or newspapers, then let them run. But, if you have time to edit the marketing before it is released, we have new logos and other artwork to use in your personal ads. Better Homes and Gardens also offers both a Digital Marketing Center and a Print Marketing Center through Greenhouse. These are populated with our new company logo allowing you to create postcards, listing brochures, virtual tools, eCard, eNewsletter, and much more starting today! Also available in the Marketing section of Greenhouse is the brand's ID and Resource Guide where you can find brand print ad templates, logos, and royalty-free photo library.

How to Order New Print Marketing Materials

The Better Homes and Gardens Real Estate Print Marketing Center provides access to various branded postcards, brochures, presentation folders, stationery items, and closing gifts. Once you receive your Greenhouse credentials, log into Greenhouse and click on the "Print Marketing Center" link in the Marketing tab. Also available in this section of Greenhouse is PinPoint, a tool that allows agents to access the Meredith database, select demographic criteria, and then mail customized postcards to members of the database. This is an exclusive tool only available to Better Homes and Gardens Real Estate agents. The Digital Marketing Center also allows you to edit and print flyers and more.

How to Create New Digital Marketing Materials

The Better Homes and Gardens Real Estate Digital Marketing Center provides access to hundreds of electronic marketing items you can customize and email to current, past, and future buyers and sellers. The creation and hosting of these items are free of charge and are integrated into your BHGRE CRM. Once you receive your Greenhouse credentials, click on Marketing in the Greenhouse and then Digital Marketing to create a marketing piece from scratch. Or, if you are creating a listing-specific flyer or ePostcard, you can search for the MLS# and photos and additional listing details with pre-populate on the templates.

Ordering BHG Magazine Subscription or Other BHG-Related Gifts

For just over \$1 a month, you can purchase a one-year (12 issue) subscription to the Better Homes and Gardens magazine or a one-year (8 issue) subscription to Traditional Home magazine for your clients. The Personalized BHG Magazine Closing Gift Program includes a personalized label on the cover of each magazine with your contact information, headshot, company logo, and personal message. To order, subscriptions, once you have access to Greenhouse, log into Greenhouse and go to the “Shopping” section and then click on the Better Homes and Gardens’ products section then select Personalized BHG Magazine Gift Subscription. You will also find other valuable discounts on BHG books like the well-known BHG Cookbook or discounts through BHG’s signature flower series offered by FTD.com.

How to Access Approved Supplier Discounts

Better Homes and Gardens offer various discounts on products and services through the Approved Supplier Program. These discounts include services such as moving services for clients to discounts on agent wireless plans through companies such as AT&T and Sprint! To access these discounts, once you have access to the Greenhouse, log into Greenhouse and navigate to the “Shopping”. Each Approved Supplier is listings in the sections such as marketing tools, closing gifts, and client discounts.

How to Market Luxury Homes

Distinctive Collection is the Better Homes and Gardens Real Estate luxury tier. In Greenhouse, under brand tiers, you can select Distinctive Collection, where you will be prompted to enter the five-digit zip code to see what price point qualifies for distinctive marketing. Distinctive Collection yard signs are available, as well as a line of postcards, brochures, and stationary in the Print Marketing Center, in addition to Distinctive Collection templates in the Digital Marketing Center.

Distinctive Collection listings are also marketed on BHGREcollection.com. In order to ensure your Distinctive Collection listings are displaying on the site they will need to be marked as Distinctive Collection listings. Your broker has elected to have your office manager to mark listings as distinctive on your behalf. If you have a listing coming up as distinctive, please reach out to your office manager.

Marketing Programs for Unique Listings Types

Better Homes and Gardens Real Estate offers additional “tiers” allowing you to ensure signs—as well as print and digital marketing materials—fit your marketing and listings. If our standard marketing just doesn’t cut it for your listing, we offer Urban Properties, Waterfront Collection, and Ranch and Resort Tiers and marketing programs. Unique signs have been developed by our Approved Suppliers as well as unique marketing materials that are available in both the Digital and Print Marketing Centers in Greenhouse. For more information on these branded tiers, please go to “Marketing” in Greenhouse and click on the “Brand Tiers” section.

How to Find Images to Include in My New Marketing Materials

Better Homes and Gardens Real Estate offers a variety of royalty free photos which can be used for any and all marketing purposes. These photos can be downloaded in formats for both print and online and can be found by navigation to the Marketing section of Greenhouse, and then the Brand ID and Resource Guide. Under “Download Assets” you can access our Photo Library.

FREQUENTLY ASKED QUESTIONS (FAQ)

Q: What is our company website?

A: www.BHGCommunity.com. We also encourage you to become familiar with www.BHGREHome.com. The site offers automated property tours for all of our listings, and more.

Q: Do we have BHGRE Community social media?

A: We sure do! Please add Jennifer Daywalt as a friend on Facebook, and we'll add you to our closed Better Homes and Gardens Community Realty Agents Group. We also are represented on Instagram as BHGCommunity.

Q: What about BHGRE Social Media?

A: There are a bunch of great resources that BHGRE has available for us to use through their social media channels, so borrow, share, and like away!

- www.Facebook.com/bhgrealestate
- www.X.com/bhgrealestate
- www.Youtube.com/bhgrealestate
- www.Pinterest.com/bhgrealestate
- www.Instagram.com/bhgrealestate

Q: Where can I get business cards?

A: There are several different types of business cards available and orderable from “The Print Marketing Center” in the BHGRE Greenhouse or you may visit our Vistaprint.

Q: Where can I get signage?

A: Jenn highly recommends DeeSigns for your sign ordering needs. You may order here:

<https://www.deesign.com/real%2Destate%2Dsigns/better%2Dhomes%2Dand%2Dgardens/>

Q: Is there a listing presentation incorporating Better Homes and Gardens branding and tools?

A: Absolutely! Check out the tab called “Office Documents,” and you’ll see both a listing and buyer presentation with our office information filled in and editable so that you can add your own information as well.

Q: What can I do to increase my online visibility?

A: Zillow, Trulia, and Realtor.com offer FREE profiles for agents. Google My Business is also becoming huge in the Real Estate world, as Zillow and Realtor.com start to focus on paid programs. We highly recommend all reviews you gather stay on Google My Business, since it's an up-to-date platform that is easy to work with and remains free for the moment. We also recommend starting a Facebook business page. Name it "Firstname Lastname - [Realtor]/[Real Estate Agent]/[Better Homes and Gardens Real Estate]. Complete your Moxiworks Website so that others may find you online.

Q: Who is Everywhere Corporation?

A: **Everywhere** Corporation, a global provider of real estate services, has a diversified business model that includes real estate franchising, brokerage, relocation, and title services. Everywhere's world-renowned brands and business units include Better Homes and Gardens Real Estate, CENTURY 21, Coldwell Banker, Coldwell Banker Commercial, The Corcoran Group, ERA, Sotheby's International Realty, NRT LLC, Cartus, and Title Resource Group. Collectively, Everywhere's franchise systems have approximately 15,000 offices and 315,000 sales associates doing business in 87 countries around the world. Approximately one in four U.S. homes bought or sold in a brokerage-related transaction involves an Everywhere brand-affiliated brokerage.

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7 TIPS FOR MASTERING THE SKILL OF SPENDING MONEY IN REAL ESTATE: DON'T RUN YOUR BUSINESS BLIND

Grant Findlay-Shirras

CEO of ParkBench.com and the Local Lender Real Estate Marketing System

KEY TAKEAWAYS:

- Audit your spending and be conservative in your financial planning to prevent unexpected losses.
- When you master the skill of spending money, it's so much fun. And making money on your purchases—well that puts you on the breakout-the-champagne level. Not to mention, you will create the business and lifestyle of your dreams.
- If you're a veteran who's failing to increase revenue and profit at a pace you'd like, it's time to audit yourself, be objective and open-minded, and think about taking these best practices to heart, and eventually, to the bank!
- When it comes to managing a business, and increasing revenue and profit, my track record is four for four companies. Here are my philosophies and best practices for budgeting, forecasting, and decision making:
- Audit your time, know your capacity, and look for efficiencies

HERE IS WHAT YOU NEED TO KNOW:

- Which activities in your life are a need to do vs. a nice to do
- How much time do you spend on every need-to-do activity in your life
- How much time you should spend prospecting, marketing, and serving clients
- How much time you spend, on average, with a buyer
- How much time you spend, on average, with a seller
- How long it takes to drive to most areas in your target market

If you don't know these answers, then you're driving your business blind! Figure these numbers out ASAP because then you know your capacity as a professional. As a result, when decisions come to you where you might invest your time and/or money, you're able to make smarter decisions. You won't commit to something if you don't have the time to execute it. Many Realtors say: "I have said yes to too many obligations that really don't move the need forward in my business and life." Furthermore, when you audit your time, you will be able to see opportunities to increase efficiencies.

Perhaps you'll realize that your travel time budget is a massive hindrance to your capacity as a professional, which will motivate you to invest in products and services that allow you to build your business closer to home. Maybe you'll see you're spending too much time on social media or administrative work, and investing in an assistant or some piece of software will be totally worth it. That, in turn, increases your capacity to prospect and serve clients, which you're better at, a move that could result in boosted revenue.

Be conservative in your planning. Here are the metrics you should be conservative about:

- How many sales will be in your target market. First, look at the sales in the last 12 months, then at what's projected, and take the lower number for your sales forecasting.
- Your close ratio. Think about all the meetings you've had with buyers and sellers, and figure out how many clients you won versus lost to the competition. This doesn't mean the deal closed; just closed the client. Determine this number, then round down because competition is increasing, and competition affects your close ratio.
- Total sellable houses = your market. Look to your MLS, USPS, or government census to see how many households there are in your market. Then, remove all rental units and add all new construction to be completed in the next 12 months. Here, you will arrive at your market size" the number of sellable households you have.
- Your market's turnover rate. Divide total sales in the last 12 months by total sellable households. This gives you the market absorption rate. Example: 500 units/10,000 sellable households = 5% absorption rate. Then divide 100 by the absorption rate and you will get your market's turnover rate in years. Example: $100/5\% = 20$ years. This means that people move every 20 years.
- How many outbound calls you can make in a day. First, time block and commit to a certain number of hours per day or week to call. Then, call for 30 hours, average the number out, and round down to the nearest 5. Example: If you average 12 calls an hour, round down to 10. Then multiply the number of calls you can make per hour by the number of hours you call per day, per week, and per month.
- How many in-person meetings you can do in a day. First, time block and commit to a certain number of hours per day or week to meet people face to face. Make prospecting meetings 30 minutes in reality, but give yourself 45 minutes. Also, factor in travel time and round-up here. Then see how many meetings you can achieve per week and month.

Sales forecasting should be done from the bottom up, not top down. Top-down sales forecasting means you look at the market, decide what percentage you're going to capture, and figure out your revenue. For example: "1,200 sales are projected in my target market for this year. I had a 1 percent market share last year; I think I can get that to 2 percent this year, so I will do 24 deals this year." Bottom-down sales forecasting means you look at your level of activity for acquiring clients, factor in your skill level at acquiring clients, and figure out your revenue based real action, real numbers and real situations.

Here's an example for relationship and referral-based agents: "I will prospect 480 people this year. My markets turnover rate is 15 years. Therefore, 32 people will move. My close ratio is 50 percent; therefore, I will get 16 deals from prospecting. I have also, on average over the last 3 years, converted 2 percent of my database into referrals. My database (of strong relationships) is 516 people, therefore, I can project 12 referrals."

Here's an example for lead generation-based realtors: "I get, on average, 3 leads per day. That's 1095 per year. 50 percent are junk, 60 percent already have an agent, and I only get appointments with 75 percent of the remaining. That's 164 appointments. Fifty percent aren't moving in the next 12 months, and I win 33 percent of these leads. That's 27 deals."

Here are other numbers to be conservative on:

- How many people you convert in your database into referral generators. Average out your performance over the past 3 years and round down to the nearest percent.
- The percentage of leads that are junk (the trend is getting worse), how many have an agent, how many you get appointments with, how many aren't moving in the next 12 months, and how many you win.

And here are the benefits of a bottom-up sales forecasting approach with conservative data points

- You will more likely stay under budget/spend less for non-revenue producing purchases and, therefore, profit when you beat your sales forecast.
- Don't be cheap when it comes to physical equipment. Good equipment increases the speed and quality of performance.
- Always be frugal with meals and entertainment. Eat less. Drink more free water. You'll be healthier, and so will your bank account.
- Spend more money to maximize the events you go to, and choose to go to fewer events.
- Decide to go premium or value with your personal website. Don't waste money in no man's land.
- Spend as little as possible on non-revenue producing tools (i.e., CRM, email marketing software, social media tools, etc.). Do your research because there are usually free options that will work.
- Revise your sales forecast and budget it every quarter. Sales forecasts and budgets should not be done once a year. By doing it quarterly, you'll more quickly learn: The major levers to increase revenue/profit.

Today's world moves fast and you need your strategy to adjust. You need to spend money to make money.

"I'm a cold caller. I'm a door-knocker. I'm a referral-based agent. I don't need to spend money to make money."

Compared to people who build their business on print marketing, online advertising and lead generation, you're right. However, if you compare yourself to your peers who build their business the same way you do, the person who spends more money, makes more money, guaranteed.

If you're a cold caller, spend money on your phone, headset, computer, scripts, health, and list-making to do more calls. If you're a door-knocker, spend money on your health, shoes, and car to knock on more doors. Invest in appearance and items of value to be better at door-knocking. If you're a referral-based agent, spend money on your current database to get more referrals. Invest in building your database to get even more referrals.

Play to your strengths. If you're not tech-savvy, don't use lots of technology, software, and digital marketing systems to build your business. Sixty percent of homeowners pick their agent based on relationships and referrals, so go all in with easy-to-use, low-tech business management systems, and build your business by talking to people through the phone and face to face.

The worst thing you can do is get sucked into a space you don't feel confident in and waste time figuring stuff out when you can keep things simple and hustle the old-school way. If you don't actually like people, that's OK. There are lots of ways to make money in real estate. Go all in with digital marketing, lead generation, and email marketing, and look at working with investors. The worst thing you can do is kid yourself and believe you're personable when you're not.

We know what makes
a first impression out
of a foyer.



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