

**kw** SOUTH VALLEY

# POWER MIX '26

Mentality • Mastery • Momentum

BUSINESS PLANNING CLINIC





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# Mentality • Mastery • Momentum

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**Mentality** means the way a person *thinks, feels, or approaches life or situations*- their overall mindset or attitude.

It's shaped by beliefs, experiences, and habits of thought.

For Example:

- A **growth mentality** means believing you can Improve through effort and learning.
- A **scarcity mentality** means focusing on what you lack rather than what's possible.
- A **winning mentality** means consistently thinkin and acting like someone who expects success.



# Mentality • Mastery • Momentum

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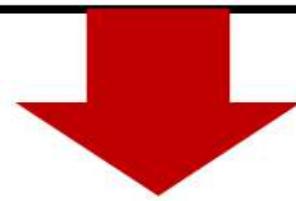
In short, your **mentality** is the mental framework that determines how you interpret challenges and opportunities.

# So, what actually changes?

When the market has shifted, there are fewer **TOTAL** transactions, buyers and sellers respond differently, and leads don't pour in like they used to.

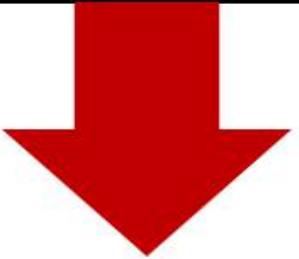


If you're **NOT** actively generating leads, you're seeing a slowdown in your business.



Lead generation truly **IS** your business—without leads, you have no sales, no closings, and no income.

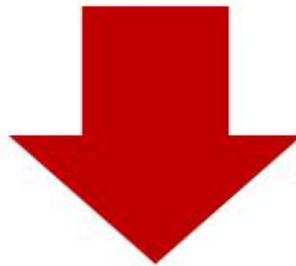
Being successful in this market is like fitness. It is the workout *plus* the diet. Not one or the other. It's both.  
It's 'and' not 'or'.



As an agent, the workout is the daily lead generation  
and the diet is the prep to do the lead generation.

An agent in a shifting market must have a shifting mindset.  
What worked last year is not relevant anymore.

**Who do I have to be today to win is all that matters.**



The question we must answer is:

*Who do I have to be today to win?*

**That's the only question that matters!**

# The 5 Truths about Shifts

1. Markets shift — this is a way of life.
2. When markets shift up, both reactive and proactive lead generation techniques work. When markets shift down, only proactive works fast enough.
3. Make no mistake, when the market shifts, new strategies are required.
4. The issue is not so much the shift, but how long we're in it.
5. In a downshift, it is “all hands on deck” time.

# Resilience: Bend, Don't Break

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## Four levers

*Physiology*: sleep, fuel, movement

*Attention*: focus & recovery

*Meaning*: purpose & values

*Connection*: ask for help; offer help

**Stop • Breathe • Notice • Reflect • Respond**

# Mentality • Mastery • Momentum

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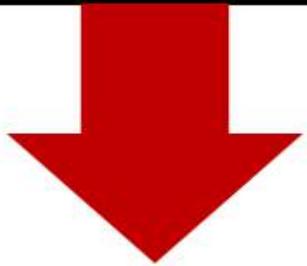
## Mentality Builders: **RESILIENCE**

**Resilience** is the ability to adapt well and recover quickly from challenges, adversity, or change.

It's not just about "bouncing back," but also about growing stronger through difficulties.  
In leadership and team development contexts, resilience includes:

- *Emotional steadiness* – staying calm and effective under pressure
- *Adaptability* – adjusting to change and uncertainty with a positive outlook
- *Perseverance* – maintaining motivation and focus despite setbacks
- *Growth mindset* – viewing challenges as opportunities to learn and improve

These next months of what you do... and don't do...  
will define your career.  
You will be glad you did or wish you had!



We are all rookies today in a sense.  
In fact, 87% of all agents have only sold homes in a  
market where they're worth more money each month.

# Mentality • Mastery • Momentum

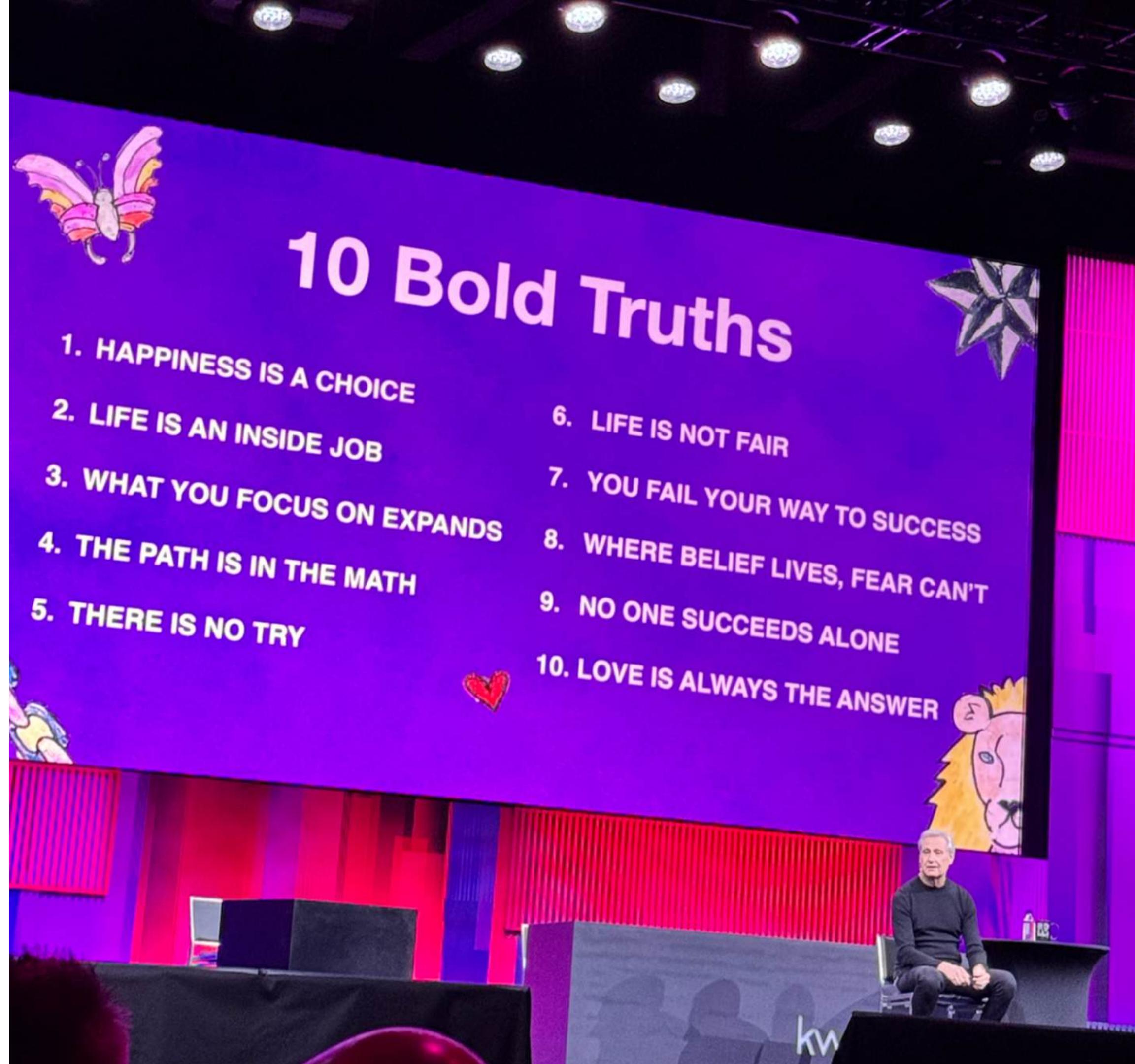
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## Mentality Builders: **EMOTIONAL INTELLIGENCE**

**Emotional Intelligence (EI)** is the ability to recognize, understand, and manage your own emotions, as well as to recognize, understand, and influence the emotions of others.

It involves five key components:

1. *Self-awareness* – understanding your own emotions and how they affect your behavior and performance.
2. *Self-regulation* – managing impulses, emotions, and reactions in healthy, constructive ways.
3. *Motivation* – using your emotions to stay focused, resilient, and driven toward goals.
4. *Empathy* – recognizing and understanding the feelings and perspectives of others.
5. *Social skills* – building and maintaining healthy relationships through communication, collaboration, and influence.



# 10 Bold Truths

1. HAPPINESS IS A CHOICE
2. LIFE IS AN INSIDE JOB
3. WHAT YOU FOCUS ON EXPANDS
4. THE PATH IS IN THE MATH
5. THERE IS NO TRY
6. LIFE IS NOT FAIR
7. YOU FAIL YOUR WAY TO SUCCESS
8. WHERE BELIEF LIVES, FEAR CAN'T
9. NO ONE SUCCEEDS ALONE
10. LOVE IS ALWAYS THE ANSWER



Want to  
Study Up?



- 1. MREA**
- 2. MREI**
- 3. Shift**
- 4. The One Thing**
- 5. KW Playbooks**
- 6. TCPA Compliance Pointers**
- 7. The MREA Podcast**



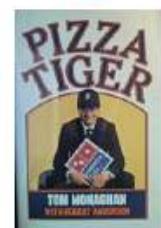
# Gary Keller's Top 15 Books on Ways to Think About Business

## The 15 Books that Helped Shape the Way that Gary Keller Thinks About Business

1

The  
Bible  
(or spiritual book  
of your choice)

2



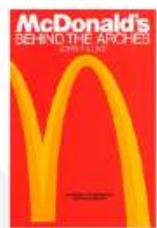
*Pizza Tiger*  
by Thomas Monaghan  
and Robert Anderson

3



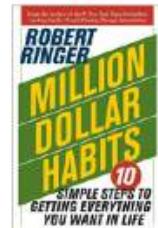
*Platform Revolution: How  
Networked Markets Are  
Transforming the Economy - and  
How to Make Them Work for You*  
by Geoffrey G. Parker, Marshall W. Van  
Alstyne, and Sangeet Paul Choudary

4



*McDonald's:  
Behind the Arches*  
by John F. Love

5



*Million Dollar Habits:  
10 Steps to Getting  
Everything You Want in  
Life* by Robert Ringer

6



*13 Fatal Errors  
Managers Make  
and How You Can  
Avoid Them* by W.  
Steven Brown

7



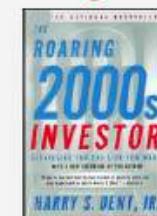
*Give and Take: Why  
Helping Others  
Drives Our Success*  
by Adam Grant

8



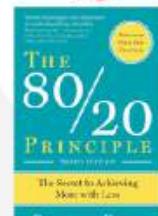
*Masters of Enterprise: Giants of  
American Business from John  
Jacob Astor and J.P. Morgan to  
Bill Gates and Oprah Winfrey*  
by H.W. Brands

9



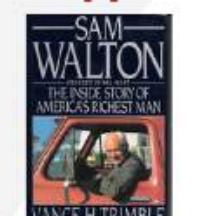
*The Roaring 2000s  
Investor: Strategies  
for the Life You Want*  
by Harry S. Dent, Jr.

10



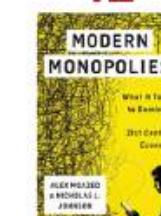
*The 80/20  
Principle: The  
Secret to Achieving  
More with Less*  
by Richard Koch

11



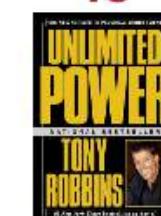
*Sam Walton: The Inside  
Story of America's  
Richest Man*  
by Vance H. Trimble

12



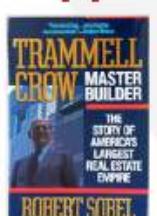
*Modern Monopolies: What  
It Takes to Dominate the  
21st Century Economy*  
by Alex Moazed and Nicholas  
L. Johnson

13



*Unlimited Power:  
The New Science Of  
Personal Achievement*  
by Tony Robbins

14

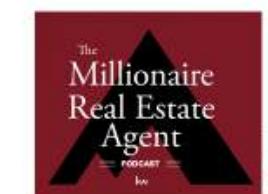


*Trammell Crow, Master  
Builder: The Story of  
America's Largest Real  
Estate Empire*  
by Robert Sobel

15



*Six Thinking Hats: An  
Essential Approach to  
Business Management*  
by Edward de Bono



TCPA Reminder: Remember to comply with the TCPA and any other federal, state or local laws, including 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.

# Mentality • Mastery • Momentum

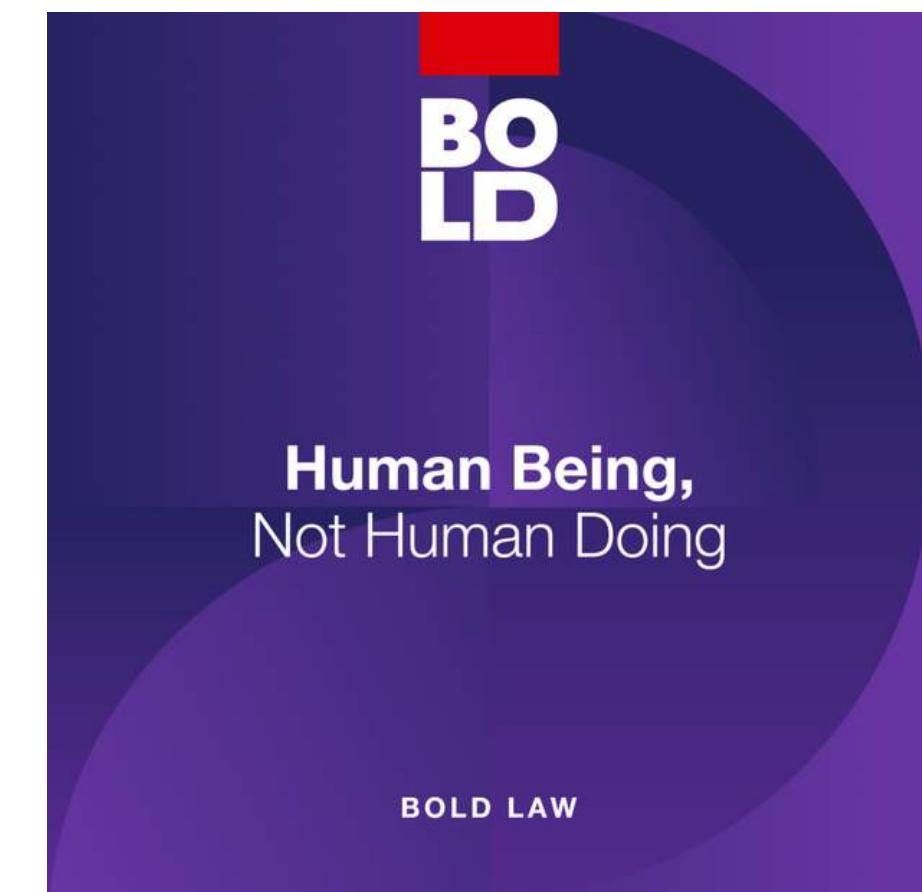
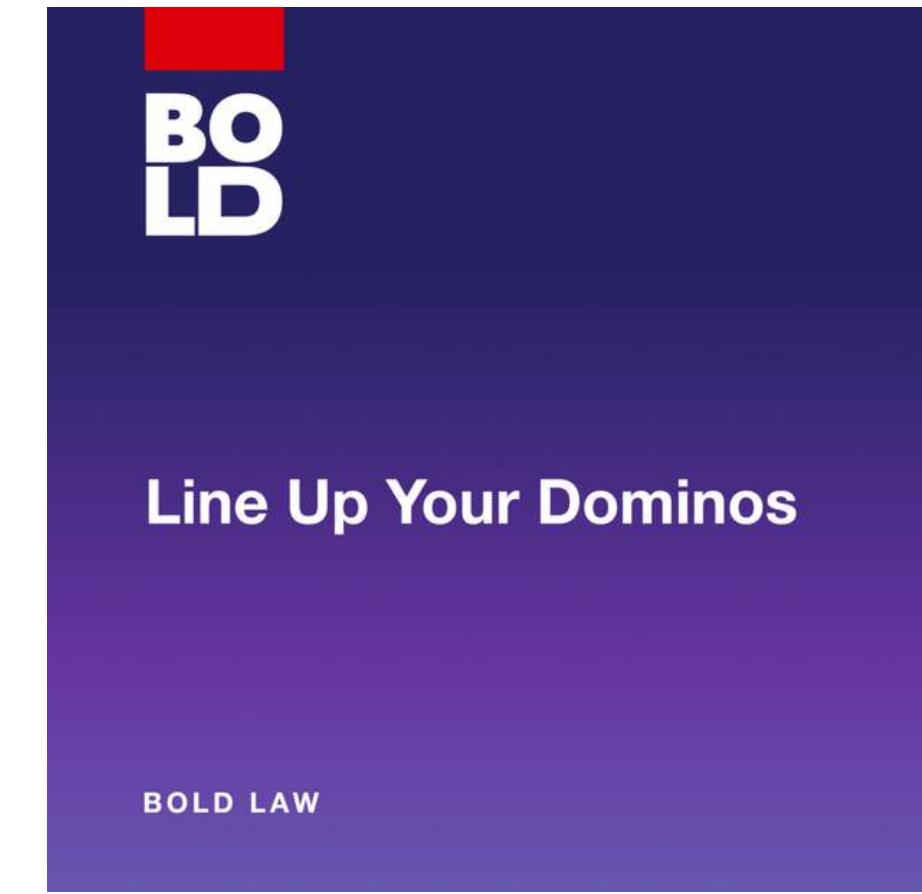
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## MASTERY

**Mastery** is the *pursuit of excellence through continual learning, practice, and refinement of skill.*

It's not about perfection—it's about *progress, discipline, and a deep commitment to growth.*

- **Consistent improvement** – striving to be better each day
- **Intentional practice** – focusing effort on learning and feedback
- **Depth of understanding** – knowing not just how to do something, but why it matters
- **Ownership** – taking responsibility for personal and team development
- **An Innovative Mindset** – seeking skills, tools, practices, systems to Improve



**BO  
LD**

Money Doesn't  
Change You,  
**It Reveals You**

BOLD LAW

**BO  
LD**

Time Is More Valuable  
Than Money

BOLD LAW

**BO  
LD**

**Life Is Short, Get Busy**

BOLD LAW

**BO  
LD**

**Believe More,  
Fear Less**

BOLD LAW

**BO  
LD**

If it's Not on  
Your **Calendar**,  
It Doesn't Exist

BOLD LAW

**BO  
LD**

**Charge The Storm**

BOLD LAW

**BO  
LD**

Success is Simple,  
Not Easy

BOLD LAW

**BO  
LD**

Business Growth  
Never Exceeds  
**Personal Growth**

BOLD LAW

**BO  
LD**

**Do Less** Better

BOLD LAW

**BO  
LD**

**Be - Do - Have**

BOLD LAW

**BO  
LD**

To Change Your Emotion,  
**Change Your Motion**

BOLD LAW

**BO  
LD**

**Logic + Emotion =  
Best Decisions**

BOLD LAW

**BO  
LD**

I Own Things,  
Things Don't Own Me

BOLD LAW

**BO  
LD**

**It's Not Over Til It's Over**

BOLD LAW

**BO  
LD**

Your Network is  
**Your Net Worth**

BOLD LAW

**BO  
LD**

Change the Way You Look  
at Things and **the Things**  
**You Look at Change**

BOLD LAW



BO  
LD

**No Pressure -**  
No Diamonds

BOLD LAW



BO  
LD

**Change Is Inevitable -**  
Participation Is Optional

BOLD LAW



BO  
LD

Your Video Must  
Match Your Audio

BOLD LAW



BO  
LD

**Clarity is power**

BOLD LAW



BO  
LD

**All Work Expands to**  
Fill the Time Allowed

BOLD LAW



BO  
LD

You Can't Please Everyone

BOLD LAW



BO  
LD

Success Leaves Clues

BOLD LAW



BO  
LD

Life is an **After-Thought**

BOLD LAW

**BO  
LD**

You Get What You Tolerate

**BOLD LAW**

**BO  
LD**

You Teach People  
**How to Treat You**

**BOLD LAW**

**BO  
LD**

The People in Your Life  
**Either Create a Circle  
or a Cage**

**BOLD LAW**

**BO  
LD**

Believe People When They  
**Show You Who They Are**

**BOLD LAW**

**BO  
LD**

Grass is **Greenest**  
Where You **Water It**

**BOLD LAW**

**BO  
LD**

Your Life Is a  
Byproduct of Your  
Lifestyle

**BOLD LAW**

**BO  
LD**

Your Power Is Your Power

**BOLD LAW**

**BO  
LD**

**Life Is Easy** if You  
Accept That It's Hard

**BOLD LAW**

# CONVERSATION Frameworks



# The Play

On Friday, August 5, 2016 at 12:25 PM, Gary sent an email to a handful of agents.

**He called the play:**

*“Make no mistake. You’re in a shift. It’s not an economic shift (unemployment is below 5%, GDP is around 2%, inflation is less than 2% and actual real income is slightly up). This is about the normal cycle that happens in real estate and it’s time. You’ve used up your extra buyers and now there is price weariness and fatigue. It’s caused naturally by real estate getting too expensive too quickly. So days on market increase rapidly, offers come in slower and thus lower with not as much competition. The trick is to get out in front of it. Right now.*

*How?”*

- 1. Lower your expenses.**
- 2. Double your lead generation efforts.**
- 3. Triple your focus on lead conversion to appointment.**
- 4. Increase your leverage.**
- 5. Increase your training effort.**
- 6. Increase your visibility to communication.**

# 1. Lower Your Expenses

*"Lower your expenses every month for the next nine months. Make it a game and acknowledge and reward those who help. Reducing is not a one-time event. You review everything every month from now 'til next March. You'll be surprised at what you miss each time and how once you drop something, you then realize the next month you can drop it even lower..."*

## One way to start this:

### 1. Compile all your statements from the last 70 days.

### 2. Get 3 different color highlighters:

1. **Color 1:** The items that you 100% need to run your business & your life. (Examples: rent, mortgage, etc.)
2. **Color 2:** The items that you don't need but are nice to have. (Examples: memberships, subscriptions, apps.)
3. **Color 3:** Items where you don't even know what it is! You'll be shocked how much of this color there is.

3.

**1.**  
**Must Have**

Leave them  
alone.

**2.**

**Nice to Have**

Ask how much you  
really value this &  
reduce.

**3.**

**Cancel Them**

(now)

The truth is:

There is **no other activity** you can do  
each day that will do more to improve your  
work life **than generating more leads.**

## 2. Double Your Lead Generation Efforts

*“Double your lead generation efforts. Sit down with your plans and make strategic decisions right now and execute quickly. Be lean, mean, and move fast.”*

**One way to start this:**

**CURRENT STATE**

1. Activity \_\_\_\_\_
2. Time Spent \_\_\_\_\_
3. Leads Generated \_\_\_\_\_
4. Appointments Set \_\_\_\_\_

**FUTURE STATE**

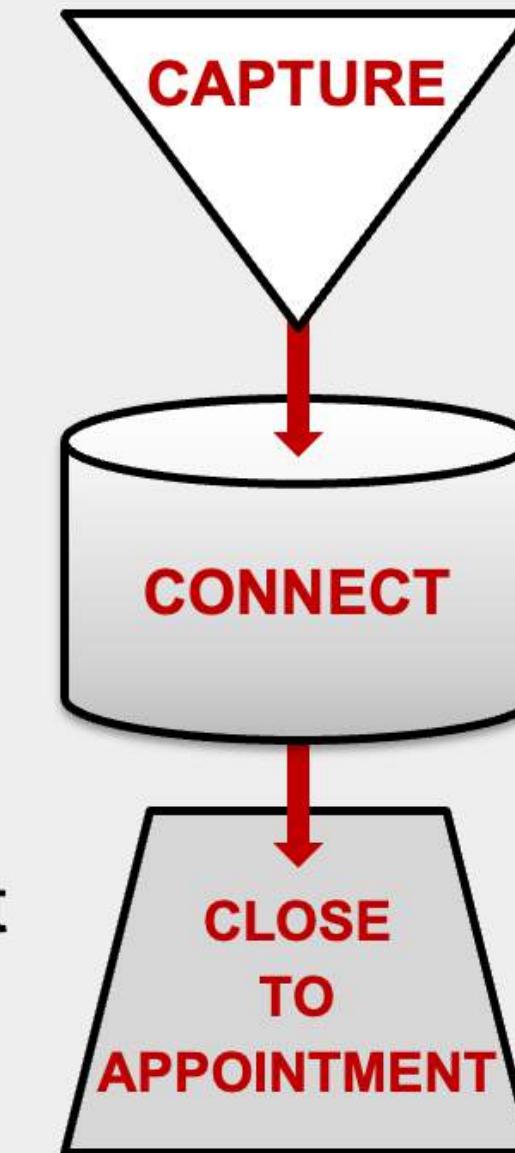
**X2**

### 3. Triple Your Focus on Lead Conversion to Appointment

*Triple your focus on lead conversion to appointments. Again, sit down with your plans and make strategic decisions right now and execute quickly. The battle will be for the truly motivated buyers and sellers and there will be a fight for them. Win that fight.*

#### One way to start this:

1. "I capture potential client's contact information."
2. "I contact every one of them."
3. "I ask everyone of them to connect for coffee or to talk."



Sounds too simple? Good. The best answers are always the simplest. Yet everything naturally becomes more complicated.

## 4. Increase Your Leverage

*“Increase talent recruiting effort. So, you hit it doubly hard right now and stock up for the winter with the right people.*

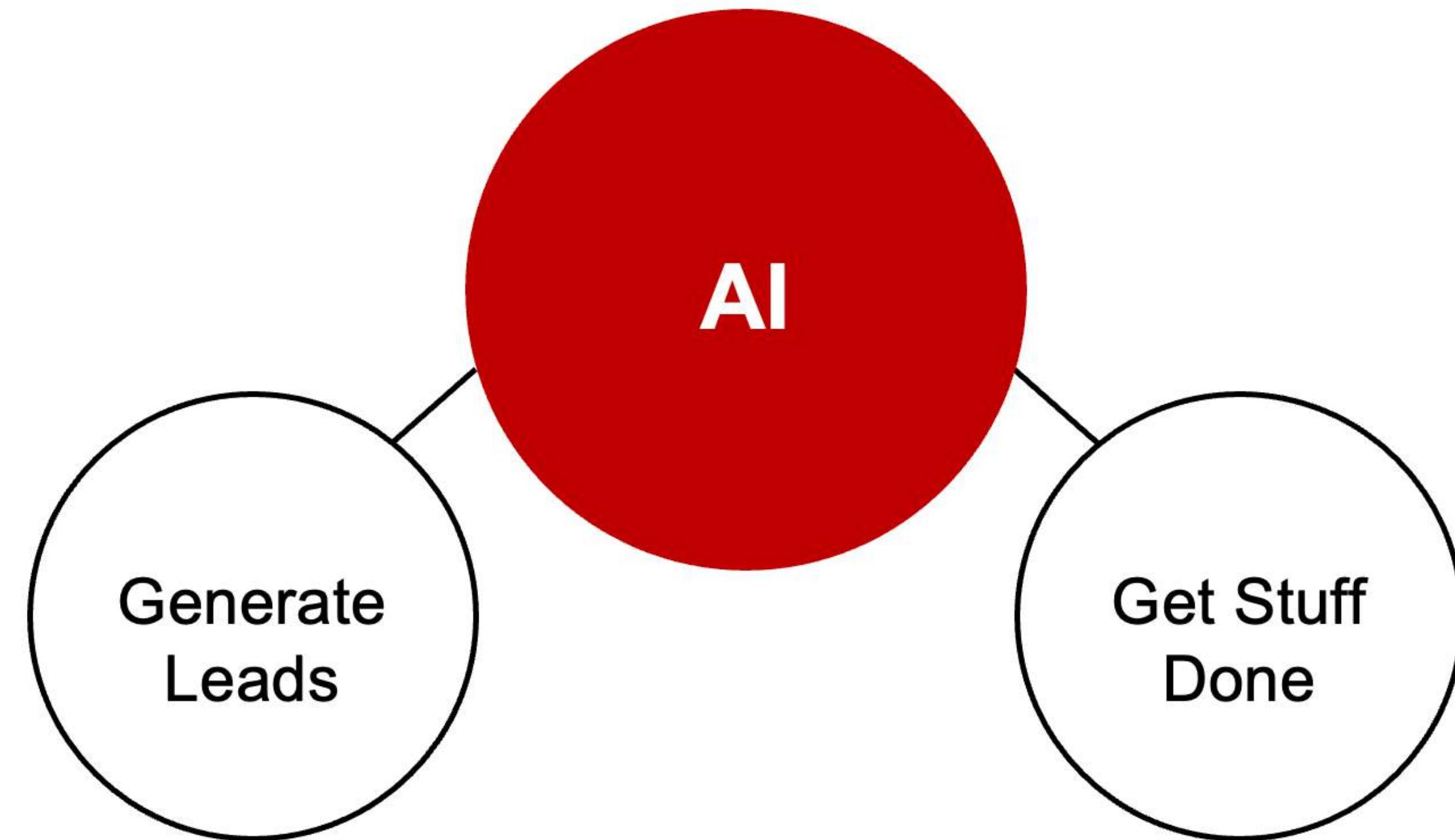
*I’d guess that 70% of the agents currently have never seen a shift down and don’t know what it looks like. It’s an opportunity for you to pass out the “Shift” book and start the dialogue early. Trust me, you will look really, really, really smart to them over the course of the next year.”*

**One way to start this:**

Think of leverage in two ways:

- 1. Technology + (AI)**
- 2. People**

# Two Buckets of AI Use

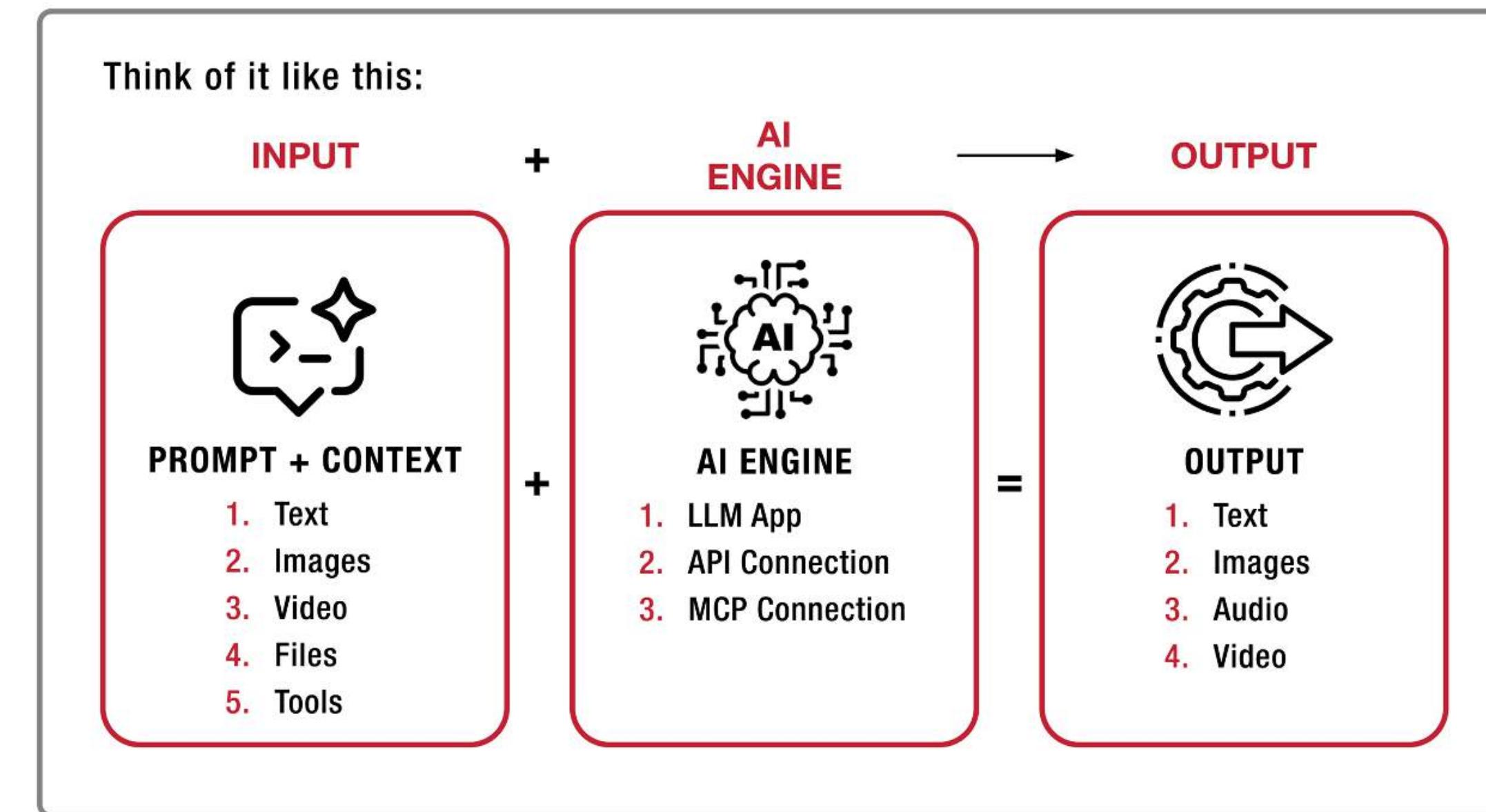


# How Large Language Models Work

- 1. Understand Large Language Models (LLMs)**
- 2. Pick Your LLM**
- 3. Personalize Your AI Assistant with a Master Prompt**
- 4. Perfect Your Prompts**
- 5. Put Your Prompts Into Action**

# Understand Large Language Models (LLMs)

LLMs are incredibly complex code strands that are trained on massive amounts of textbooks, websites, articles, and other materials to recognize patterns in how we use language.



# Pick Your LLM

Here's a quick rundown of the top-5 AI apps and their strengths:



## ChatGPT (Jack of All Trades)

Developed by OpenAI, this is the most used AI in the world. Think of it as your easy-to-work-with team member with few weaknesses. It's good at almost everything.



## Gemini (Integrated Researcher)

Has an advantage of being connected to the Google ecosystem and the Web. Gemini is a powerful research assistant that saves you time within the Google Workspace.



## Claude (Polished Writer & Nerdy Coder)

Excels with natural conversations and writing complex code. Think of Claude as your esteemed editor who can pull all-nighters writing lines of code for that app you've been dying to launch.



## Perplexity (Answer Engine)

Is less of a creative writer and more of a direct answer engine that cites its sources while saving you time surfing the wrong websites. Think of it as a meticulous fact-checker that excels at specific questions and answers.



Grok

## Grok (Edgy Brainstormer)

Designed to be more conversational, witty, and maybe even a bit controversial. Grok has many of the same features as ChatGPT with the added feature of real-time information from X.

**AI Disclaimer:** Any text or materials generated by artificial intelligence (AI) should be reviewed for accuracy and reliability as there may be errors, omissions, or inaccuracies. The use of generative AI is subject to limitations, including the availability and quality of the training data used to train the AI model used. Users should exercise caution and independently verify any information or output generated by the AI system utilized and should apply their own judgment and critical thinking when interpreting and utilizing the outputs of generative AI.

# Personalize Your AI Assistant with a Master Prompt

**Personalization:** Acts as your default instructions for all future interactions. You fill it out once to set expectations of your preferred writing style, tone, format, and role. This is how your assistant will interact with you each time until you make updates.

**Memory:** With memory, AI acts like your executive assistant that never forgets key facts about you, your goals, your quirks, and past conversations so you don't repeat yourself.

**Try This – Take 5 minutes to download one or each of them and create an account.**

**PLUS – Download the *NEW AI Playbook* to get started!**



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# 5. Increase Training Effort

*"Increase training effort. You think you're doing all you can do, but then the market shifts and you realize there is more to do. Just quadruple what you've been doing. Not kidding. Just load up on it and watch what happens."*

## One way to start this:

1. Check off on this list the skills & trainings you need right now and take those classes.
2. Then, after you learn it, teach it to someone else!

1. **Lead Generation**
2. **Lead Conversion**
3. **Pricing Ahead of the Market**
4. **Price Improvements**
5. **Client Service & Negotiating**
6. **Follow-Up**
7. **BOLD**

# The Lead Generation Plays

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# Google Reviews

## Build Consumer Confidence with Google Reviews

From Nick Waldner, Ellicott City, MD

Nick Waldner and his team sell over 450 homes and \$200M in volume per year. They credit a large portion of that success to their online presence and 5-star reviews. Nick told us that, "online reviews are the fastest way to build trust with strangers who are looking to buy or sell real estate. They also help reinforce trust and brand awareness with your existing clients."



### Step 1: Choose to Deliver a 5-Star Level Experience



As the team leader, Nick's first job was to get everyone on board and focused on the same goal: 5-star level service. Everyone on the team must be focused and committed to delivering on their 5-star level experience.

### Step 3: Measure Your Success

By highlighting this program every week, Nick keeps it front and center with his team. They measure it and report back every week around their progress in the team meeting. Creating scorecards and contests around the results produce even more drive for team members to succeed.

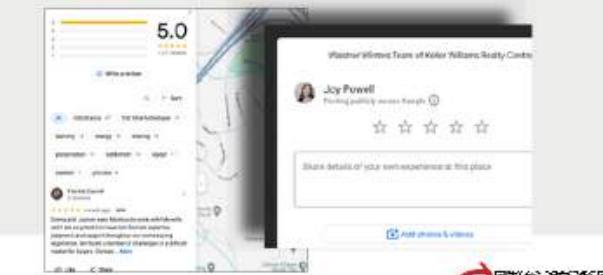
1. Appointments passed to the team
2. Year to Date Closed and GCI earned
3. % of 5-Star reviews received YTD, MTD

They also have their ISA share stories of clients who called and only want to work with the Waldner Winters Team after their extensive online research!

### Step 5: Create Your Google Review Page

This step is so important and often missed! If you are going to ask people to give you a Google 5-Star Review, then you need a place to direct them. If you just tell them to "go to Google", it is then a 5-step process to leave the review! The goal is to make it super easy for them.

1. Purchase a simple URL domain name on Godaddy. Nick purchased [www.wwreview.com](http://www.wwreview.com).
2. Go through the Google process to leave yourself a review and direct your new URL to the very final step so all they need to do is click Reviews, write a review, and click submit!



### Step 2: Set Expectations

In order to get a consistent outcome, you must have consistent language. Everyone on Nick's team learns the five star review discussion framework to be used with every buyer and every seller at the end of their first consultation meeting:

*"Mr. and Mrs. Seller, thank you so much for having me and I hope this meeting helped illustrate why we are the right team for you. Speaking of our team, I do want to go over one more aspect that we care deeply about. It is our five star level experience. Everything we do and all the systems we built were designed around delivering to you our five star level service. Everyone in our group is focused on you and your goals throughout the transaction. We will be consistently checking in to confirm you are receiving our 5-Star service goal. Would that be ok?"*

*"Yes."*

*"Great, then I only have one last request. When we deliver on our five star level experience, would you be willing to introduce us to any friends or family that are thinking about selling AND also take it one step further by leaving us a five star review on Google?"*



### Step 4: Reward Your Team

On Nick's team, the administration staff earns a \$25 bonus for every five star review obtained from a past client. At over 400+ transactions, that's \$10,000 of bonus money to pass around. If they get multiple clients from the same transaction (husband and wife for example), the bonus is doubled! On top of the monetary bonus, the admin team also receives half days on the first Friday of each month for the next quarter when they achieve 75% or higher in closed five star reviews that quarter!

### Step 6: Use Reviews to Gain Trust

**5.0**



1,611 reviews

The most common words out of the mouths of Nick's team are "don't take my word for it, just read our 1,600 5-star reviews on Google!" They told us this is wildly powerful for family, friends, and strangers alike.

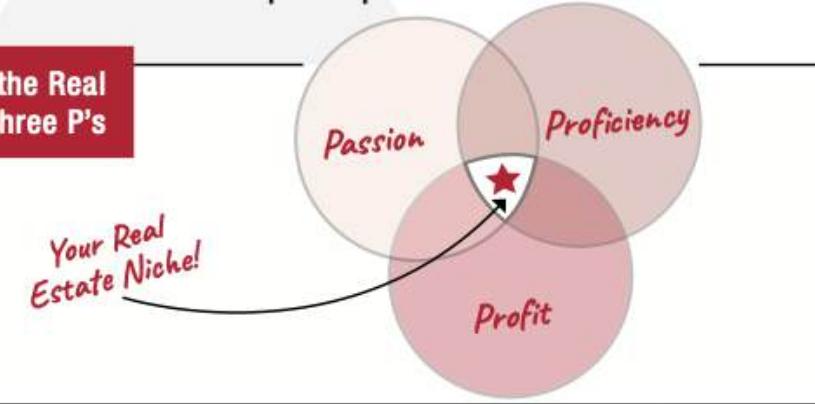
**PRO TIP:** It's all about consistency. In effort, in messaging, among team members, in your email signature... the message must be consistent:  
*"Leave us a 5-star review!"*

# YouTube



Sean Cannell is a YouTube strategist, CEO of Think Media, co-author of *YouTube Secrets*, and a leading expert in online video marketing. He helps entrepreneurs grow their influence through video by overcoming fears and dispelling FOPO—Fear of Other People's Opinions.

## Phase 1: Realize You Are the Real Estate Agent Star of the Three P's



## Phase 2: Short Videos

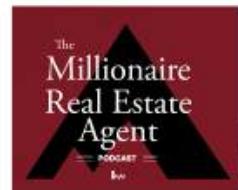
1. Prepare a quick plan:
  1. Hook: How will you grab attention?
  2. Teach: What value are you delivering?
  3. Call to Action (CTA): How do viewers contact you?
2. Start recording vertical videos on your smartphone in selfie mode. A car is a great place to start!
3. Press record. Don't talk for more than 90 seconds. Record it 2-3 times if needed, then pick your favorite take. Don't overthink it.
4. Add captions to your video (Sean recommends Capcut).
5. Post on YouTube! Share on your other socials, too. Your audience is already searching for content—if you don't create it, they'll find someone else.
6. Post regularly. Start with once per week and increase frequency as you grow more comfortable.

**Pro Tip:** Not sure what to say? Find story ideas using YouTube's auto-fill search bar. Type one or two words—your city, your niche, etc.—into the main search bar and use YouTube's auto-suggestions as your next video title.

## Phase 2: Long-Form Videos

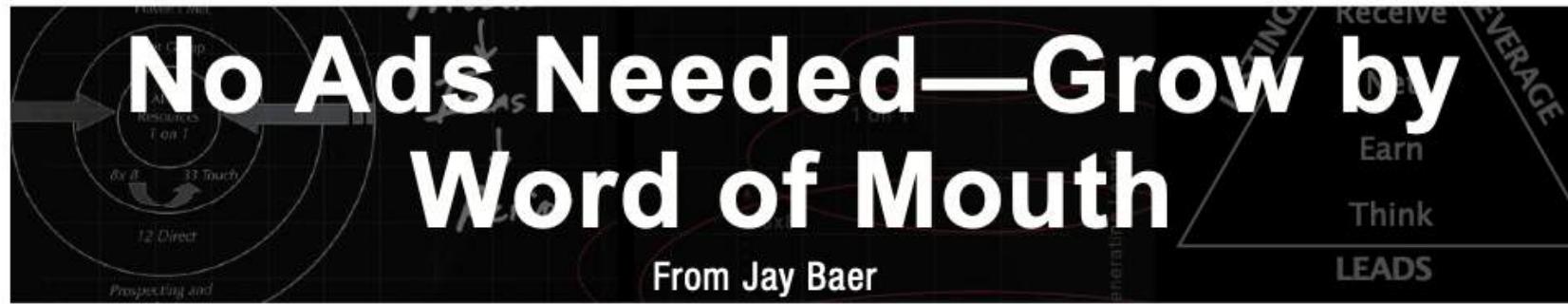
1. Prepare a long plan. Use the same questions as above, but take it a step further. Long-form videos typically range from 6 to 20 minutes. If short videos are your “sample” content, long videos are your “relationship-building” content.
2. Flip your camera horizontally. You can still use selfie mode on your phone, in your car!
3. Press record! Feel free to reference notes, hold up pictures, or use props to enhance your video. Sean says this doesn't need to be fancy. If your content is valuable, the video will be watched.
4. Post regularly. Start once per week and increase frequency as you are able.
5. Track results. Don't forget to track your YouTube leads and the closings that follow!

**Key Takeaway:** When viewers have the opportunity to watch you and learn from you online, trust is accelerated. The viewers turn into clients who are ready to work with you because they come to you pre-interested and pre-motivated.



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# Talk Triggers



Jay Baer is a renowned marketing and customer experience expert, keynote speaker, and author of many best-selling books, including *Talk Triggers: The Complete Guide to Creating Customers with Word of Mouth*. Jay reminds us that the best marketing is word-of-mouth marketing because it's the one (and possibly only thing) that AI cannot fake. By strategically implementing "Talk Triggers," real estate professionals can encourage referrals, making clients their most valuable marketing asset.

## Step 1: Brainstorm Your Talk Trigger

What are you already doing that's different? Think about how to make it even better. If you're unsure what stands out to your clients, Jay says—ask them! Interview your clients and ask what they tell people about you.

## Step 2: Create Your Talk Trigger With the 4 R's

Repeatable	Remarkable	Reasonable	Relatable
Something everyone in your orbit can access. Not new, old, big, or small clients - all of them! For example, Jay says it could be something you do at all showing and listing appointments.	Simply put, it needs to be worthy of a remark. Jay warns that it's not a free pen!	It can't be so outrageous that your clients think it's fake (or can't be repeatable—see before).	Needs to make sense in the context of your real estate business. Jay tells a great story about a locksmith who provided free safety checks with each appointment. When it comes to things related to real estate, your options are vast—home maintenance, home design, vendor gifts, in-home events, etc.

## Step 3: Test Your Talk Trigger

1. **Observe Talkability.** When following up with a client who experienced your Talk Trigger, Jay says you'll know it's effective if they mention it unprompted.
2. **Ascertain Talkability.** If the story isn't coming back to you organically, Jay recommends you ask these questions:
  1. Have you told anyone about our time together?
  2. What did you tell them?
  3. Did you ask them about 1, 2, Talk Trigger, 4, or 5? (Hide the Talk Trigger in a list of 5 things you have done with the client.)

## Step 4: Implement Your Talk Trigger

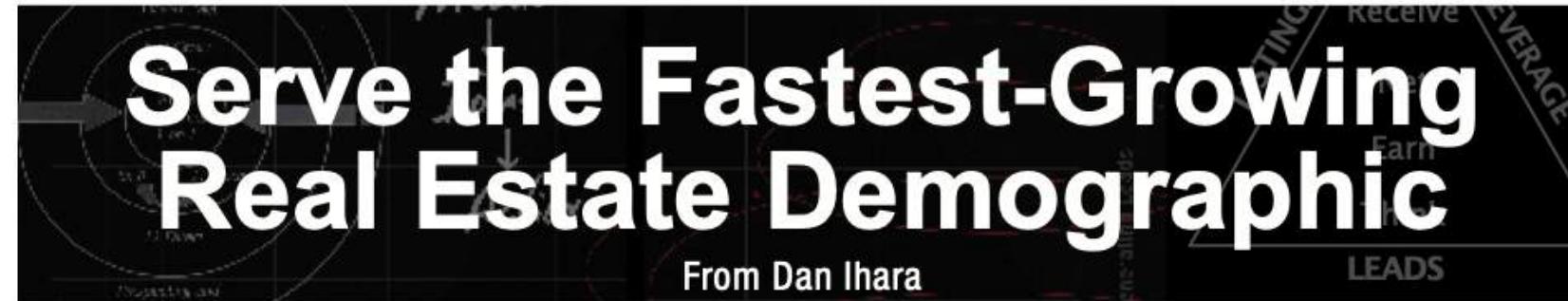
When 15% or more of your test customers tell your story to another person, Jay emphasizes, you've got yourself a winner! Roll it out to everyone!



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# Niche Markets



# Serve the Fastest-Growing Real Estate Demographic

From Dan Ihara

Dan Ihara is the founder of The Ihara Team at Keller Williams® Honolulu, specializing in senior relocation, legacy planning, and real estate wealth strategies (including 1031 exchanges, trust sales, and probate). With 20 years of experience and more than \$1 billion in closed transactions, his suite of services guides older adults and their families through downsizing, moving, and estate planning with compassion.

## Step 1: Learn Everything You Can About Senior Housing in Your Market

- Search the internet to collect and create a list of senior retirement communities and care homes in your market.
- Call the locations on your list and make appointments to tour the communities. During the tours, take notes:
  - How much does it cost?
  - What will life look like for a resident (meals, activities, events, etc.)?
- Identify which communities on your list will let you host a senior relocation seminar on their campus.

## Step 2: Create a Senior Relocation Seminar

- Zoom is an OK option, but Dan recommends in-person events—they're more effective in building trust and setting appointments.
- Create an agenda:
  1. Ask Questions: Is your home too big now that the kids are gone? Do you have a bedroom downstairs? Do you have to walk upstairs often? Are you tired of cooking and cleaning? Is your home too much work to maintain? If you could move somewhere else, where would it be?
  2. Explain Two Types of People: Proactive and Reactive
  3. Show Options:
    1. Age in place with an in-home care budget.
    2. Move into a family member's home.
    3. Downsize to a smaller home.
    4. Move to a retirement community.
    5. Move to a care home.
  4. Schedule individual appointments. Be sure to ask who else should be invited (or not invited!).

## Step 3: Send an email to your database and invite them to your senior relocation seminar.

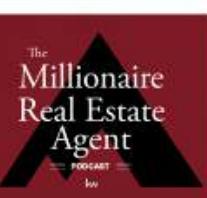
- Dan reminds us that everyone has parents or knows someone in the retirement phase!

## Step 4: Sign a Contract at the Appointment

- Prepare for the appointment by pulling the tax records, creating a CMA, and printing important documents.
- During the appointment, present a hard-copy calendar and write out the client's desired timeline. Indicate vendor needs and key events.
- Don't forget to ask about investment properties and be prepared to talk about capital gains tax.

## Step 4: Add to CRM

- Set up a special touch plan for senior relocation clients. Dan's touch plans include:
  - How-to videos that explain each step of the sale process and are emailed to clients as they move through each phase.
  - Weekly emails about wealth tips, current listings, client reviews, and/or client success stories.



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# Walking Groups

## Weight Loss and Market Share

During an agent interview a simple question was asked, "what is the key to your success?" The agent sat back and smiled and said, "well, I always struggled with my weight, you see I had too much of it and everything I tried didn't work. Until one day my MAPS coach challenged me to think outside of the box." The system below is the result of that conversation; it led to this agent controlling more than 60% of all the listings sold in her neighborhood and her losing over 85 pounds!

### 1. Get Outside The Box

Her MAPS coach challenged her to think outside the box and come up with an idea that would link her weight loss journey and her real estate lead generation together. She decided that in order to lose the weight she wanted to lose she was going to have to eat less and move more. For her, the struggle was around moving more. She decided that she was going to walk around her neighborhood 7 days a week.

### 2. Move Past Fear

She knew that we all have fear and her that her fears had been holding her back. She was afraid of what people thought of her appearance and what they would say if they saw her out walking. She decided that the best way to get past this fear was to simply "put it out there" and be proud of her journey. She created a postcard that she sent to every single house in her neighborhood that explained four things:

1. She is a real estate agent that lives in the neighborhood
2. She has always struggled with her weight
3. She is done struggling alone and she will be walking around the neighborhood every morning from 6am–7am starting at the park
4. She invited everyone and anyone to join her

### 3. Walk

She walked. A lot. Every day. As she walked her walking group grew. During the week she averages 15 people each day and on the weekends and holidays it can be as many as 40 people (they bring their spouses and kids).

### 4. Send the Postcard Every Month

Every month she sends a postcard updating her neighborhood on the group's wins and losses and milestones. She has created a community!

### 5. Provide Amazing Service

All agents strive to provide great service but she insists on it. She explained that, "you have to really crush it for people if you are going to see them every morning during your walk!"

# Agent to Agent Referrals



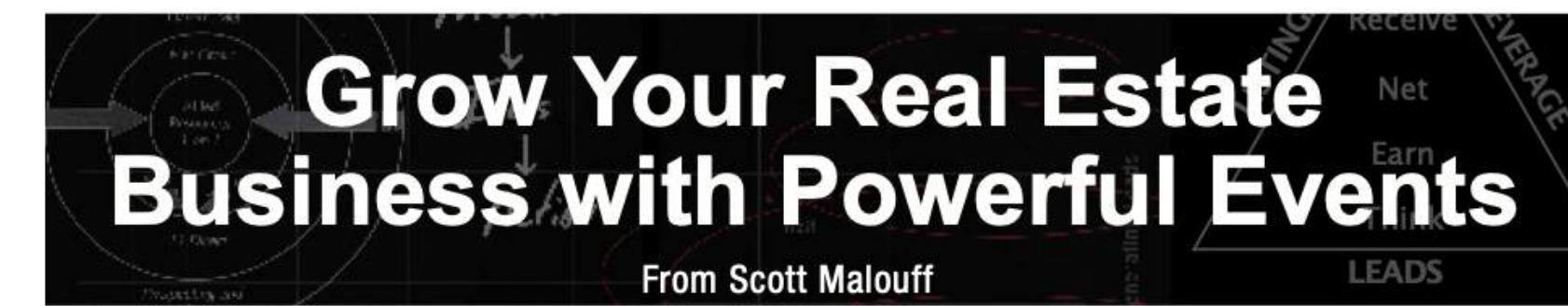
When Wendy Papasan went to her first Keller Williams Family Reunion event, she had a huge aha: real estate agents are the most connected people in the world. Despite sending 150 handwritten note cards to the agents that she had met at the event, she received only one note back. This sent Wendy on a journey to build a system that would help her stay in touch with agents and produce agent referrals.

Her approach involved sending simple, engaging emails that sparked responses, fostering two-way conversations. Over the years, this agent-to-agent referral strategy became a major revenue stream for Wendy's team, contributing between 25% and 40% of their business. Despite having to pay referral fees, Wendy views them as the cost of sale, emphasizing the effectiveness and efficiency of this approach.

- 1. Think BIG and start small.** We all want to generate tons of new business, and in that zeal, we often try to do too much or allow our systems to become too complicated from the start. Remember, all great **BIG** businesses start as great **SMALL** businesses.
- 2. Start to grow an agent database.** Many agents have client databases but few have referral partner or agent databases. Start by adding a tag to your current CRM or starting a new spreadsheet called "Agent Referral Partners." Add to this list consistently through meeting agents outside of your market at events or on social media.
- 3. Send a monthly email.** This email serves as the core of your agent touch program. The emails generally fall into two buckets:
  - 1. Questions** – If you want to be in a relationship, you must communicate! Ask simple questions seeking simple replies to deepen your relationships. A timely example that Wendy receives tons of replies from is, "What was your biggest aha from KW Family Reunion?"
  - 2. Value** – Share something that an agent in another market would find valuable or helpful. Try sharing this podcast!
- 4. Pick up the phone.** Try calling each agent in your database a few times a year to show that you care! Care calls matter for agent partners just like they do for customers!



# Micro/Macro Events



**Grow Your Real Estate Business with Powerful Events**  
From Scott Malouff

LEADS

Scott Malouff is a problem solver who knows how to invest in people. His early experience in club promotion and business management made real estate a natural jump in his career. From mega Christmas parties, to city philanthropy events, to intimate coffee dates, Scott's event planning tips will strengthen your network (and be fun!).

## 1. MICRO Events –

### Building Relationships With “50 First Dates”

1. Look through your database - or those you want in your database - and schedule one coffee, one lunch, and one dinner date every week, totaling 150 dates per year. Schedule coffee with people you want to be in business with, lunch with past clients, and dinners with VIP contacts. Over the year, aim to develop your “coffee date” relationships into “lunch” dates and then, eventually, “dinner” VIPs.
2. Approach each meeting as a connector and a teacher. Listen and learn: What are their goals, hobbies, family aspirations? The key is to find areas you can help them maximize their potential. For example, teach them time management, goal setting, etc.
3. After each meeting, use your CRM to make notes and tag contacts based on their interests. Tags allow you to quickly engage contacts when relevant opportunities arise, like sharing an upcoming event or offering Spurs tickets.

### 50 First Dates!

1 coffee date/wk (new connections) x 50
↓
+ 1 lunch date/wk (past clients) x 50
↓
+ 1 dinner date/wk (VIPs) x 50
= 150 dates a year!

## 2. MACRO Events –

### Community Impact and Business Growth

Scott's team plans philanthropic events or joins city events throughout the year. These events boost community engagement, brand awareness, and company culture.

Each year, Scott plans one large Christmas party sponsored by community vendors. Not only is the event a great time, but also the \$80,000 event actually raises money that pays for annual team awards, trips, city partnerships, and more.

If you're planning your first party, start small:

1. Choose a venue.
2. Set a budget.
3. Plan your sponsor outreach to offset price.
4. Invite guests, starting with your micro database. Estimate about 30% of those invited will attend.

### How to Secure Sponsorships

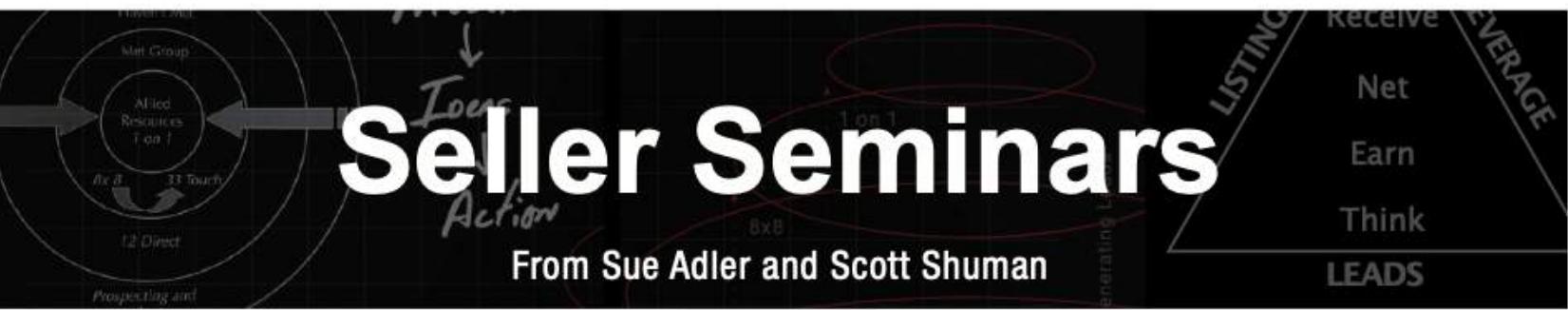
1. Identify Business Owners
  1. Personal Injury Attorneys
  2. Lenders
  3. Contractors
  4. Personal Services
2. Reward agents who successfully bring in vendors.
3. Schedule in-person meetings with sponsors and agents to build rapport.
4. Prepare a sponsorship level program with various tiers and clearly defined benefits. Scott's party sponsorships range from a \$500 Bronze to a \$10,000 Platinum.



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# Seminars



Sue Adler has built one of the largest teams in real estate. Together with her COO, Scott, they have created the ultimate seller classroom by educating future sellers early in the listing process. They list more homes in four cities than anyone else. Here is how they did it:

## #1 Create the Seller Workshop

Start by getting a list of the top 5-10 questions that you receive when you're on listing appointments. This becomes the framework for your presentation. Weave the answers into a discussion that explains the listing process from start to finish. Your workshop shouldn't exceed one hour. Scott and Sue told us some of the things that they cover are:

2. Decluttering before selling
3. Necessary repairs before selling
4. The staging process (show before and after pictures!)
5. The Listing Agreement
6. The overall process of selling a home

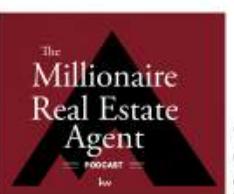
**Pro Tip:** Keep it interactive and invite everyone to have a dialogue. Use the chat when hosting digitally to connect with people and answer questions in real time.

## #2 Drive to the Workshops

You should be offering your workshop once per month. This allows you plenty of time to drive consumers to it.

1. Market your workshop daily
  2. Direct mail
  3. Runs ads in newspapers and magazines
  4. Post on social media, both paid and unpaid
  5. Add to your email signature!

2. Drive everyone to a sign-up form that provides them with the information (and Zoom link if applicable).  
Collect basic information: 



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## #3 Run the Workshop

Have fun, be relaxed, and keep it interactive! Invite everyone to discuss so they do not have to listen to a monologue. One of the key components is how you close out the workshop: 

*"Thank you all for joining us today! In the next day or two you will hear from one of my team members who will visit with you, create a plan, and set up an in-home consultation. We want to do this because today we spoke very generally about the selling process and when we meet in your home we will discuss specifics that apply only to you."*

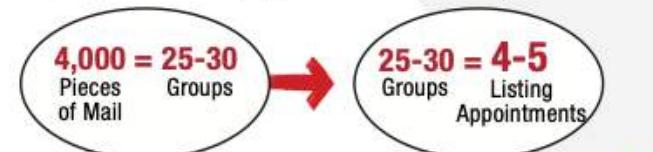
#### **#4 Follow Up**

If you can't set the appointment immediately, add them to your touch program in a TCPA-compliant way. Be sure to contact them the next day to see what questions they have from the workshop. Be in touch at least once per quarter until they are ready to meet. Workshops are a great way to set now and future business if you work your pipeline correctly.

**Pro Tip:** Use Command SmartPlans to automate your follow-up plan.

### ***Seller Seminar Conversion***

Sue and Scott find that it takes about 4,000 pieces of mail to get 25-30 groups signed up for a seminar. Of 25-30 groups, they expect 4-5 listing appointments set that night!



Want More? Listen in Here!

# Cash Offers



Heidi Fore built her business from the ground up. From solo agent to mega agent, then team leader to investor, Heidi now owns 62 investment properties - the first 50 she purchased in just 62 months!

## 1 Define Your Path with Math

For Heidi, financial freedom meant generating \$15,000 per month in passive income. She calculated that each rental unit in her desired investment area could generate \$300 in cash flow, making the math simple: She needed 50 units.

To create your own path, ask:

- Where are you now?
- Where do you want to be?
- What's your path to get there?
- What are the mile markers on your path between now and your goal?

There is no luck. To get great deals, secure financing, attract renters, and build a support network, you need to talk to a lot of people.

## 2 Have Enough Conversations

Heidi generated conversations by:

- Mail: She wrote postcards to owners whose properties matched her investment criteria. For Heidi, 1,400 postcards turned into 14 acquired units!
- Networking: Investor meetups, real estate agents, neighborhood events, etc.
- Social Media & Online

Pro Tip: Heidi references The BRRRR Method of financing - listen to David Greene in MREA Episode 52!



## 3 Track Numbers and Follow Systems

Track everything from income to expenses and implement systems that streamline operations.

Heidi recommends:

- A place for rental income and bookkeeping
- Google Forms for paperwork
- Google Voice for communication

Continue refining your process until your goal is reached! Whether that's acquiring more properties or optimizing your portfolio, the key is to stay intentional and adaptable.

## 4 Reflect, Revise, and Repeat



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# Farming

## Dominate Your Farm In Three Years

From Jim Fagan, Charlotte, NC

It doesn't have to take a decade to create a thriving geographic farm and Jim has the math to prove it.

2021

0% Market Share - \$0 in GCI

2022

10% Market Share - \$227,000 in GCI

2023

50% Market Share - \$480,000 in GCI

Jim uses several tactics to farm his preferred geographic area:

### 1. Snail Mail



Each month Jim sends out a real estate focused postcard and at least one Just Listed or Just Sold card. He sends the largest and highest quality postcards. They stand out when someone opens a full mailbox!

### 2. Boots On The Ground



Jim either shows, or previews, any home that comes on the market in his farm area. He believes that if you are going to be the real estate expert, then you have to be knowledgeable about the prior closed sales and that means seeing every one of them.

### 3. Social Media



If your farm area has a Facebook group, join it and stay very active. Jim believes that one of the best ways to show value in the group is to offer vendor recommendations when someone is asking. **PRO TIP:** If there is no HOA or they do not have a Facebook page, this is the perfect time to start one for the community and mail postcards that drive to that group!

### 4. Open Houses



Open houses may be the best way to connect in person with people who live in the farm area. If you do not have listings in the farm area to hold open, ask every agent who gets a listing if you can hold it open for them!

### 5. Join The Club



One of the reasons that Jim chose his specific farm area was because it had a country club. He is visible at the country club and is there several times a week to workout, play golf, dine, or just say hello. He is very purposeful about talking with neighbors when he sees them there and is always quick to strike up a discussion about real estate.

**PRO TIP:** Get to the [Red Label Store](#) and buy one of the "Ask Me About Real Estate" shirts or hats and wear them all the time! We have heard story after story of agents who built their businesses doing just that one thing. That's why we brought them back!

### 6. Throw Parties



Jim's HOA has a rule precluding door to door solicitation, so to meet more people in the farm he started hosting neighborhood events. These events have become his secret sauce and most profitable touch. They host 4 events per year with 1-2 of those being giveaways. The other 3 are plug and play where the only things that change are the theme and the food. They include a DJ, beer/wine, and a bounce house or large water slide for the kids. Jim said that "We've discovered that the kids' activities are key. If the kids are entertained, then the parents will stay and socialize." Jim lives in the farm and he hosts the events are in his front yard to further anchor himself to his neighbors and make the parties very visible. They mail invitations with handwritten addresses, colored envelopes, post on the HOA Facebook group, and call all their Mts in the farm to personally invite them.

**PRO TIP:** Try raffling off three restaurant gift cards as "door prizes" to collect names, physical addresses, contact information, and an "opt-in" to allow you to contact all the guests in a TCPA compliant and friendly way. Then call all of them and thank them for joining you!

### 7. Everyone Loves a Pie



For Thanksgiving, Jim personally delivers hundreds of pecan pies made by a well-known Charlotte baker; they are amazing!

### 8. Help Them Be First



Whenever Jim has an upcoming listing in the farm he always gives current homeowners within the farm the chance to refer a buyer before it hits the MLS. Everyone likes the chance to pick their new community member!

# Social Media

## Make Connections Through Social Media

From Shawn Cleary, Charleston, SC

Shawn Cleary is a social media niche master. His system has generated over \$250K in GCI in his first two years as a real estate agent! Shawn uses Facebook as his platform of choice and connects with people who share a common occupation, history, or hobby.

### STEP 1: Define Your Niche

With this system, you start by choosing which niche you are going to focus on. Example: Shawn is most active as an administrator in two Facebook groups, both involving the United States Navy (we thank Shawn for his mission and service!). His fastest growing group is the Navy Nuke Property Network, which is composed of former and current Navy Nuclear Operators.

### STEP 2: Be a Property Network

Shawn purposefully names the group "XXXXX Property Network". He wants to clearly delineate that the focus of his group is real estate. Why be a secret agent and pretend the group is about anything else?

### STEP 3: Invite Other Agents

Shawn invites other Navy Nuclear Operators who have become real estate agents to join the group and invite their databases to be members. This is how the group grows and becomes a thriving national property network with member-driven real estate posts. The key here is that the other agents are not in your market area.

**PRO TIP:** To get buy-in from other agents, make them moderators of the group. If someone posts "looking for a realtor in XYZ market", moderators can be the first to comment on that post because they're the gatekeepers of the content.

### STEP 4: Be Helpful and Interact

When members ask questions, be there to provide answers, education, and consulting to one and all.

**PRO TIP:** "Friend" as many people as possible who join. That way, they are not just interacting with your Facebook group, but interacting with you personally and seeing the content you post.

### STEP 5: DM and Refer

Use the DM feature to speak to members who have real estate questions in your market and send and receive referrals with other agents in the group.

**PRO TIP:** Do not allow people to join or post without a moderator's approval. This is important because Shawn says their lone membership question is: "How are you affiliated with the nuclear navy?". The response here directs/determines how to DM them. Many times, they respond that they are moving to XYZ market, which is a great entry point for conversation.

# Golden Letters

## Simple Golden Letters

From Will Van Wickler, Falmouth, ME

Will consistently does 30-plus deals a year using his simple Golden Letter approach. The trick to his success is identifying an audience and targeting that specifically. At first, Will targeted resale properties. Now he is finding the same success targeting owners of second homes.

He breaks it down into four easy steps:

### 1 Pick Your Mailing Area

Selecting the area in which you will be sending your Golden Letters is the first step.

Will focuses on geographic areas that fall into all three of the following buckets:

1. An area he enjoys traveling to each day to take and service listings that also has interested buyers.
2. An area with an average sales price that works in his business model.
3. An area with an above average turnover rate for his marketplace.

You can use your MLS and local title company to obtain all the data you will need to analyze and pick your area.

**PRO TIP:** Will often takes luxury listings from Golden Letters, so you shouldn't discount the effectiveness of this model based on sales price. Areas with high concentrations of second homes, expired listings, and high equity-to-debt ratios or pre-foreclosures have a higher response rate.

### 2 Set Up Your System

The call-to-action in your letter asks the homeowner to call you. You can expect that when your letters begin arriving, your phone will start ringing!

1. Select a voicemail system that transcribes the voicemails and emails them to you. You can use a platform like SlyDial to send consumers straight to voicemail.

2. This message should be a regular greeting and not mention the letter.

*"Hi, you've reached the voicemail of Will Van Wickler with Keller Williams [Market Center]. I am sorry I have missed your call. I check my voicemail periodically throughout the day and look forward to connecting with you soon. Please leave your name, number, and a brief message and I will call you back shortly. Thanks again for calling and have a great day."*

Before Will returns any phone calls, he uses the MLS and tax records to do some research on the home in question and cross references his database to see which buyer in his system the specific home may be perfect for.

**PRO TIP:** Will set this system up so that when he makes his first hire, an ISA or VA could easily obtain these messages, do the research, and even make the contact for him.

### 3 Send Your Letter

The key to this entire system is to keep it simple. Will uses 8.5 x11-inch white paper and black text. Example:



Will's Conversion

300 Letters = 6 Listing Conversations  
6 Listing Conversations = 1 Signed Listing

### 4 Be Responsive

Remember, everything that you have done up to this point is designed to make the phone ring! Make sure you return all calls within a timely manner.

*"Hey Jason, This is Will Van Wickler with Keller Williams [Market Center]. Thanks so much for giving me a call. I got your voicemail and understand you received my letter?"*  
(Allow them to respond.)

If they show interest, continue the conversation. If not, wish them well or ask for their email to add them to your database.

*"As you know, there simply aren't enough homes on the market. We're working with 12 different buyer families right now and can't seem to find what they're looking for. Instead of waiting for the perfect house to come up, we're actively reaching out to homeowners like yourself in areas where our clients want to be, to see who might be interested in having a conversation."*

*"So, I have to ask, if you sold your home, where would you go?"* (Allow them to respond.)

#### Set The Appointment

*"Great! I would love to come by and do some due diligence for the families we're working with. This way, we don't have to bring multiple people to your house. At the same time, I can give you a real-time market value that algorithms can't keep up with, so you can make the best decision for you and your family. Would 4 o'clock today or 5 o'clock tomorrow be better?"*

# Building a Business on a "Promise" with Kris

From Kris Bertagnolli

## Fundamental Belief

The muscle you build is the muscle that will build you.

## The Rule

"The Promise" we make is "The Promise" we keep.

# Promises

## The Promise



1. The entire business is built off "The Promise".
2. "The Promise" is everyone's promise and everything everyone does has to deliver on "The Promise".
3. "The Promise" sets clear expectations of the customer experience.

## The Marketing Plan



### 1. Top of Mind

1. Tattoo the community
2. You're everywhere
3. Impressions



Vehicle wraps

For sale signs

Radio/TV ads

Swag

### 2. ROI

1. Measurable
2. Sources
  1. Open house
  2. Radio/TV ads
  3. Social media video

1. Facebook
2. Instagram



TikTok



3. YouTube



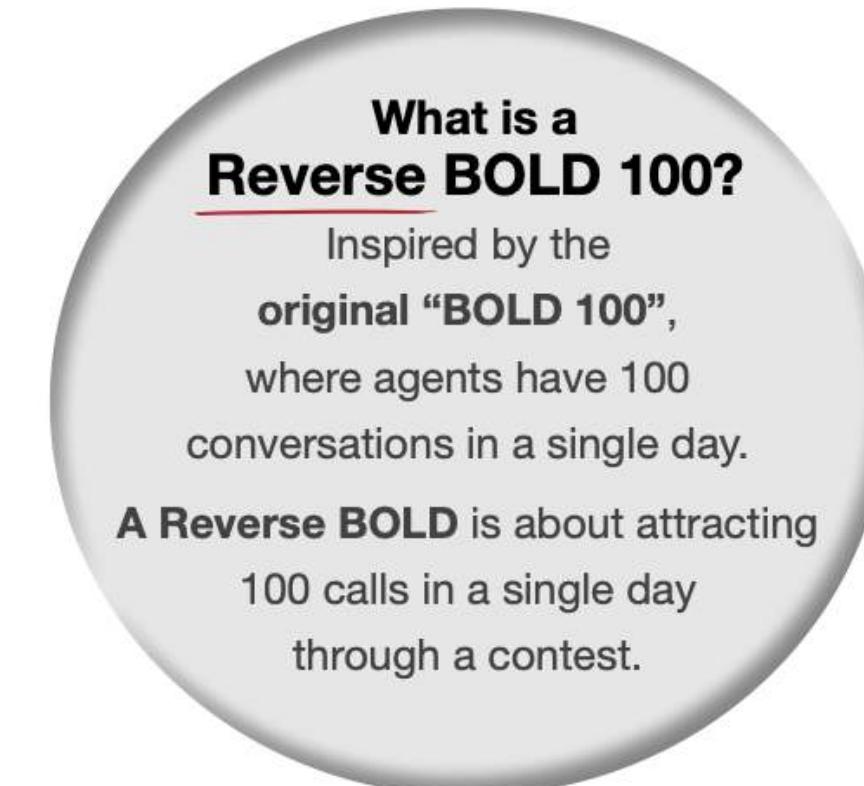
4. Focus

- 1. Properties
- 2. Information about area
- 3. Mike Market Moment

# Reverse BOLDs

## Zach's Guide to a Reverse BOLD 100

From Zach Castillo



# Niche Markets

## The Intersection of Real Estate and Divorce

From Bridget Potterton, San Diego, CA

Bridget Potterton started her career in real estate with no background in the industry and quickly went on to start her own brokerage. After a tough transaction, a client she thought she would never hear from again began sending her referrals... who happened to be an attorney helping people going through a divorce. She realized she could help these clients and become an expert in the divorce arena. Here's how she did it:

### 1. Get Educated

1. Start by educating yourself in both real estate and family law.
2. Obtain designations or certifications relevant to divorce real estate, such as becoming a Certified Divorce Real Estate Expert (CDRE).
3. Bridge the gap between real estate and family law by understanding how they intersect.

### 3. Build Relationships

1. Network with family law professionals through events, seminars, and networking groups.
2. Introduce yourself effectively by highlighting your expertise as a Certified Divorce Real Estate Expert and your focus on assisting clients in divorce-related real estate transactions.
3. Engage in one-on-one conversations with attorneys to build rapport and trust, emphasizing your ability to handle complex divorce real estate transactions with professionalism and sensitivity.

### 3. Provide Exceptional Service:

1. Prioritize client confidentiality and fair housing practices by refraining from disclosing divorce-related information to buyers or other agents.
2. Understand the unique needs and challenges of clients going through divorce, and provide tailored solutions and support throughout the real estate transaction process.
3. Elevate professionalism within the industry by continuously improving your knowledge and skills in divorce real estate transactions and advocating for ethical practices.

By following these steps, you can effectively navigate ANY niche market to propel your business forward.

# Mentality • Mastery • Momentum

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## MOMENTUM

**Momentum** is the *forward motion* created by *consistent action, energy, and focus*—the force that turns progress into sustained success.

- **Small wins** compounding into big results
- **Staying in motion** through challenges and change
- **Harnessing energy and teamwork** to keep moving forward
- **Building habits** that create continuous progress
- **Identify Patterns** both positive and negative through reviewing activities and results

## GOAL SETTING to the NOW

SOMEDAY GOAL



FIVE-YEAR GOAL



ONE-YEAR GOAL



MONTHLY GOAL



WEEKLY GOAL



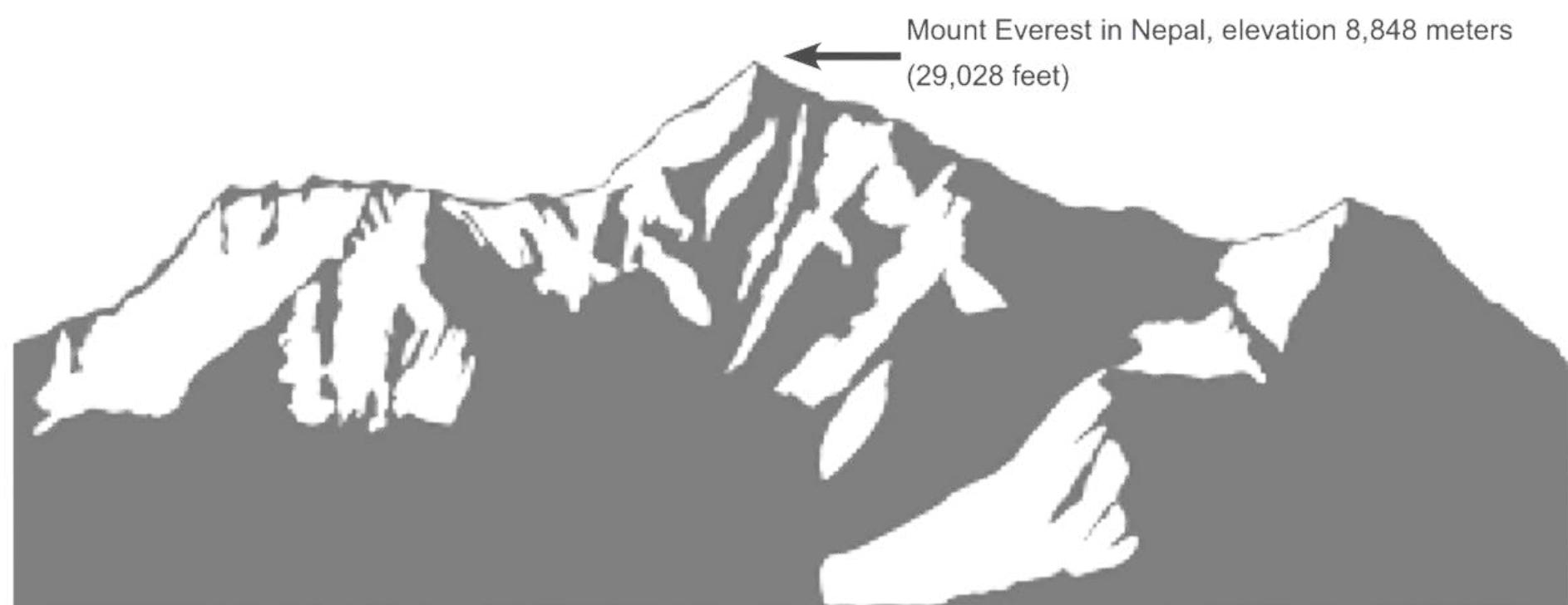
DAILY GOAL



RIGHT NOW

### 2. Think Big Goals and Big Models

Climbing a big mountain is a Big Goal. A Big Goal takes a big plan.



# Business Tracks

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Track 1

Track 2

Track 3



**BIG WHY**

# My Numbers

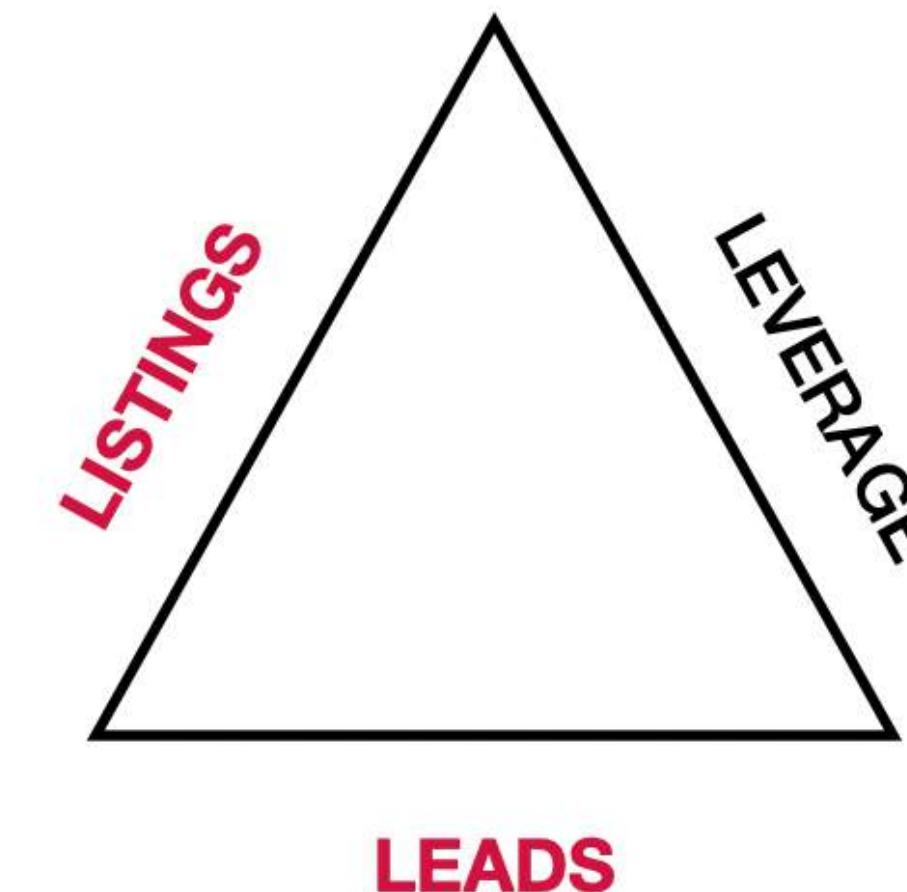
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1. The amount of money I need to pay for my lifestyle and get out of debt = \$\_\_\_\_\_
2. My business expenses annually (estimate) = \_\_\_\_\_
3. My average commission amount = \_\_\_\_\_
4. Number of listing appointments gone on last year = \_\_\_\_\_
5. Number of buyer appointments gone on last year = \_\_\_\_\_
6. Number of listings sold last year = \_\_\_\_\_
7. Number of buyers sold last year = \_\_\_\_\_
8. Number of names in my database = \_\_\_\_\_
9. My team consists of me +

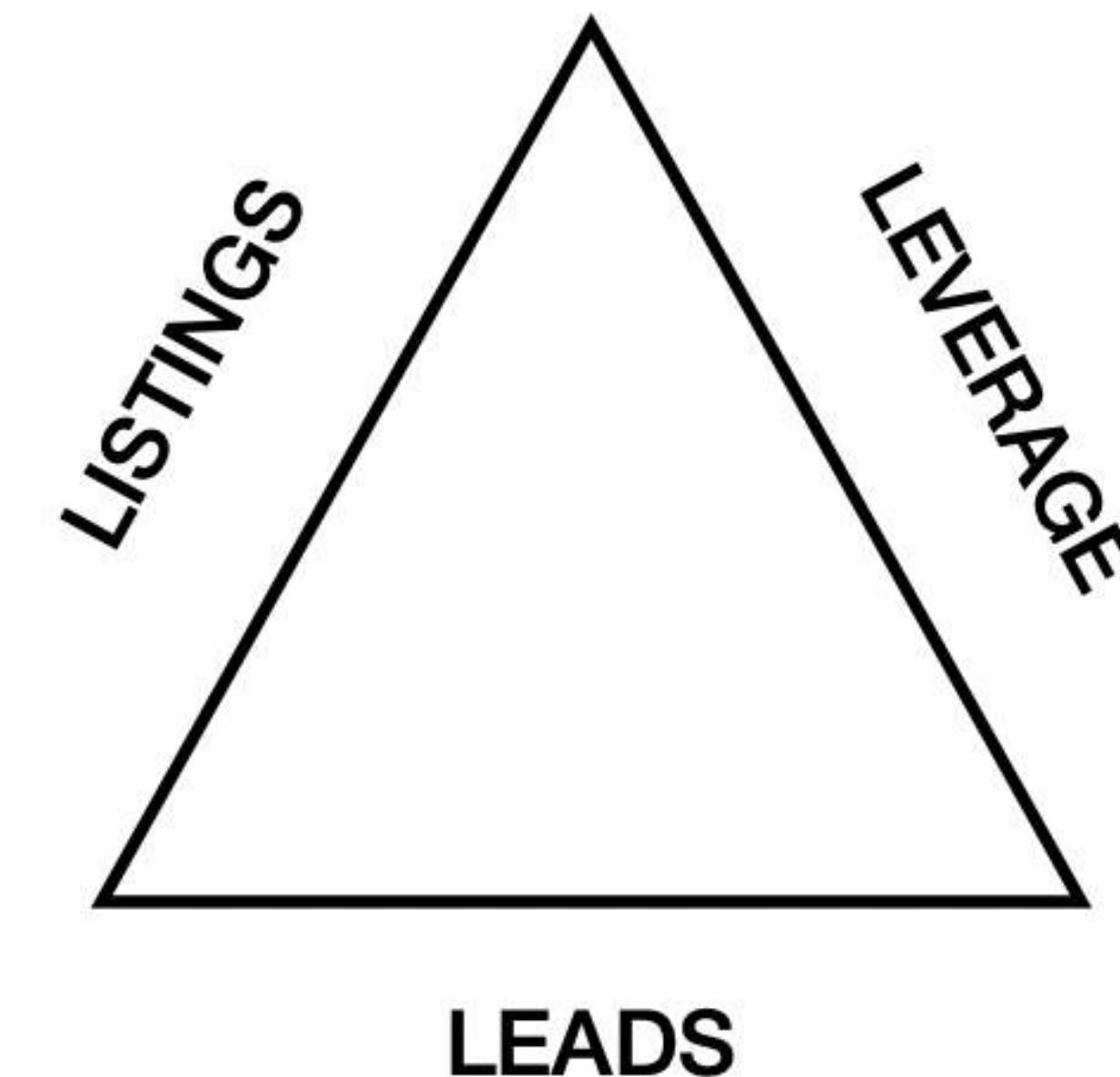
## *My Top Lead Sources*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

## *Leads and Listings*



### 3. THE FOUNDATIONAL MODEL OF MREA\*



\* *The Millionaire Real Estate Agent*, by Gary Keller, Dave Jenks, and Jay Papasan

# 5. FIVE FUNDAMENTAL MODELS—ONE SYSTEM

## 1. Economic Model

A formula that describes the relationship between a series of activities and the specific outcomes they produce. It shows you where your money comes from, where it goes, and **how much is left over** for you.

*To achieve the amount of **net income** you desire ...*

## 2. Lead Generation Model

A plan for **where your money comes from**—from your lead generation activities. It is a companion to the Economic Model since leads are the fuel to the economic engine of your business.

*You will need to generate **X number of leads**, ...*

### 3. Budget Model

A plan for **where your money goes** between the time you receive it and keep it for yourself. The focus is on minimizing your expenses to maximize your profit.

*Spend X amount of money in specific areas to support these efforts, ...*

### 4. Organizational Model

A plan for **hiring help** and talent as your business grows to help you grow your business.

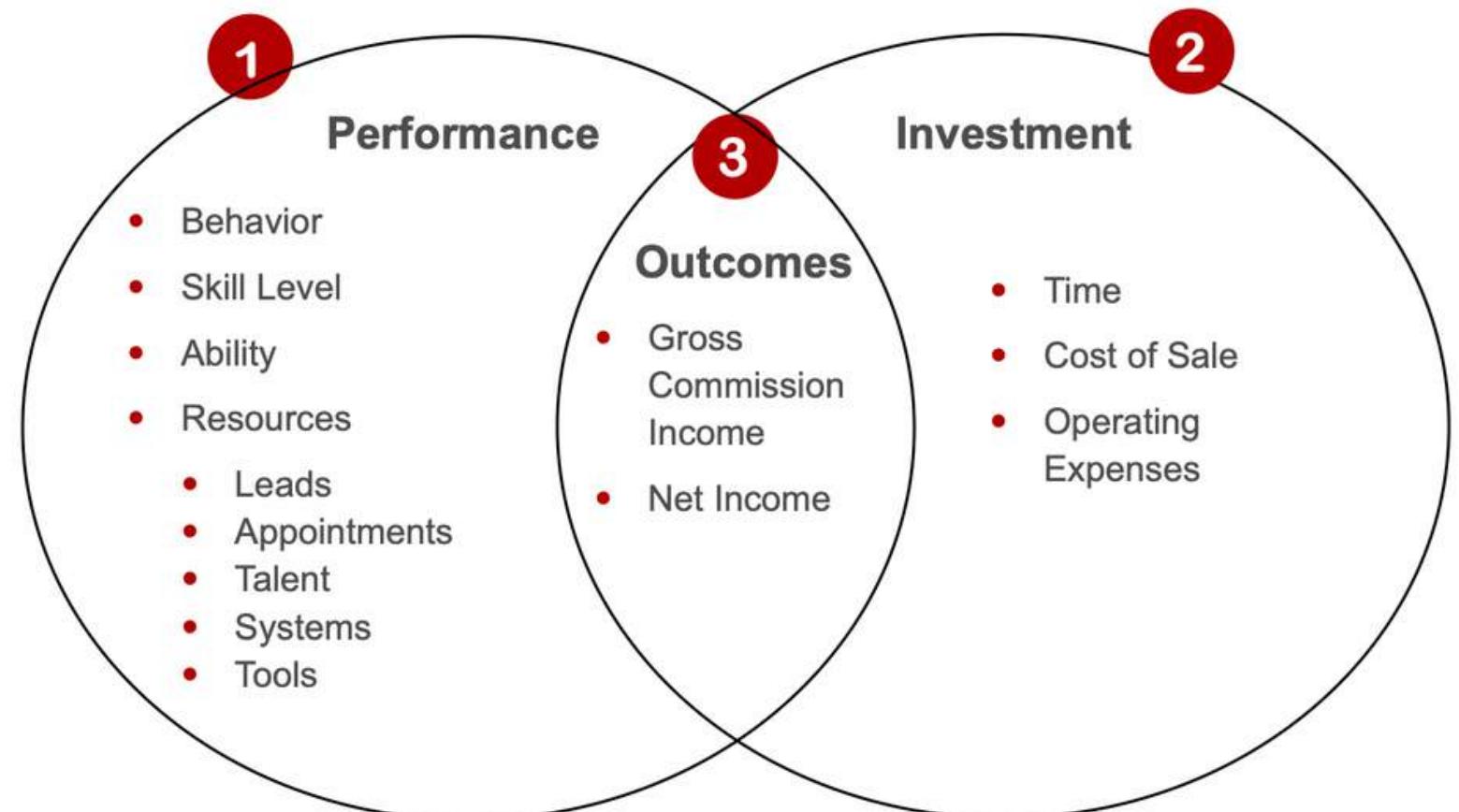
*Hire X number of people to service it all, and ...*

### 5. Expansion Model

A plan to apply your systematized business model in additional locations. (This model will not be covered in this course. For more information, attend the Keller Williams University (KWU) course, Expansion System Orientation.)

*Apply your systematized business model in additional locations.*

## 1. PERFORMANCE / INVESTMENT / OUTCOMES



**Performance + Investment = Outcomes**

1. **Performance** is how well you apply your skills, behavior, ability, and resources to produce revenue.
2. **Investment** is the time you spend on lead generation and conversion, along with the expenses related to both.
3. **Outcomes** are the prize—the result of your performance and investments—your GCI and Net Income or Profit.

## 2. ELEMENTS OF THE ECONOMIC MODEL

**30 / 30 / 40**

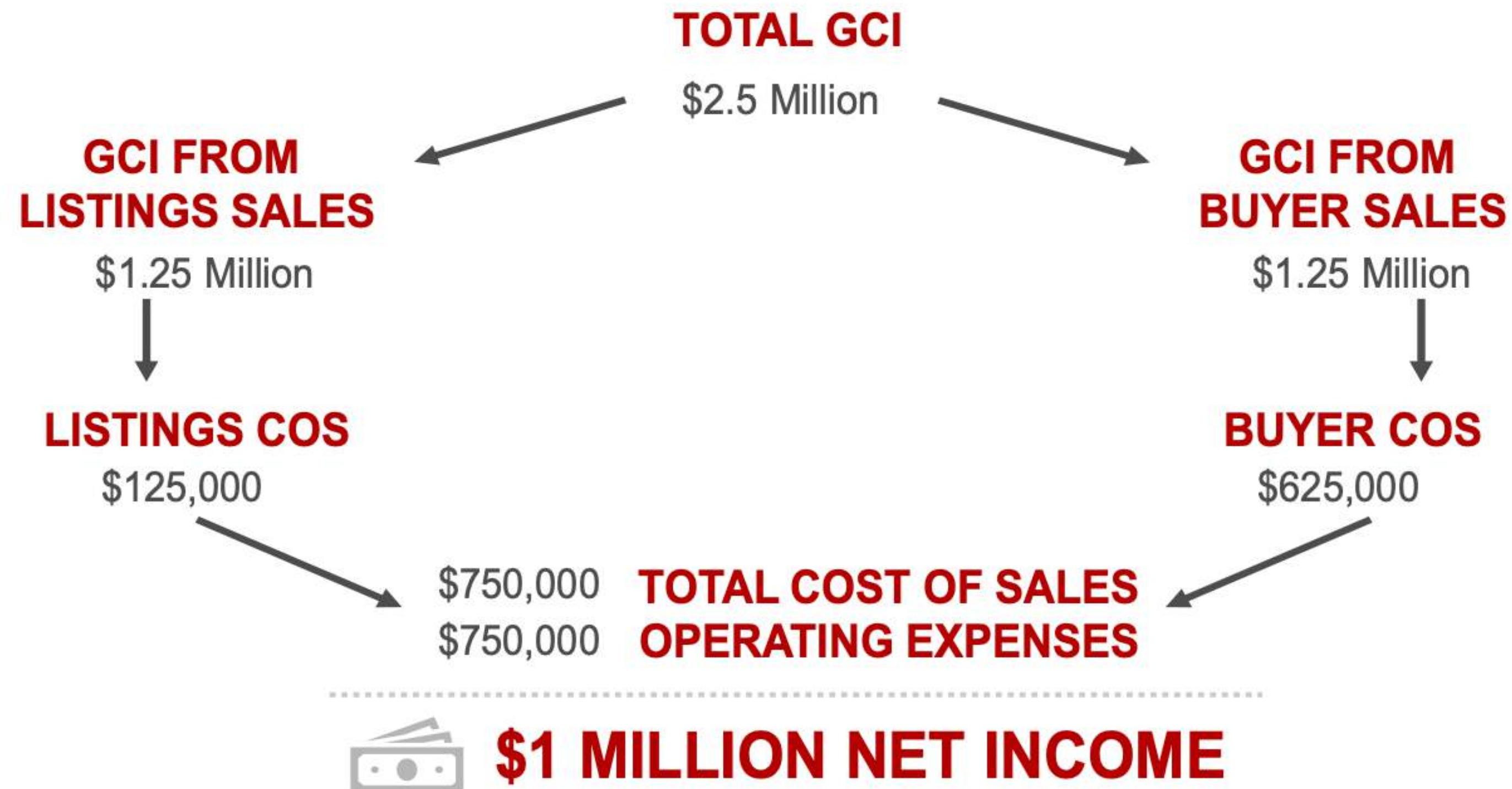
Focus on Gross Commission Income

- Total GCI (100%)
- Operating Expenses (30%)
- Cost of Sales (30%)
- = Net Income (40%)

Focus on Net Income / Profit

- Net Income (40%)
- + Operating Expenses (30%)
- + Cost of Sales (30%)
- = Total GCI (100%)

### 3. CASH FLOW



## 4. THREE DRIVERS OF THE ECONOMIC MODEL

1. **Leads to Appointments** - Generating leads and converting into Buyer and Seller appointments.
2. **Appointments to Signed Agreements** - Using appointments to secure clients with a signed service agreement.
3. **Agreements to Closed Transactions** - Serving clients and facilitating a closed transaction.

## 9. MY BUSINESS PLAN - ECONOMIC MODEL (ACTUAL)

1. Begin by writing your Net Income goal.
2. Divide Net Income by 40% (.4) to calculate total GCI, and write this number down.
3. Multiply GCI by 30% (.3) for both Operating Expenses and Cost of Sale and write these down.
4. Write in your Average Commission Amount (refer to page 1.1).
5. Divide total GCI by your Average Commission Amount to calculate the number of units to be sold.
6. Calculate the rest of the formulas.
  - If you do not know your split between the Sell Side and the Buy Side, use an estimate or use the MREA example of 50/50.
  - Use estimates or MREA examples for each of the conversion rates.
7. Calculate how many appointments to go on monthly and weekly.



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# GPS PLAN

## Goal

### Priority 1

#### Strategies

Add five strategies to achieve the first priority. Each strategy is a specific, actionable item.

- € Strategy 1 to achieve Priority 1 ...
- € Strategy 2 to achieve Priority 1 ...
- € Strategy 3 to achieve Priority 1 ...
- € Strategy 4 to achieve Priority 1 ...
- € Strategy 5 to achieve Priority 1 ...

### Priority 2

#### Strategies

Add five strategies to achieve the first priority. Each strategy is a specific, actionable item.

- € Strategy 1 to achieve Priority 2 ...
- € Strategy 2 to achieve Priority 2 ...
- € Strategy 3 to achieve Priority 2 ...
- € Strategy 4 to achieve Priority 2 ...
- € Strategy 5 to achieve Priority 2 ...

## 5. Think Action and Accountability

Once you have a plan, execute your plan!

- Take action; get into activities.
- Hold yourself accountable to staying focused and on task.

Individuals with **written goals** are **42.1%** more likely to achieve them.

Individuals with **accountability** are **77.6%** more likely to achieve them.\*



# Mentality • Mastery • Momentum



Happiness is when what you think,  
what you say, and what you do are  
in harmony.

— *Mahatma Gandhi* —