



# New Agent

## Guidebook



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## Welcome to your new career!

Real estate is truly an amazing industry and can help you reach the financial goals of your dreams, if you put in the work.

The first few months after you pass your licensing test are crucial to your success. We hope you found a great company or team to join, but now the real work starts. You are now an entrepreneur and the owner of your own “startup.”

We created this guidebook to give you actionable steps to achieve success in your first few months and beyond. Follow the suggestions and step outside your comfort zone. Let's dive in!

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## You are the business

Real estate school may have given you the knowledge to be an effective student of the profession, but now the real learning begins. You need to develop effective habits and systems early in your career in order to keep clients coming to you on a steady basis for years to come.

***As a new agent, you're the CEO, president,  
and owner of a startup business...***

a business with zero clients. Your brokerage may provide training, mentoring, and an office during your first few years, but your company can't build your business for you. It will not write your business plan. It will not develop your work habits. It will not give you clients. Your success is solely up to you.

Eighty percent of all small businesses fail during their first three years. Interestingly enough, around eighty percent of all new real estate agents do not renew their licenses after their first three years. Coincidence? Probably not. Don't be part of the 80 percent! This is the best profession in the world if you do it right. Use this guidebook as a roadmap for the first 60 days of the rest of your career and get “You, LLC” off the ground.

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## Running a business isn't free.

Hopefully someone has told you along the way that it's not cheap to get started in the real estate business. There are some unavoidable fixed costs that are necessary before you can get up and running. On top of that, you still have to pay your personal expenses, and since commissions won't be rolling in on Day 1, a good rule of thumb is to have at least six months of living expenses in the bank. To estimate your start-up and monthly costs, use the charts to the right. If you're not sure how to estimate some of these costs, get help from a friend, mentor, or managing broker. Below are a few of the expenses you can expect.

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E&O Insurance	<input type="text"/>
City Application	<input type="text"/>
State Application	<input type="text"/>
National Board Application	<input type="text"/>
Board Annual Dues	<input type="text"/>
MLS Application fee	<input type="text"/>
MLS Month 1	<input type="text"/>
Office Fees	<input type="text"/>
Business Cards	<input type="text"/>
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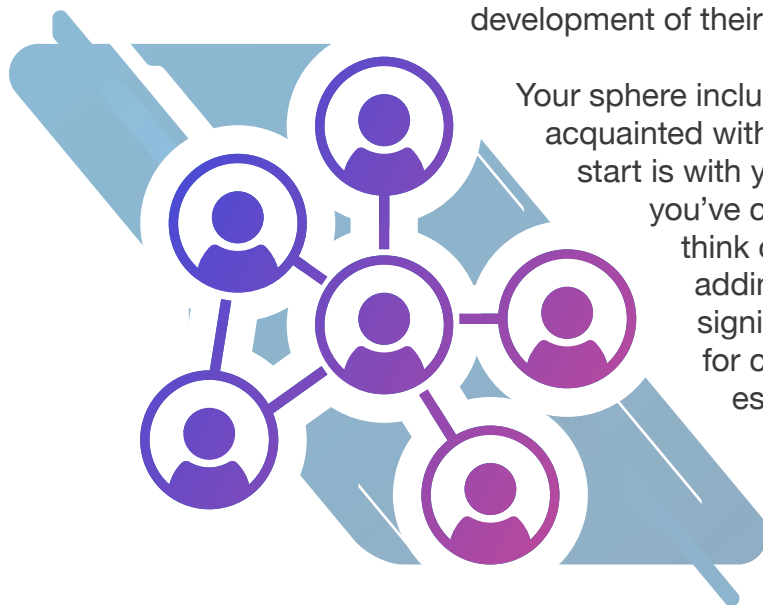
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## Build your network. Get organized.

### The Sphere of Influence

One of the most important exercises for a new agent is laying down the foundation for your sphere of influence. This is the group of people you will be contacting with email campaigns or personal messages and the degree to which they respond will determine the level of success in your career. There are many agents who don't make it past the first three years because of poor management or development of their sphere of influence.



Your sphere includes anyone you know or are acquainted with in your life. The best place to start is with your family and friends. After you've compiled all the people you can think of in one place, you can keep adding to your list by asking your significant other or a family member for contacts that would be open to real estate advice. Don't forget to check your cell phone's contact list. You will be amazed by how many people you have in your phone that aren't included in your sphere of influence database.

### Create Your Database

Preparing and organizing your database is the most important action a new real estate agent can do. This database of contacts becomes your living, breathing, real estate business for years to come. Do not be hasty here. Put everyone you can think of into this database. You should even include people who don't live in the particular geographic area you are practicing in. Don't forget to double-check that you've added everyone you know by comparing your list with your friends and followers on your social media profiles.

For a complete database of contacts, it's important to have a name, address, email, and phone number for each person. If you are missing something, this is the time to reach out! Here are some examples of how to ask for contact information:

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## Build your network. Get organized. cont.

*"Hi John, it's (Your Name). Long time no talk! I'm updating my contacts for my real estate business and I wanted to make sure I had your information correct. I think I may have an old address, so would you mind giving me your current address?"*

*"Hey John, it's (Your Name). I hope everything is going well! I was hoping to get some information from you to add to my database of contacts for my real estate business. Would you mind confirming your email address for me?"*

If you feel comfortable, try this, "Oh, if you don't mind could I get your birthday?" And if they are married, ask for their anniversary. These key dates are awesome reasons to reach out and make contact.

It's as easy as that. This is a good way to make contact, but be prepared to discuss the real estate market and your services during these conversations because someone may be thinking about buying or selling. Work on this like your business depends on it. Set aside an entire week just to work on this. If it takes you forty hours, great. If it takes you two weeks, even better. The success of your real estate business depends on a comprehensive database of people you know, may know, did know, kind of know... you get the picture. Once you have your list of contacts completed, you're ready for the next step.

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## Manage Your Database

No, you cannot use Facebook or your phone contact list as a long-term solution for managing your contacts. You need a Customer Relationship Management (CRM). A CRM is a way to organize, categorize, and keep track of everyone you know. You can make contact through this system and record conversation notes, action items, and other tasks associated with each person.

When choosing a CRM, the most important criterion is ease of use. There are several CRMs on the market, so do some research and find one you feel comfortable with.

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## Build your network. Get organized. cont.

Some common CRMs include Lion Desk, Follow Up Boss, Realvolve, Firepoint, Real Geeks, Boomtown, CINC, and many more. Purchasing a CRM can be an investment, but it will be one of the best investments you make for your new business.

It's very easy to get overwhelmed when searching for a CRM as each software has its own features and benefits. Focus on finding one that fits your budget, goals, and needs as a new real estate professional. Consider the following:

- ☑ *What does it cost?*
- ☑ *Is it easy to organize my contact database?*
- ☑ *Can I categorize my list of contacts?*
- ☑ *Does it have notes and tasking features?*
- ☑ *Are there email capabilities?*

These are some of the most important features. The rest of the bells and whistles may be used later on, but aren't essential for you as a new real estate professional. After making an informed choice, take the time to learn the system. One of the biggest mistakes real estate professionals make is not learning about the technology they purchase. Once you have subscribed to a CRM, take the training webinars, watch the videos, and call customer support if you have any questions. If it takes you another forty hours to learn the new technology like the back of your hand, that's great. You will be ahead of the game and will be able to leverage the technology to build your business.

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From here, take the contact list you created in the previous step and load it into your new CRM. It's important to remember that the best CRM is the one that gets used. Don't spend too much money or overanalyze each CRM's offerings as a basic program can get the process started for you.

Your CRM will be your home base of operations. Every time you meet someone new or hear of someone who may need to buy or sell a home, you will add them to your CRM. As your sphere of influence, and in turn your CRM, grows, so will your business.

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## Don't be afraid to ask for help.

It's never fun reinventing the wheel, so don't! Speak to your broker or find an experienced agent in your office who is willing to be your mentor over the next several months. Keep in mind that a good mentor is likely to be busy with his or her own work, so make a structured plan that is respectful of their time to ask important questions and learn how they are doing business.

*A great mentor is someone willing to share how he or she became successful and impart their experience and wisdom on you.*

Work with them to learn business development and lead generation techniques. Don't be shy to ask what they did as a new agent to get their first clients, how they obtain clients now, what marketing strategies they deploy, and how much they spend on those tactics. Your mentor should also be enlisted to teach you the technical skills of real estate, such as contract writing, negotiations, and more.

Shadowing your mentor is a great way to learn the ropes. Ask him or her if you can attend an open house with them. During this time, learn how your mentor marketed the event and observe what they do and say during it. You can also ask to attend a closing or listing presentation. Although they will be your guide, don't expect your mentor to hold your hand through the entire process. You have to take initiative and be proactive in seeking guidance. Mentors aren't mind readers. Take some time to make a list of possible mentors in your network and jot them down below, along with their contact information.

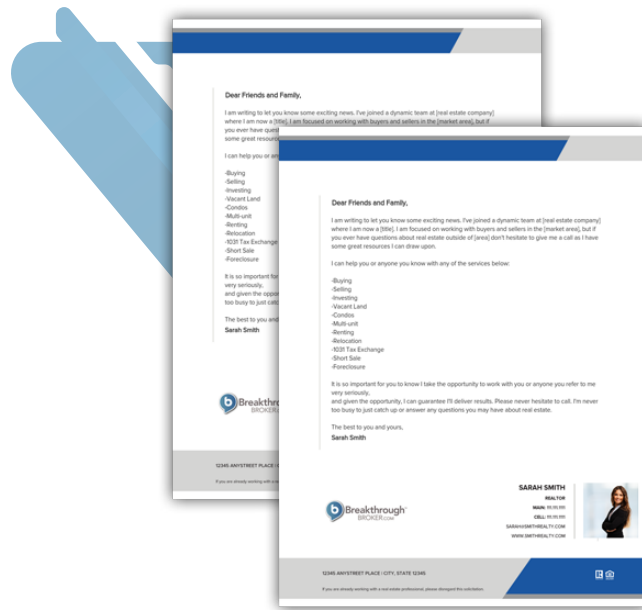
Name

Contact Info




## Tell everybody. Then tell them again.

It's time to let the world know that you're a real estate agent! Craft a letter that you can mail or email — or perhaps both — to your sphere of influence. This letter will be the announcement letting people around you know that you've started a new career and you're building a client list. Make this letter personal and don't be afraid to ask for referrals. Be sure to tell them how to send business your way and be specific by including your phone number, email address, company name, address, and license number. If you have writer's block and need some help, try sending our pre-written [New Agent Letter](#)! We make the process super easy by printing, stamping, and mailing your letter once you complete it.



When you send this letter to your sphere, it's recommended to include a business card or refrigerator magnet in the envelope. You can get blank refrigerator magnets at most office supply stores. Peel off

the paper and stick your business card to it, and there you have it, a refrigerator magnet that the people in your sphere will see every day.

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If this process seems a little old school, it is. As a new real estate professional, you must find ways to remind your sphere that you are now an agent. Creating top of mind awareness is one of the biggest challenges of your new career. Sending your sphere a letter that explains your new venture in real estate will help start this process. You're not done yet, by the way. This can't be the only message you send out. Be sure to track who responds to your announcement letter. Send out another letter one month later thanking everyone for the positive feedback and letting them know how business is going.



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## Tell everybody. Then tell them again. cont.

These follow up steps tend to be hard for new real estate professionals. Many new agents say things like, “I don’t want to bother people,” and ask, “How often should I communicate with my sphere?” A major mistake some new real estate agents make is to under communicate.

*Although, there is no definitive answer as to how much you should contact your sphere of influence, you should err on the side of overcommunication.*

It takes repetitive engagement to create a connection in their mind that you are now their go-to real estate professional. Assuming that one letter, one conversation, or a single Facebook post is going to attract a steady stream of potential clients is a big mistake.

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## Don’t just wing it.

### Create a Business Plan

It’s prudent to have a plan. Your business plan is your roadmap to success. It’ll guide you over the next year and help you measure your progress. Coming up with a business plan can be difficult for new agents due to some of the unknowns of the business, so have your mentor, broker, or a trusted agent in your new office help you. You can also try the [Breakthrough Success Plan](#), which will help you create a business plan step by step.

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### Create a Marketing Plan

How are you going to get business? What lines are you going to put in the water to find buyers and sellers? How are you going to make money? These questions are important to your survival over the next three years and you can answer them by creating a **marketing plan**. Again, for a new agent you may need some guidance from a mentor, broker, or trusted agent in your new office or give [Breakthrough Broker’s Marketing Action Plan a try](#).

## Become an expert.

### Keep Up with the News

You may not immediately be able to walk the walk, but you can learn how to talk the talk. One of the best things a new agent can do is read, read, and read some more. You should read everything you can get your hands on — local business and real estate news, national real estate news, blogs, Realtor board news, etc. Read everything.

There are various publications that can help you stay up to date on the real estate market, such as the following:

- ☑ [\*Inman News\*](#)
- ☑ [\*RIS Media\*](#)
- ☑ [\*Realty Times\*](#)
- ☑ [\*HousingWire\*](#)
- ☑ [\*Keeping Current Matters\*](#)
- ☑ [\*Forbes - Real Estate\*](#)
- ☑ [\*NAR - News\*](#)

If you are serious about learning the market, you can use [Feedly](#) to compile any real estate-related articles from multiple publications on one feed. You can also join Facebook groups for real estate agents, such as [Next Level Agents](#) and [Lab Coat Agents](#). Pay attention to the language used in these groups and try to understand what works for successful agents.

Picking up a few good books that will give you insight into the real estate industry can also help you get up to speed. Here are a few recommendations:

- ☑ [\*The Millionaire Real Estate Agent by Gary Keller\*](#)
- ☑ [\*Shift: How Top Real Estate Agents Tackle Tough Times by Gary Keller\*](#)
- ☑ [\*21 Things I Wish My Broker Had Told Me by Frank Cook\*](#)
- ☑ [\*How To Master The Art Of Selling by Tom Hopkins\*](#)
- ☑ [\*Sell With Soul: Creating An Extraordinary Career In Real Estate by Jennifer Allen\*](#)

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## Become an expert.

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One of the barriers to success for new agents is they're not sure what to talk about with prospective clients, who will invariably ask, "How is the market?" By reading current events, listening to industry podcasts, reading helpful books, and understanding what is going on in real estate in your region, you can answer these questions intelligently. You'll also pick up the industry jargon, which will make you sound like an expert when used in the right situations.

### Get Involved in the Industry

Engagement and involvement are imperative to a quick start. The more active you are and the more people you speak with in the real estate business, the more success you'll have. Attend any real estate-related event you can over the next 60 days. Some events you should be attending include:

- ✓ *Company meetings*
- ✓ *Broker open houses*
- ✓ *Trainings*
- ✓ *Board of Realtors meetings*
- ✓ *Title company events*
- ✓ *Affiliate events*
- ✓ *Parties*
- ✓ *Networking events*
- ✓ *Charity events*
- ✓ *HOA meetings*

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Activity begets success. Engaging with other people in the business will give you growing confidence and knowledge. In turn, that will show when you're speaking with new or prospective clients. Plus, you never know when or where you'll run into a new lead that you can capitalize on.

### Get to Know Your Affiliate Partners

Affiliate partners are people in your area who are involved in the real estate industry in a support role. These people come from many different industries, however, those in the title insurance, mortgage services, and home warranty business will likely be the ones you have the most interaction with during real estate transactions.

## Become an expert.

cont.

As a new agent, you may not know people in these industries yet. Ask your mentor, broker, or a trusted agent in your office for several referrals, then set up appointments to meet them. Mortgage loan officers and title professionals (in some states, title attorneys) often derive a portion of their business from real estate agents who refer their clients to them. Because of this, these professionals are generally interested in building relationships with local agents and can be great resources, especially in the early stages of your career.

Great mortgage and title professionals will be able to give you advice, introduce you to other influential industry leaders, keep you up to date on the latest market trends, and be a sounding board for your new career. They may also have technology through their company that can help you or host educational events and seminars. At very minimum, you will receive great industry insight with every conversation.

When you meet with them, ask questions and don't be afraid to tell them you're new. Many good affiliates will recognize a new agent's potential and will look to help you in any way they can. Some questions you can ask include:

- *If you were starting as a new real estate agent, what would you be focusing on right now?*
- *What technology have you seen other successful real estate agents use to help them succeed?*
- *Do you have any upcoming webinars or in-person events I can attend?*

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The conversation will flow from there! Focus on creating lasting relationships with several people in each of these industries and meet with them monthly. These alliances will both help you grow your business and be great contacts for your clients.\*

*\*Please note, you should not expect anything for free from these contacts. Mortgage and title professionals cannot give you anything of value at no cost as it is a violation of RESPA.*

## Become an expert.

cont.

### Practice Makes Perfect

To be an accomplished professional in any arena you have to practice. Professional athletes practice every day to be at the top. The more you practice and rehearse in your head or with fellow agents, friends, or family, the better you will be when the time comes to “perform.”

There are a variety of questions that could be asked of you by a client, prospect, or anyone in your sphere of influence. Practice your responses over and over in your head, or better yet, write them down. The following are some examples:

- *“How’s the market?”*
- *“I would love to sell my home, but I’m not sure what it’s worth. Could you help?”*
- *“Why would I use you as my agent? My neighbor is in real estate.”*
- *“How would you market my home?”*
- *“Can you tell me about your company?”*
- *“What are the interest rates right now?”*
- *“Is it better to rent or buy a home right now?”*
- *“I’m calling about the listing your company has on ABC Street. Can you tell me a little about it?”*

Let’s take a little deeper look at each of these questions to give you some ideas for talking points. Take some of these ideas, make them your own, and practice, practice, practice!

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**Question:** *“How’s the real estate market?”*

**Response:** *“It’s pretty crazy right now! I was speaking with my broker and she was telling me that one of the company’s listings was put on the market on a Thursday, received 21 offers by Friday afternoon, and was under contract for \$79,000 over asking price by Friday at 5pm. I am hearing these stories at every office meeting! For homeowners, right now is a great time to sell as the market is near it’s top end as we are seeing some signs of it cooling off. For buyers, interest rates are still at an all time low making it more affordable to buy a home, the big challenge is the lack of homes available to buy.”*

## Become an expert.

cont.

A response like this will help you stand out from your competition and you will sound like a veteran real estate professional.

*Question: "I am renting, but I have recently thought of buying a home. What do you think I should do?"*

*Response: "In some cases, renting a home can be a great option, but in most, homeownership affords so many advantages over renting. It is one of the best ways to build wealth. When you are renting, you are paying someone else's mortgage. That person is building equity in their home and planning for their retirement thanks to you. As a buyer, interest rates are very low right now, which gives you more buying power. Essentially, you can spend more towards your home and this wouldn't be the case if rates were higher."*

*Question: "Why would I use you as my real estate agent?"*

*Response: "Whether you're buying or selling, real estate transactions can be quite stressful and there is a lot at stake. It's not just about the money. You also want a successful outcome. I think working with someone you trust is really important. My promise to my clients is I will do everything I can to promote their interests, reduce the stress throughout the process, and even try to have some fun along the way."*

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These are just a few questions being asked by people thinking about making a real estate-related decision right now. Ask your mentor or broker what hot topics or issues are happening in your area. Practice your unique answers to these questions over and over in your head. As you role play these situations, don't short yourself. In order to answer these questions effectively and look like an expert, you have to answer each question a hundred times.

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## Become an expert. cont.

### Never Stop Learning

By now you should have a mentor and be reading everything you can get your hands on, but don't stop there. Seek out educational opportunities as often as you can to learn more about all facets of the profession. Your confidence level will rise with each class taken. Seek out a wide variety of classes. Fill in the following table with upcoming educational events you will attend for the next 60 days.

Date	Time	Class Name

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## Take action to grow your business.

### Develop Your Social Strategy

You should develop a strong social media strategy to implement in the budding stages of your real estate career. A great way to start is to create and share a [Self-Promotional post](#) to your social media profiles to notify your sphere of your new venture. You should also share personal experiences of your new job, such as setting up for an open house on your [Instagram Reels or Stories](#). And of course, don't hesitate to share [new listings](#) or [sold properties](#) because this will establish yourself as a real estate agent and possibly bring you business.



## Take action to grow your business. cont.

Follow popular real estate professionals on Instagram and Facebook to see what they are posting and how they are engaging their followers. Find strategies you like and emulate them. Lastly, you should establish yourself as a thought leader for your sphere by sharing relevant, useful real estate information with your followers. These posts can range from describing new trends in the real estate market to new housing developments in your neighborhood. Find great articles on the following websites:

- ✓ [Inman News](#)
- ✓ [RIS Media](#)
- ✓ [Realty Times](#)
- ✓ [HousingWire](#)
- ✓ [Keeping Current Matters](#)
- ✓ [Forbes - Real Estate](#)
- ✓ [NAR - News](#)

## Social Tips & Ideas

Social media is a very important part of any agent's marketing strategy. Below you will find a few ways to use social media to your advantage and meet more potential clients.

1. As we discussed in the last section, [Feedly](#) this will enable you to create a real estate news feed for free. Connect the websites below to your account and you will have an endless amount of great content to post on your social media sites. If you post an article to social media, make sure to write a thoughtful explanation to include as a caption to show your expertise. Here's an example of a potential post and caption.

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**Article:** [Renters Face Sticker Shock](#)

**Caption:** *For any of my friends trying to decide between buying or renting, I thought this article may help with the decision. Rent is continuing to increase in most areas of the country, so it may be more affordable to buy right now. And, if you are thinking of possibly buying an investment property, this is good news!*

*Check this article out for more information and call me if you have any questions.*

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## Take action to grow your business.

cont.

2. If you are willing to invest a little money (\$107 for the year), Breakthrough Broker has engagement posts. These posts are great for you to show your sphere of influence on a consistent basis that you are now a Realtor!
3. If you are interested in learning how social media can help you capture the attention of more buyers and sellers, check out this webinar on how to generate more leads on Instagram. We interviewed one of the foremost experts in the real estate industry to learn her top social media strategies.

At the end of the day, having an active presence on your social media platforms is an excellent way to stay in front of your sphere of influence. There are dozens of webinars, videos, and books that can help you position yourself successfully on your social platforms. Here are a few more resources you can find on Breakthrough Broker to help you create a strong brand and boost engagement on social media:

- ☑ [\*On-Demand Webinar: What to Post on Social Media\*](#)
- ☑ [\*On-Demand Webinar: Generate More Leads Through Instagram\*](#)
- ☑ [\*Engagement Social Posts\*](#)

However, a word of caution for any new real estate agent. Networking on social media can only take you so far. In the end, real estate is an industry founded upon relationships so you have to form and foster valuable connections in the real world as well, and use social media to support those.

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### Host Open Houses

It can be difficult to build momentum for your business during the first year. Oftentimes, new real estate professionals get wrapped up in the learning process.

- *How does a contract work?*
- *How do I schedule a showing?*
- *How do I submit an offer?*
- *What can I say to the other agent during negotiations?*
- *When do I get the buyer's agreement signed?*

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## Take action to grow your business. cont.

These questions are some of the unknowns that tend to paralyze a new real estate professional when it comes to actually finding people who want to buy and sell homes. We have found that one of the best ways to build your real estate confidence and to find your first few buyers is to host open houses.

When you host an open house, you come directly in contact with people who are looking to buy a home at some point. Some of these people are not currently working with a Realtor, so if you can create rapport and build trust, you just might become their Realtor.

Talk with your broker/owner or managing broker to see what agents in your office may be willing to have you host an open house for them. If you are going to do open houses, do them right.

### Market Your Open House

How are people finding out about your open house?

- *Social Media Advertising on Facebook and Instagram*
- *MLS Listing*
- *Zillow, Realtor.com, etc.*
- *Signage to Drive Traffic to Your Event*

Preparation:

- **Know the listing.** *Make sure you speak with the listing agent to learn as much as you can prior to the open house.*
- **Know other listings in the area.** *Run a search for similar homes within a three mile radius. If that particular listing is not for the open house attendee, offering other options for them in the area will make you stand out.*
- **Find recently sold homes in the area.** *This will give you a conversation topic and help you build trust.*

Need some helpful resources to help you promote your open house and host a professional event? [Check out the Open House section on Breakthrough Broker.](#)

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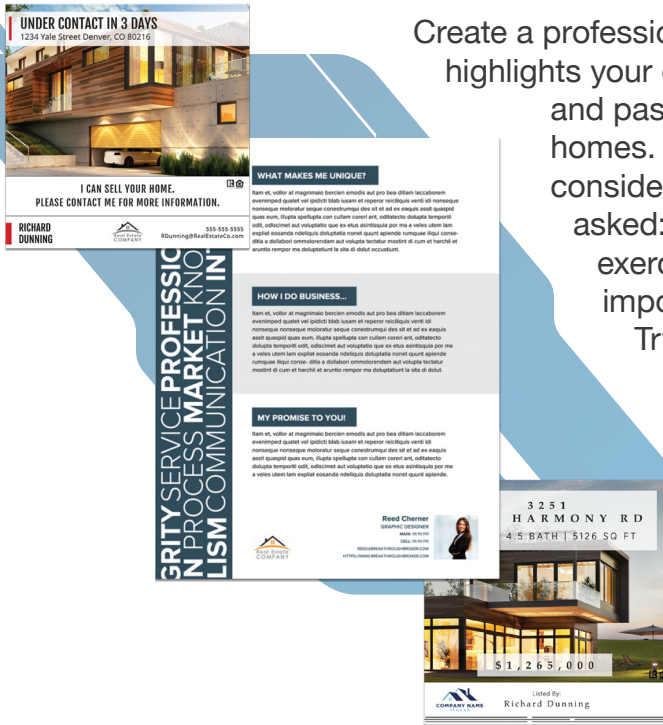
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**Take action  
to grow your  
business.  
cont.**

## Work on Your Business

Here are a few more ideas to engage your sphere of influence and connect with new people who may be looking to buy or sell. Click the links below or search for them on [BreakthroughBroker.com](https://BreakthroughBroker.com) to learn more about these resources.

### Self-Promotional Brochure



Create a professional self-promotional brochure that highlights your experience, real estate knowledge, and passion for helping people buy and sell homes. As you are creating this brochure, consider how you would answer if someone asked: “Why should I work with you?”. The exercise of answering this question is as important as using the final brochure.

To define why someone should hire you for the largest financial transaction of their life. Draw on experience from your past professional life prior to real estate or your personality traits that make you great at your job. Many agents were teachers, nurses, salespeople, and more before transitioning to real estate. They all have amazing expertise from their past life, which makes

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them all great Realtors. You are not a rookie at life, just real estate, so use that to demonstrate why you're the best for the job.

### Proof of Production Social Media Posts

Ask your broker or manager to give you three recent sales and any stand-out information about the sale, such as sold \$10,000 over asking price or on the market for 3 days. Then customize and share one of these posts on your social media channels. By sharing these posts, you tell a story about the state of the local market and pique the interest of homeowners who may be interested in selling.

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## Take action to grow your business. cont.

### Engagement Social Media Posts

Customize and share these real estate-related social media posts to your Facebook and Instagram accounts in rotation with listing promotion, testimonials, and more. They will act as a reminder that you are your sphere's newest go-to agent.

### Self-Promotion Social Posts

Customize these social media posts with your headshot, company logo, and contact information. Then share them on Facebook or Instagram or text them to yourself and send via direct message or text to people in your sphere to let them know you are here to help them with their real estate needs.

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## Good luck!

If you were to interview 100 highly successful agents, you'd find that they are wildly different people with different backgrounds, different levels of education, and different approaches to the business. However, one thing you'd probably find in common among all of them is their passion for their business, their clients, and their community. Successful agents love what they do and it is magnetic. They attract clients and peers and their business benefits tremendously from that passion. Find that passion, complete each step in this handbook, and get your successful real estate career started.

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