



SUCCESS SUMMIT

2025

DAY 1 – AUGUST 26

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TOM FERRY

Get Ready to Leap Frog your
Competition!

WINNING STRATEGY
WINNING MINDSET



If you're giving the market
your **power**.

YOU'RE DEAD.



There's ***141 days***

left until Elite 26!



Summit Outcomes

1. Have fun, network, ideate!
2. Create clarity & conviction!
3. Make decisions (*cut's & adds*)
4. Crush the next 5 months!
5. Take back control!



Let's start with >>>

- Where we've been?
- Where we are?
- Where we're going?
- And how you're going to win it?



WHY ARE
YOU HERE?



**YOU'RE HERE TO
MAKE DECISIONS**



Decisions about the next 141 days +++

Decisions about
how **YOU** want the
business to be...

Decisions about
Marketing...

Decisions about
winning more
Referrals...

Decisions about
how to get more
Leverage...

Decisions about
**Remaining
Relevant** in the
midst of
disruption...

Decisions about
what **Skills** to
improve

Decisions that
generate and
**Sustain
Momentum!**



So, "How's the market?"
"Is the world falling apart?"
"Are home prices going
to plummet?"





We asked ourselves...



***"If we studied the last 5 decades.
The booms, busts and the droughts.
Could we identify any signals that
would help us *shift our perspective*
on where we are? And where
we're going?"***



KCM + TFI + CHAT/GROK/Perplexity

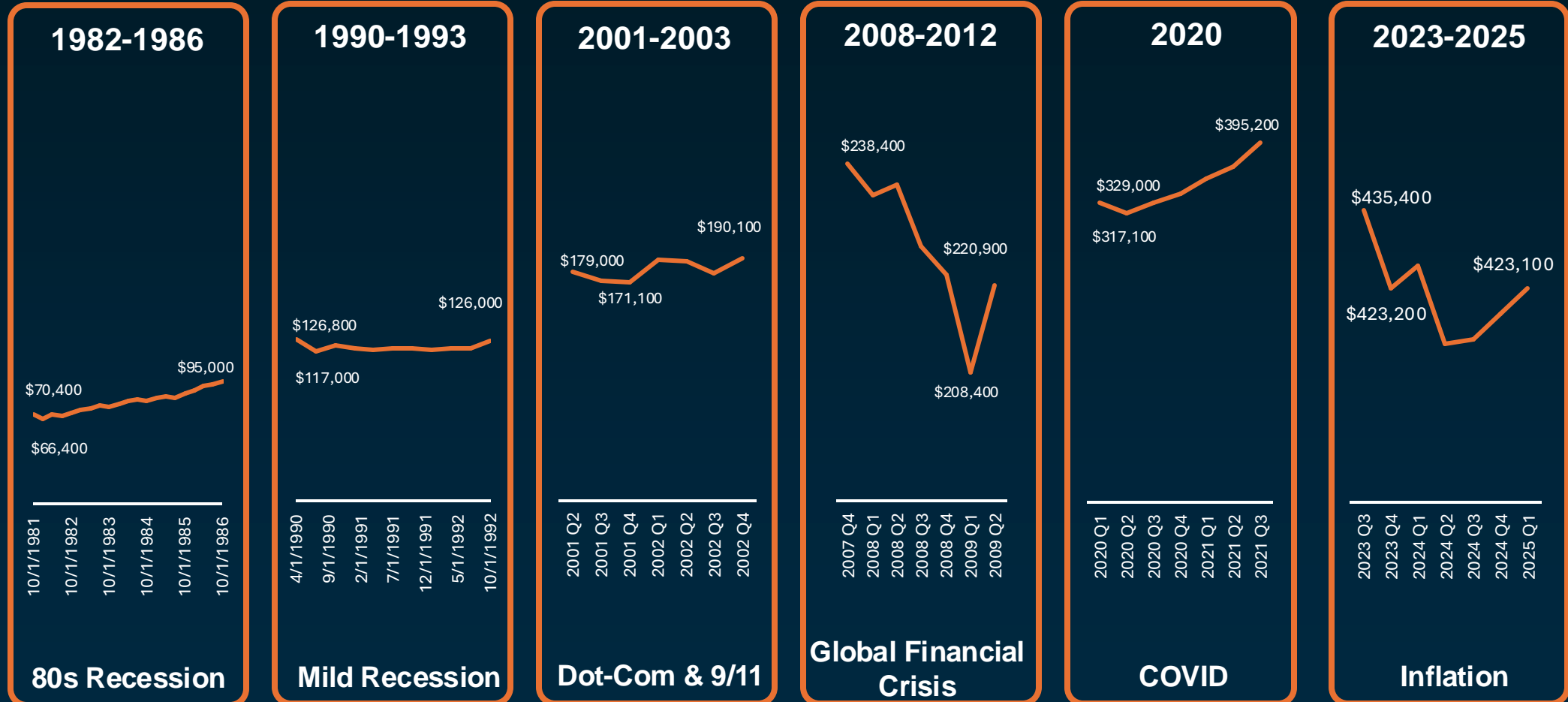
**We analyzed 5 decades
of HPA , HPD  & the droughts
to better predict “what’s next?”**

(5 obvious insights)

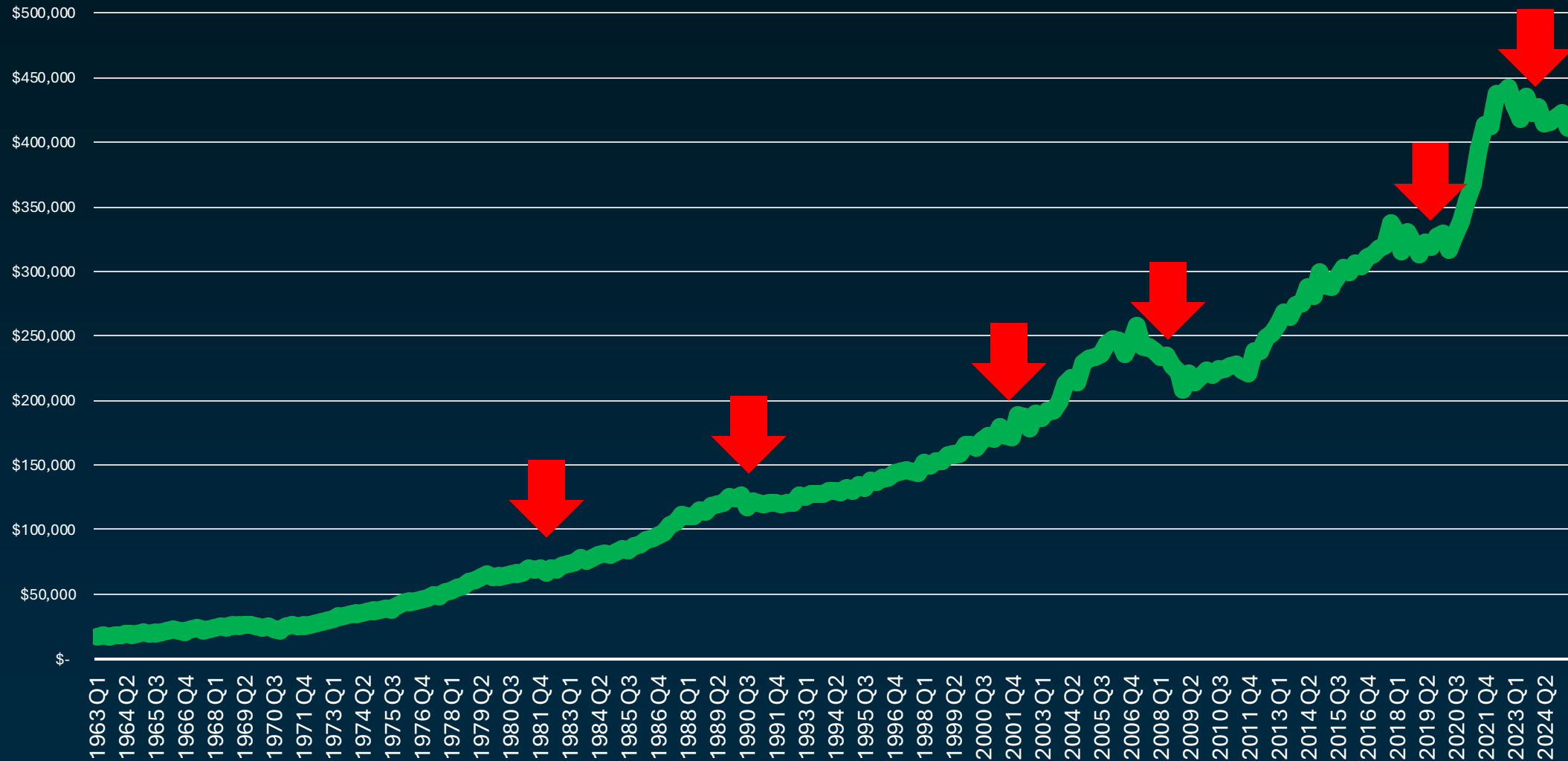


6 Times Home Prices Were Impacted

Since 1980s Till Now



6 Dips in Pricing Over The Last 50 Years



Here's what the study revealed >>>

- **Every drought ends in a recovery**  .



When Mortgage Rates Drop, Home Prices Tend to Rise – Even During Recessions

Period	Mortgage Rate Drop	Price Movement	Economic Backdrop
1982-1986	17.66% to 9.3%	\$70K to 95K	Post-Inflation Recession Recovery
1990-1993	10.67% to 6.74%	\$117 to 126K	Mild Recession Rebound
2001-2003	7.13% to 5.21%	\$171K to \$192K	Dot-Com & 9/11 Shock
2008-2012	6.46% to 3.34%	\$238K to \$251K	Great Financial Crisis
2020	3.28% to 2.67%	\$317K to \$338K)	COVID Pandemic Low Rates
2023-2024	7.79% to 6.61%	\$423K to 427K	Inflation Easing, Early Rate Cuts

30-Year Fixed Mortgage Rate

January 2020 - Today



We're 3 years into the mortgage industry's dual drought

This is the longest stretch in modern mortgage history where both sides of the business—purchase and refi—have been constrained.

(ResiClub PRO)




***“The Rates Take the Elevator
UP. And the Stairs Down.”***

Steve (the oracle) Harney ❤️

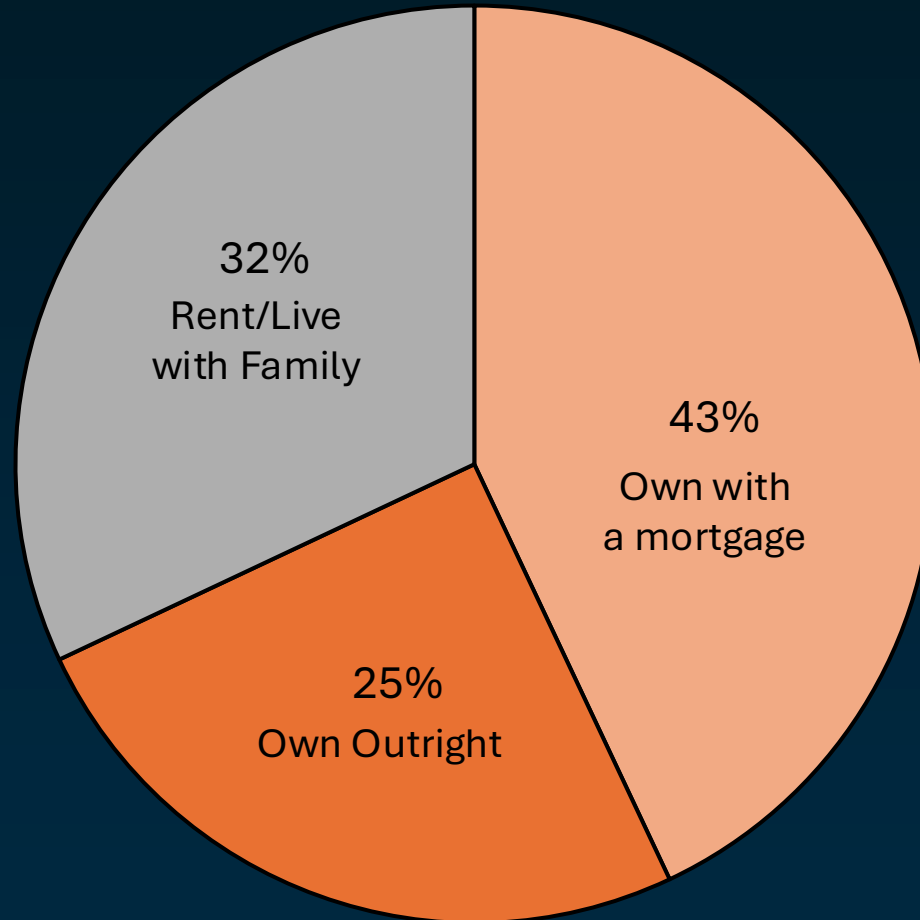


Here's what the study revealed >>>

- Every drought ends in a recovery .
- **Rates drive growth.**
-
-
-



Nearly 70% of Canadians Own a Home — 25% own it Outright, 43% Have a Mortgage



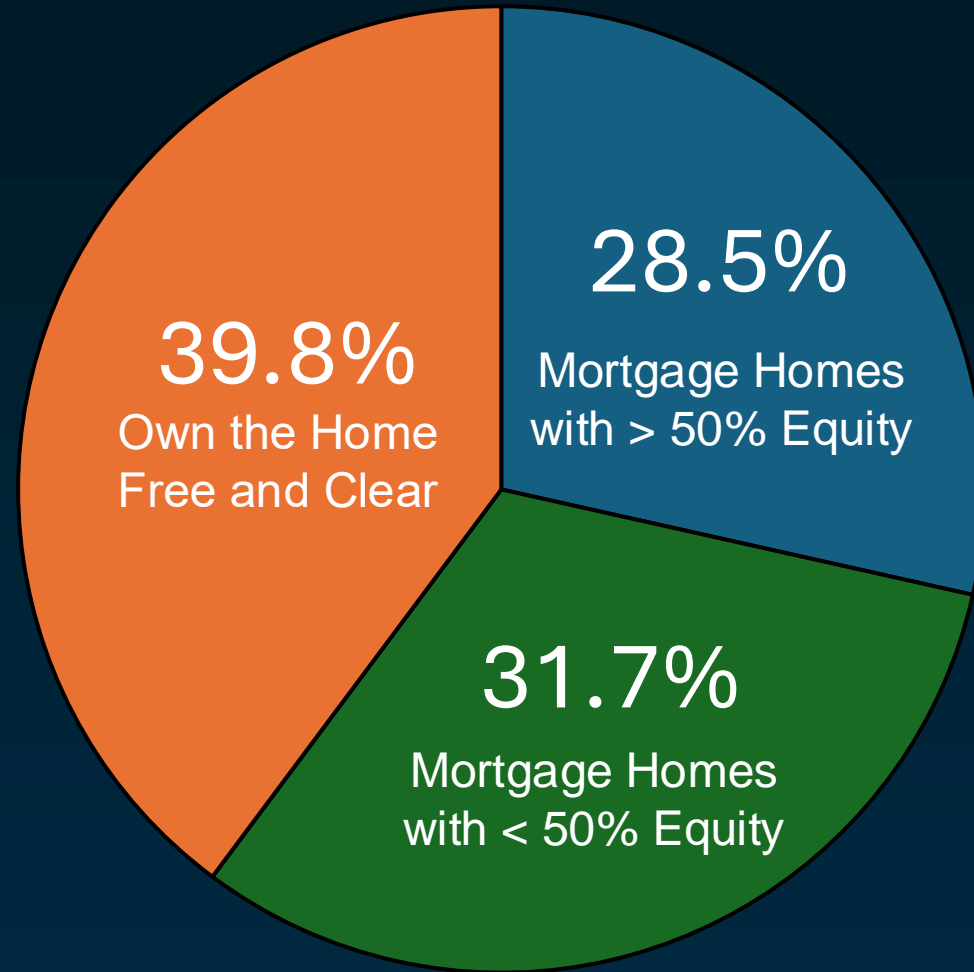


Canadians have significant equity in their home, averaging about **75%** of the home's value.

Canadian Bankers Association

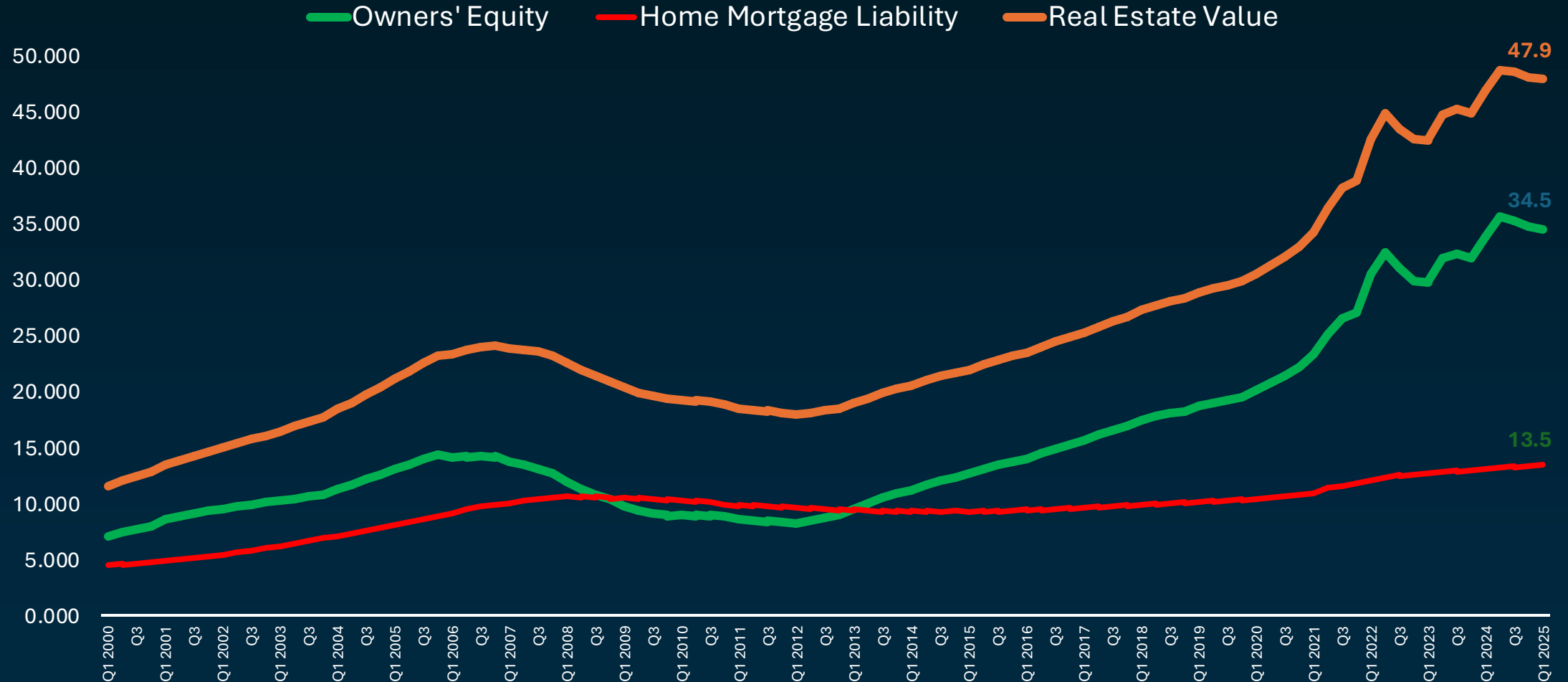
Americans Also Sitting on Tremendous Equity Today

Over 2/3 Have
Paid off Their
Mortgage or
Have at Least
50% Equity



Home Value, Equity, and Debt

In Trillions



What do we do with equity?

We put it to work.


Help our kid go to school.

Start a business.

Decide to up or downsize.



Here's what the study revealed >>>

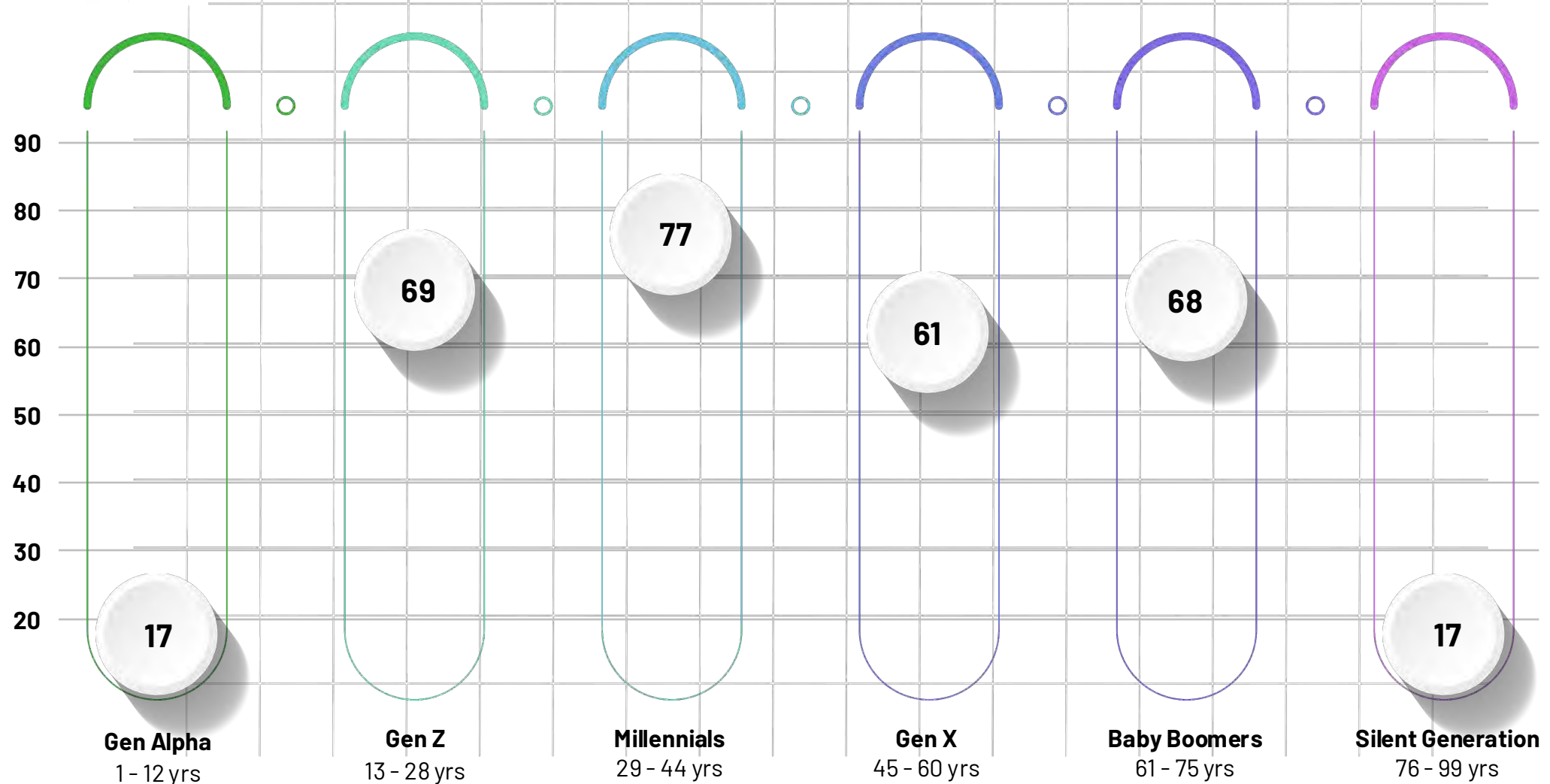
- Every downturn ends in a recovery .
- Rates drive growth.
- **Today's fundamentals are strong.**
-
-





WHOSE CIRCUMSTANCES ARE CHANGING?

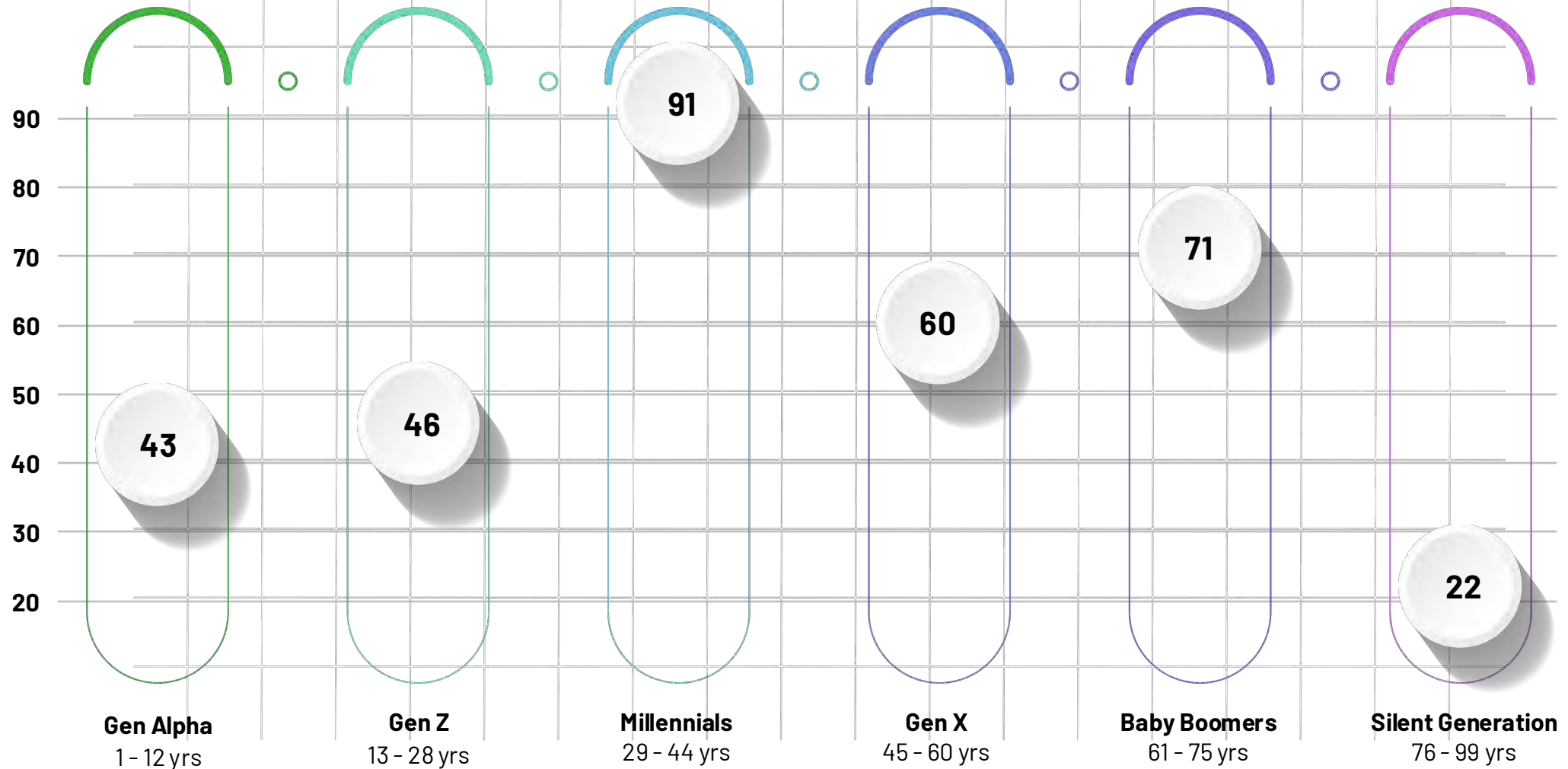
Generational Cohorts – At a glance – **Canada** Population (in millions)






WHOSE CIRCUMSTANCES ARE CHANGING?

Generational Cohorts - At a glance - **U.S.** Population (in millions)



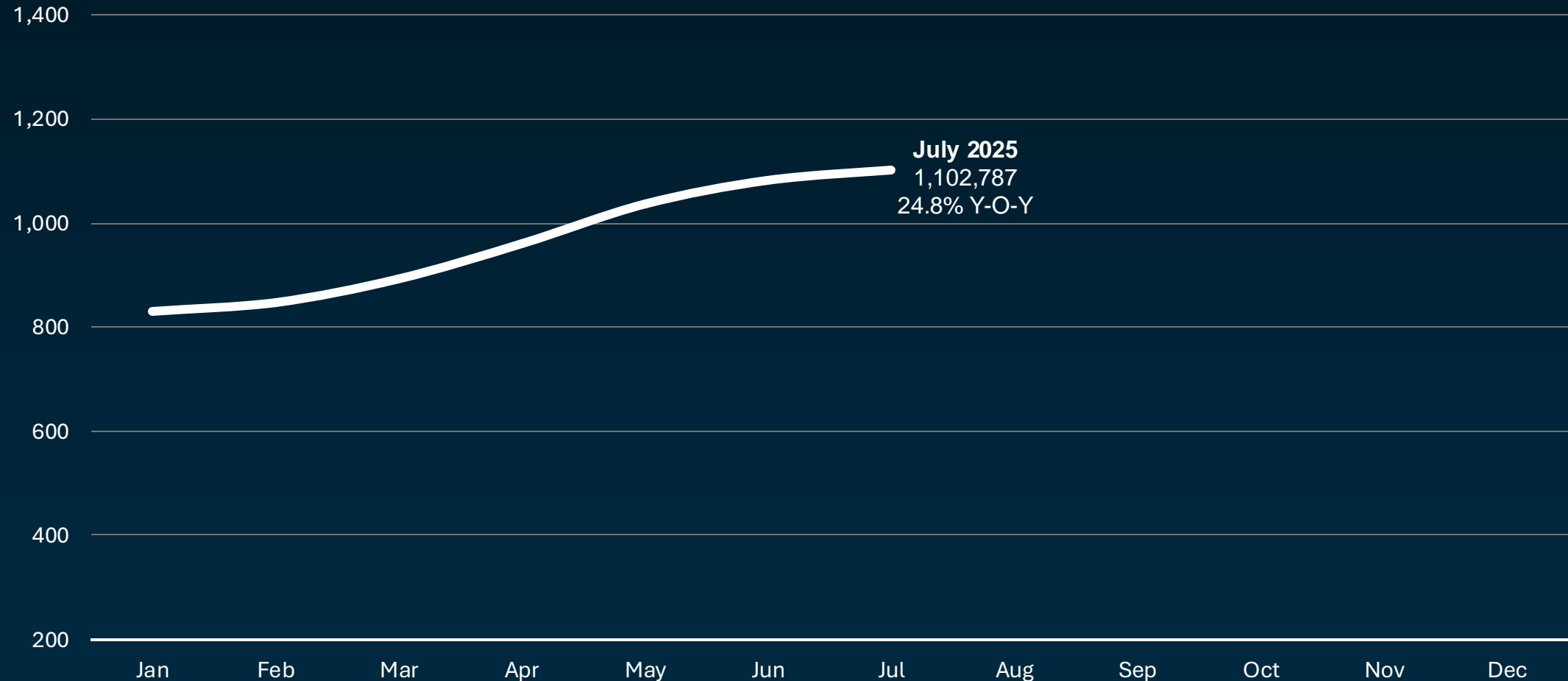
Here's what the study revealed >>>

- Every drought ends in a recovery .
- Rates drive growth.
- Today's fundamentals are strong.
- **Demographics on our side – 70% can transact!**
-



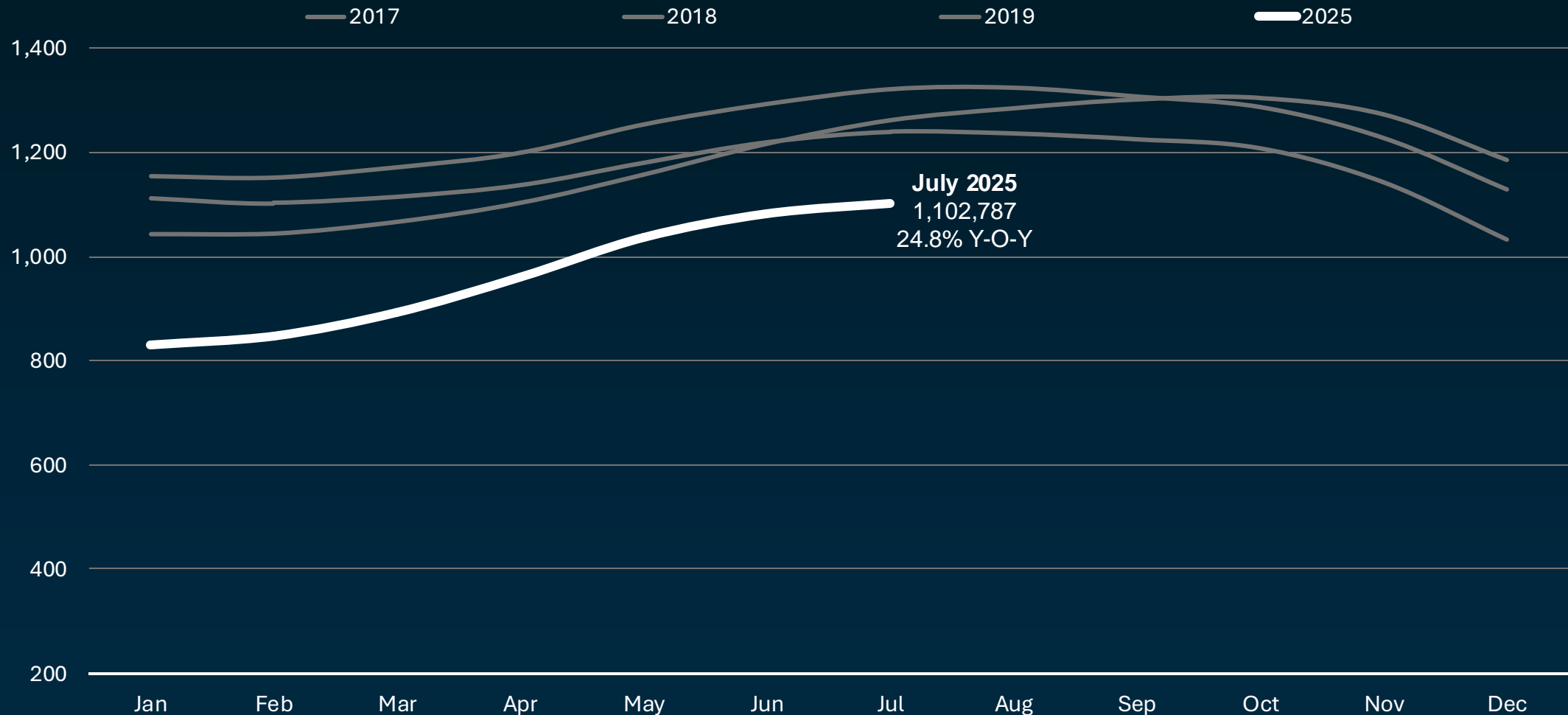
Inventory Topped 1 Million for the 3rd Consecutive Month

Active Monthly Listings Count, in Thousands



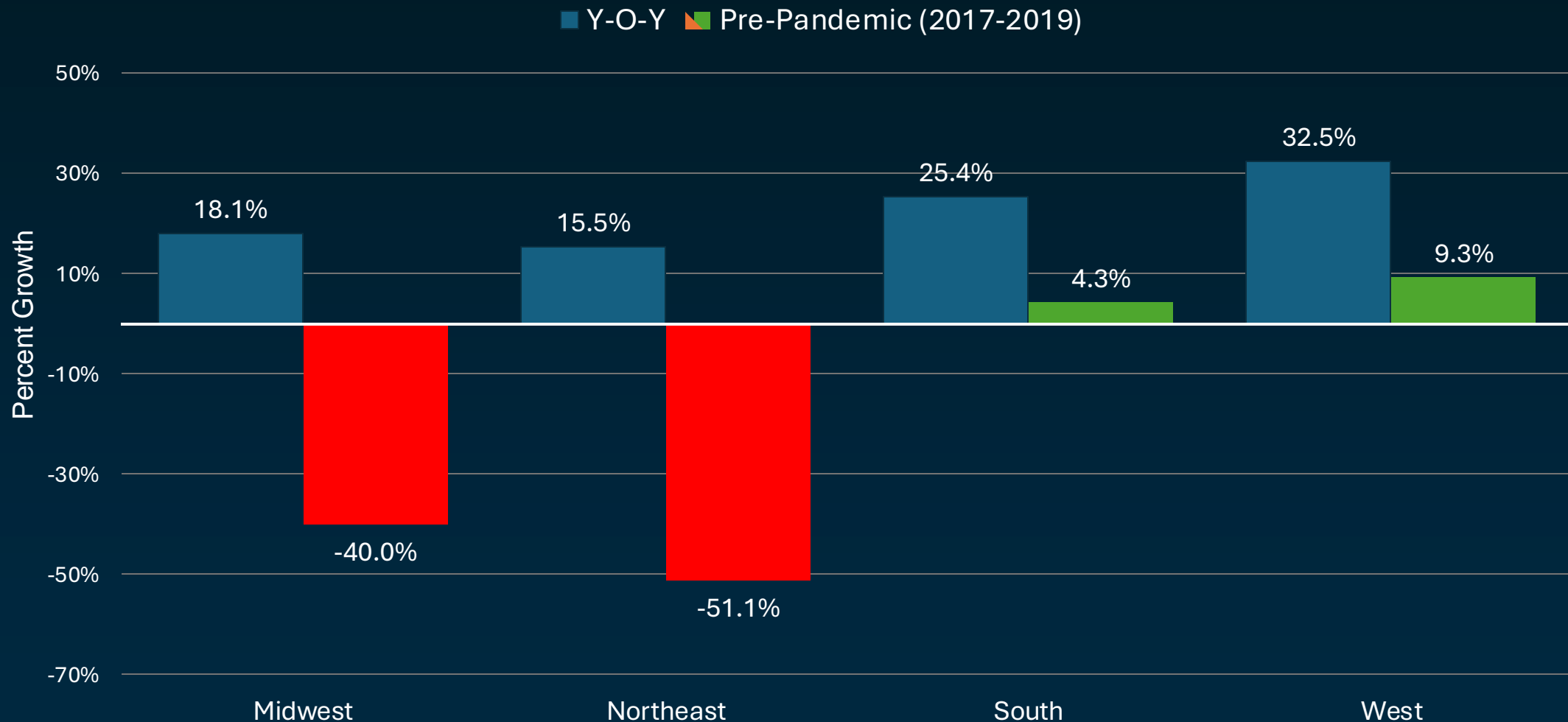
Inventory Topped 1 Million for the 3rd Consecutive Month

Active Monthly Listings Count, in Thousands



Where Housing Inventory Is Growing the Fastest

Compared to Pre-Pandemic Norms, Inventory in the West and South Has Effectively Recovered



There's three markets (IMO)

- **1. The rising inventory – buyer's markets**
- **2. The hot – seller's markets, but mostly**
- **3. The bi-polar 🤪🌀 markets**



Here's what the study revealed >>>

- Every drought ends in a recovery.
- Rates drive growth.
- Today's fundamentals are strong.
- Demographics (demand) on our side.
- **We don't have enough homes, period. And yes, It's all about affordability.**

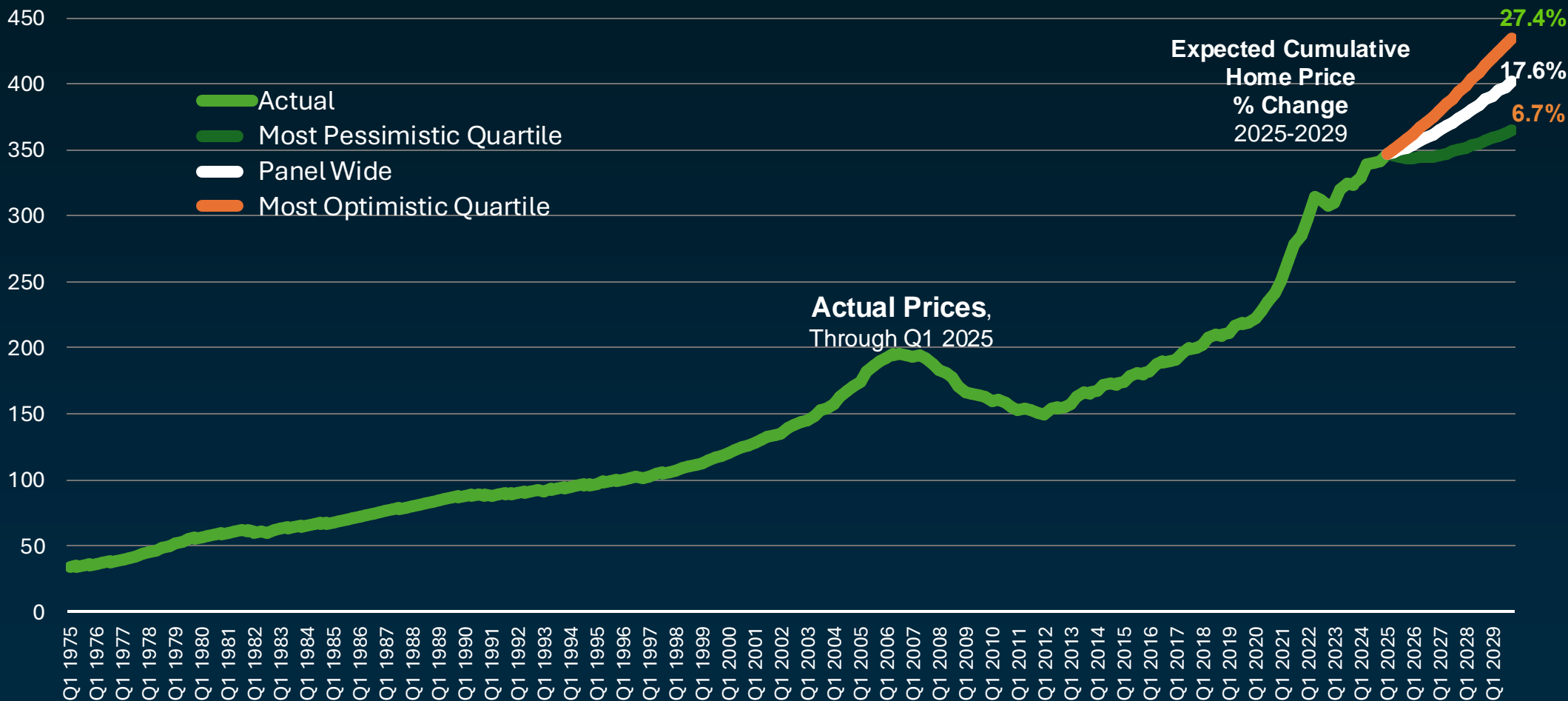


Home buyers *are moving*,
to communities they can *afford*.
(like we always do)

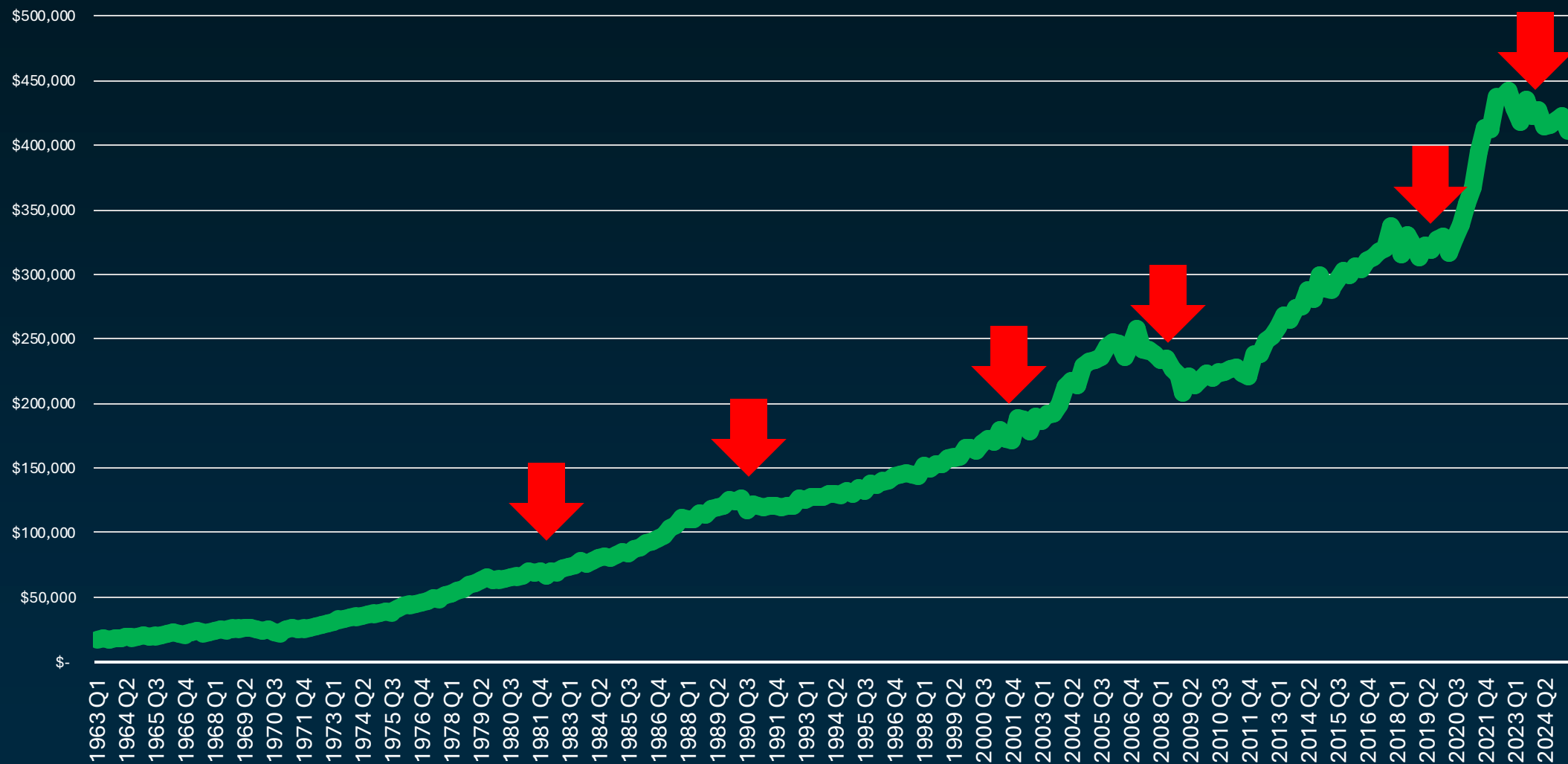


U.S. Home Price Expectations

Fannie Mae Home Price Index Mean Expectations, Q2 2025-Q4 2029



6 Dips in Pricing Over The Last 50 Years



Warren Buffet just invested \$800mil into Lennar

(now \$1,375
billion in 2025)

Berkshire Hathaway's Warren Buffett bets big on homebuilders

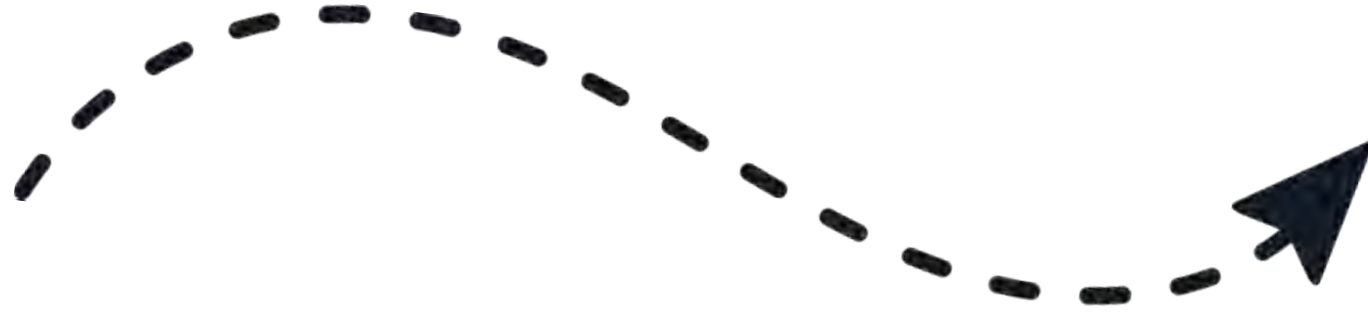
AUGUST 18, 2025

| BY: AMEER@TRUSTEDTEAM.COM



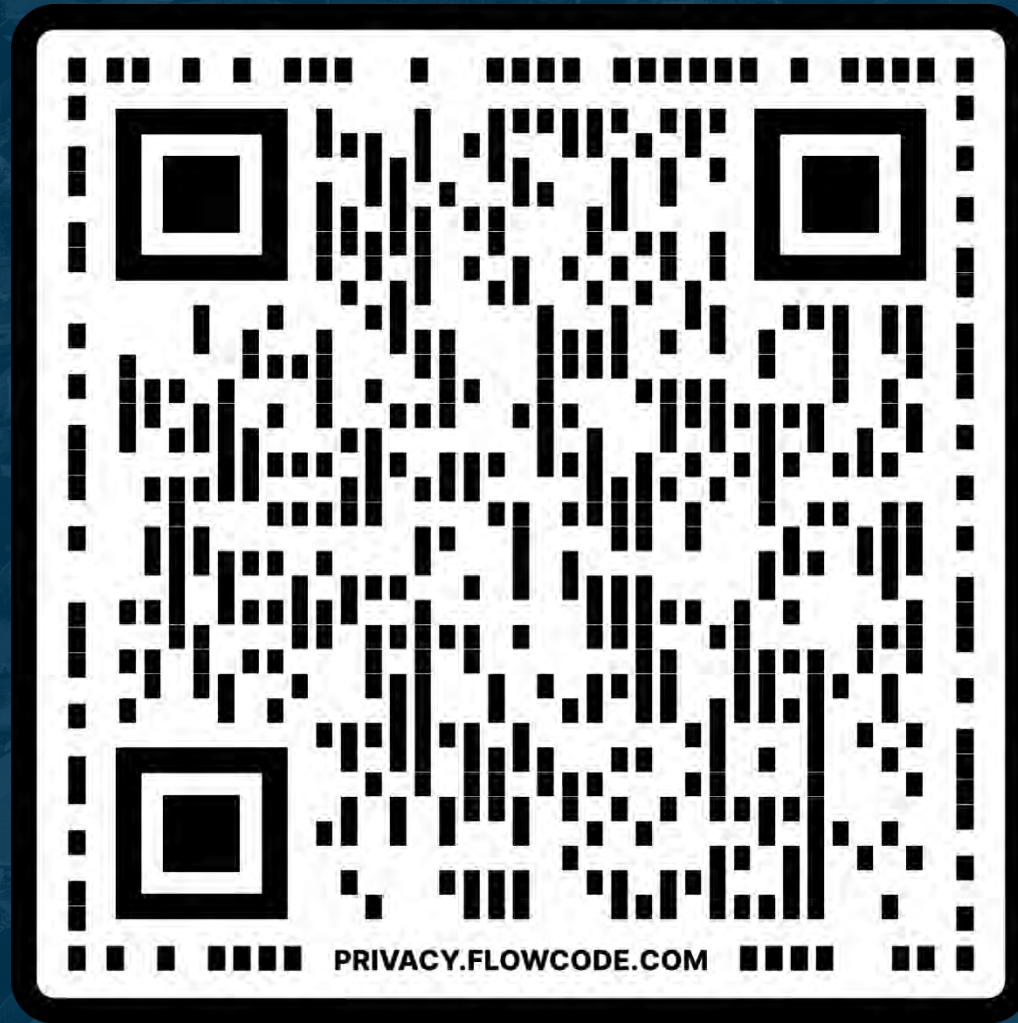
Businessman and investment icon Warren Buffett is making waves in the housing industry. Documents filed last week with the Securities and Exchange Commission (SEC) revealed that Buffett's Berkshire Hathaway has made major investments in homebuilders Lennar and D.R. Horton.





**“Every drought ends in
recovery.”**





The 2nd research piece



Research – FNF + TFI

Listings competition analysis



How many **listing sold** did you have

in **2024?**



AGENTS

Data for the first 6 months of 2024

LISTINGS SOLD

1,111,200



0

215,534



2.7 per agent

507,275

91,117



6.8 per agent

530,127

30,557



14 per agent

369,627

6,255



24 per agent

131,246

2,579



36 per agent

79,658

2,134



123 per agent

224,824



We recognize that
"partnerships" & "teams"
skew the #'s single MLS ID



WE ANALYZED,
WHO'S WINNING ALL THE
LISTINGS RIGHT NOW?



AGENTS

Data for the first 6 months of 2025

LISTINGS SOLD

1,065,000 ↓



0 🤖

344,942 ↑



2.1 per agent

735,678 ↑

66,948

↓



7.6 per agent

513,746 ↔

16,831

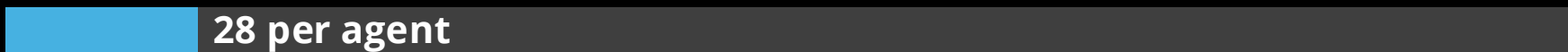
↓



16 per agent

272,849 ↓

3,427 ↓



28 per agent

97,135 ↓

1,446 ↓



42 per agent

60,565 ↓

1,407 ↓

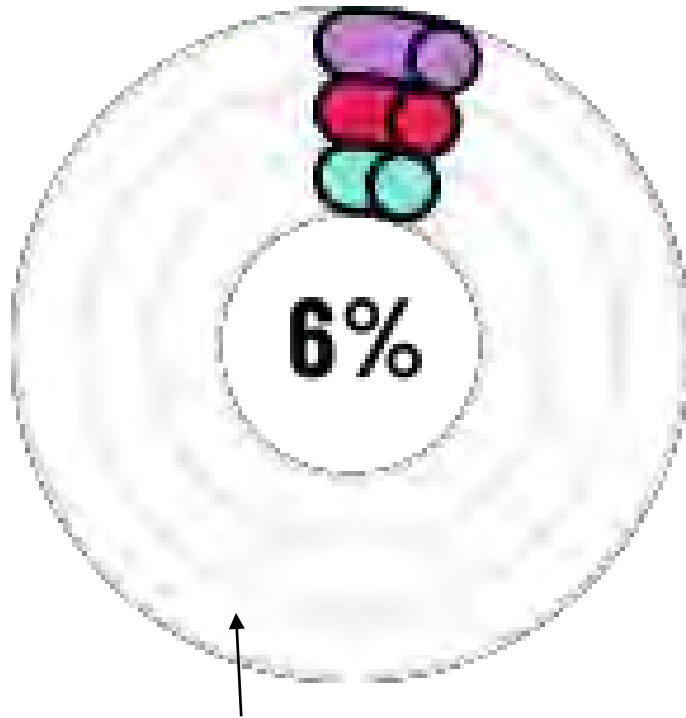


128 per agent

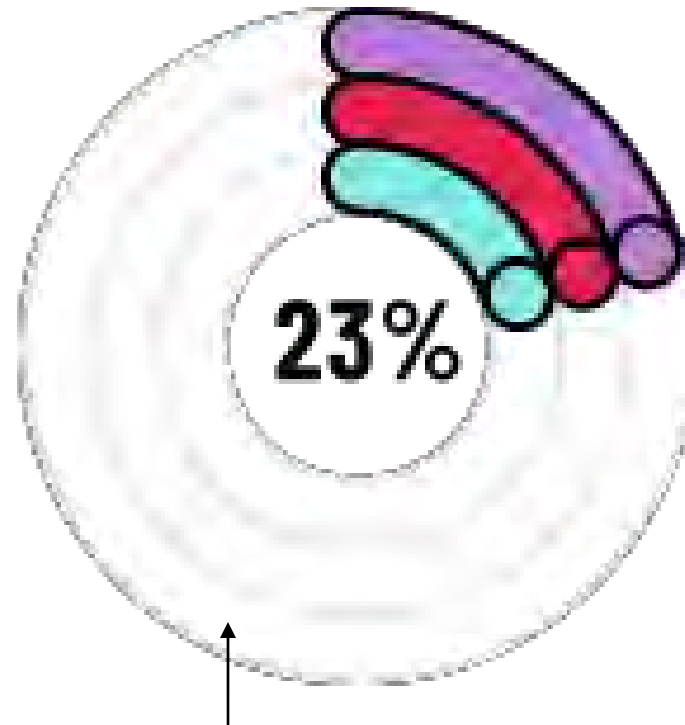
180,027 ↓



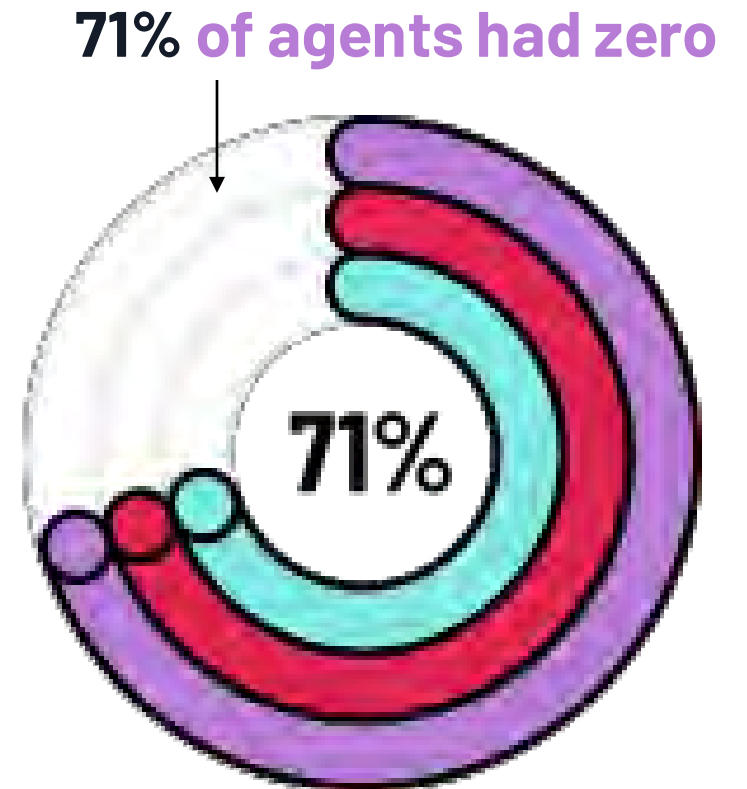
Data for the first 6 months of 2025



6% of the agents and team controlled 60% of the listing sold



23% controlled 40%



71% of agents had zero



It's **NOT** the market, *it's you.*

(this is the best news ever!)



We identified (not so obvious) insights

5 insights



1

Consolidations happened.

It's Uber Competitive



Competition Index Trend (2009-2025)



2

**Consumer Behaviors
are Changing.**



How did you choose the real estate agent who helped you sell your home?



FNF surveyed 2000 home sellers.

“What mattered most when deciding, *who to work with?*”

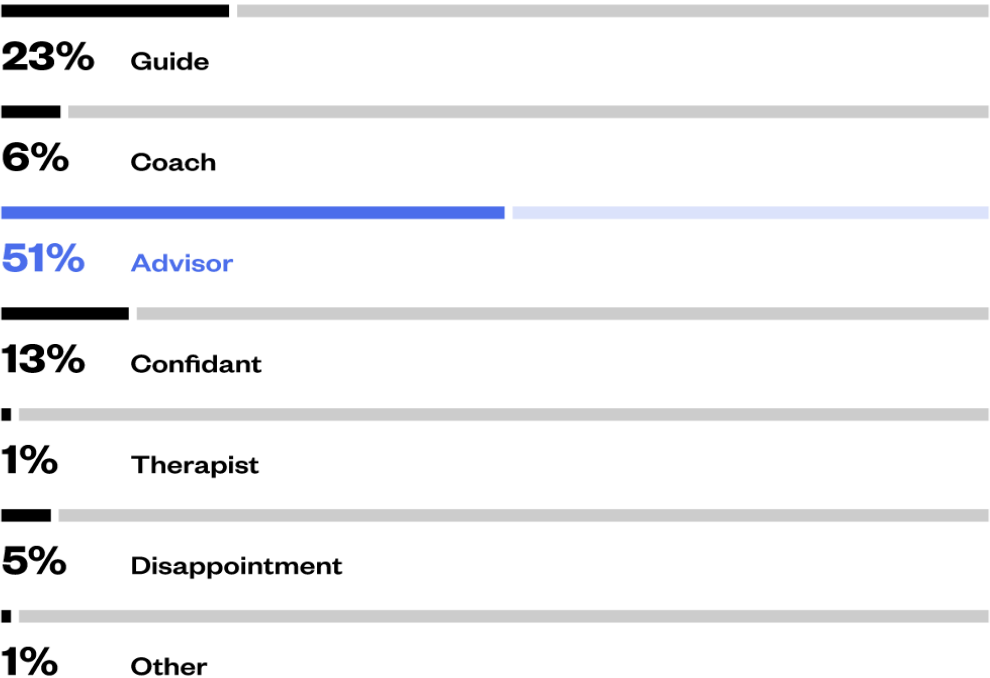


“What mattered most *when deciding who to work with?*” (*select top 3*)

- 1. Responsiveness**
- 2. Experience & Track Record**
- 3. Local Market Expertise**
- 4. Personality & Communication Style**
- 5. Reputation & Reviews**



Which word best describes the real estate agent who helped you in your last home sale?



Represents 93% of respondents who used a real estate agent the last time they sold a home



Thanks @1000watt

Agent is the job.
Advisor is the Value.

Agent is the **job**.

Advisor is the value.



3

**Marketing is the
ultimate competitive
advantage!**



3 groups winning majority of listings

- 1. Individuals & teams arbitraging portals & multi-channel marketing campaigns.
- 2. The marketing-prospectors.
- 3. The social (*on & offline*) networker.



**IF YOU'RE NOT MARKETING
YOU'RE *NOT WINNING!***





**WHAT'S THAT EGO
SAYING RIGHT NOW?**



1st 3 | insights |



1

It's Uber Competitive.

(Consolidation is happening)



**It's not getting
*easier.***



2

**Consumer Behaviors
are Changing.**



And *you already* know it.



3

**Marketing is the
ultimate competitive
advantage!**



**The best market like Nana's
Lasagna – *in layers!***





4

Sellers choose competence.

(demonstratable skills & experience)





Ken Griffin (\$45B Net Worth)
Learning how to sell is the most
important thing



If we're all gonna eat.
Someone has to sell!



5

Be First.
Be Fast.



BE FIRST.
BE FFAST!





What are you
thinking?



**WHAT AM I REALLY
TELLING YOU?**



In business, there's no standing still, you're either...

- **Gaining Momentum** 

- Or Losing It 





SUP'n at Stinky's Point



**WHAT AM I REALLY
TELLING YOU?**



You've got to *do everything* in your power...

**to generate as
much momentum
as possible for the
next 141 days.**



**WHO EVER DOES THE REAL
WORK NOW... WINS!**



It's **NOT** the market, *it's you.*



**WHAT'S STOPPING
YOU FROM DOING THE
WORK, *THAT WORKS?***



In a
drought...

**momentums
biggest
threat**



**YOU CHOOSING
EGO > ECONOMICS**



LET ME EXPLAIN



Your ego is lazy & manipulative

If you've ever said to yourself...

- "I don't need this anymore" "not in my market"
- "I'm tired" or "I don't want to do videos"
- "I tried that AI once" or "My clients don't care for (x)"
- "I really need to focus on this escrow/client"
- ***"I just don't like doing (X)..."***



**THAT'S NOT YOU. THATS
YOUR EGO > ECONOMICS**



**HERE'S WHAT I
KNOW TO BE TRUE
ABOUT THAT *"EGO"***



YOUR EGO LOVES

COMPLAINING

(about everything)



YOUR EGO LOVES

COMPARING

(this market to the past)



EGO LOVES CRITICIZING

(your ego loves to beat you up)



EGO LOVES GETTING ORGANIZED

(your ego loves getting ready)





But Tom...



"it's not done"

"it's not perfect"

"it's not ready"

"I'm not ready"



GETTING ready is a myth.

YOU start.

YOU suck.

YOU figure it out.

YOU get better.



**HOW'S
EGO > ECONOMICS
WORKING OUT?**



CHOOSE
ECONOMICS > EGO



GO GET THE MONEY!



Economics > Ego

It's the decision to ...

- *Stop listening to the lazy ego.*
- *Do whatever it takes to help your clients win.*
- *Whatever it takes for YOU to win!!!*
- *Go get the money!*
- *Go help the people you care for!*



ECONOMICS > EGO

= DO WHAT EVER IT TAKES



**But Tom,
It's Hard!!!!**

TF



IT'S JUST BUSINESS.

(and it's biblical)

IT'S THE HERO'S JOURNEY

It always starts with an average person. Who finally makes a decision to get over the fear.

Do work that crushes your ego and births a hero.



**WHAT AM I REALLY
TELLING YOU?**



**THIS MARKET NEEDS
YOU TO BE A HERO!**



**YOUR FAMILY NEEDS
YOU TO BE A HERO!**



**YOUR CLIENTS NEED
YOU TO BE A HERO!**



**YOUR GOALS NEED
YOU TO BE A HERO!**



**YOU NEED YOU
TO BE THE HERO!**



**"Now is the time,
to set aside that ego
(complaining, comparing, getting ready, the criticizing)
and DO what it takes to
generate & sustain
momentum!"**





Just *DOOOOO!*



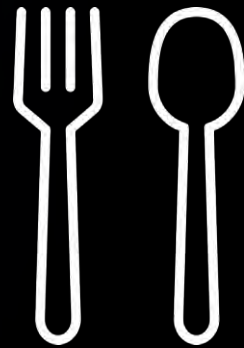
YES, I'M TALKING
TO ***YOU!***



It's **NOT** the market, *it's YOU.*

(this is the best news ever!)





C u in 90 min!



ASK YOURSELF...
"KNOWING WHAT
I KNOW **NOW**





How soon would I have gone all in ...

Launching my Website/SEO
(traffic \$ today vs then)





How soon would I have gone all in ...

Email Marketing
(past open rates/today)





How soon would I have gone all in ...

Buying Online Leads

(cost of leads in 2005 vs today)





How soon would I have gone all in ...

Nurturing my Database for Repeat & Referrals

(80 / 12%)





How soon would I have gone all in ...

Creating my systems





How soon would I have gone all in ...

**Hired my first
assistant**





How soon would I have gone all in ...

YouTube





How soon would I have gone all in ...

**Facebook, Instagram, X,
TikTok, LinkedIn, Pinterest**





How soon would I have gone all in ...

Optimizing my Google Business Profile





How soon would I have gone all in ...

Building a social audience





How soon would I have gone all in ...

Stacking-up “reviews”

(5 reviews = 90% more free leads)





How soon would I have gone all in ...

**Geographic farming
dominance**





How soon would I have gone all in ...

**Improving my sales &
presentation skills**





How soon would I have gone all in ...

Building my team





How soon would I have gone all in ...

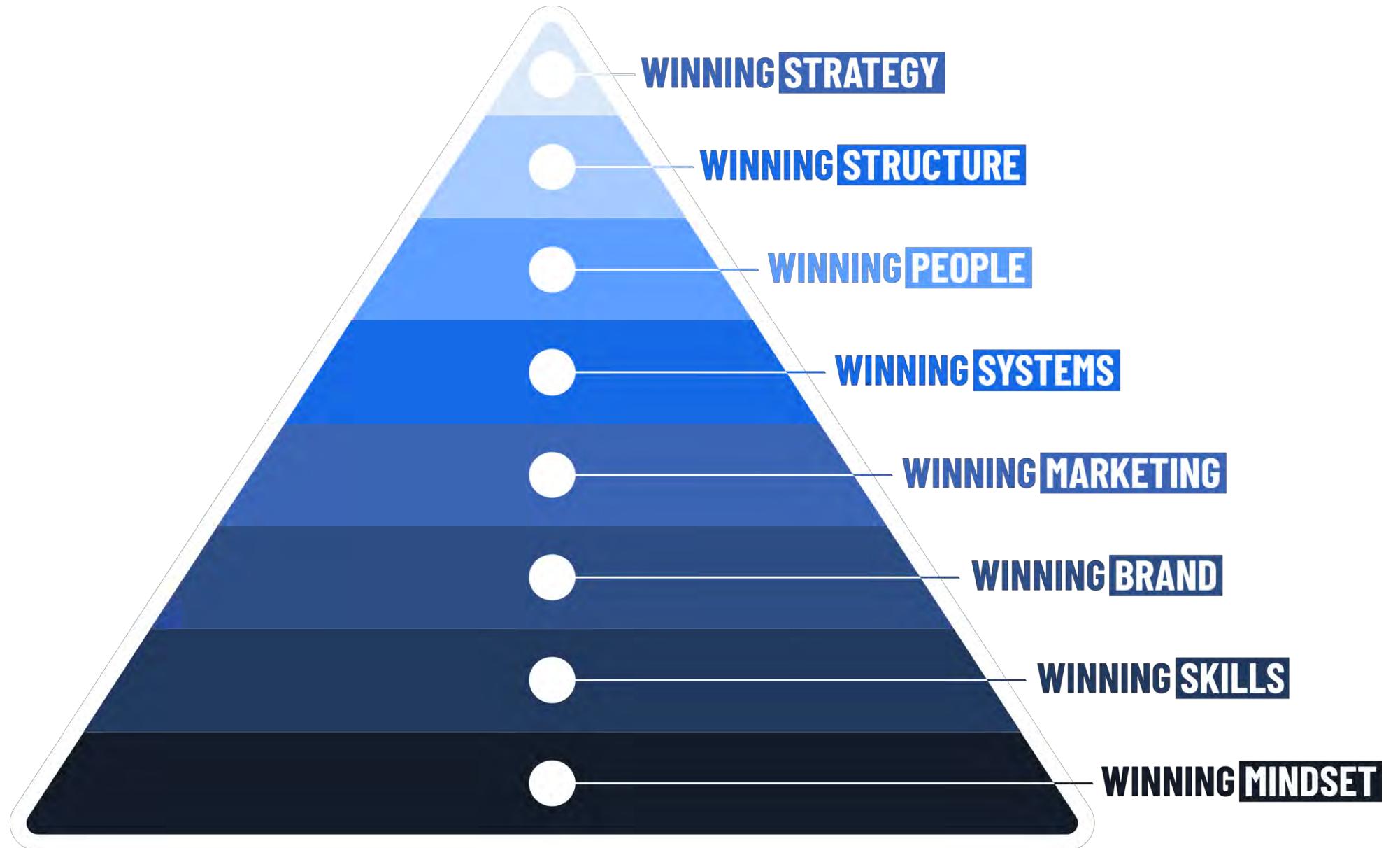
Using AI





*"Where do I need to
level up?"*





JASON PANTANA

Top 10 AI Marketing Automations
to Save You Time!

WINNING SYSTEMS
WINNING SKILLS



@JASONPANTANA

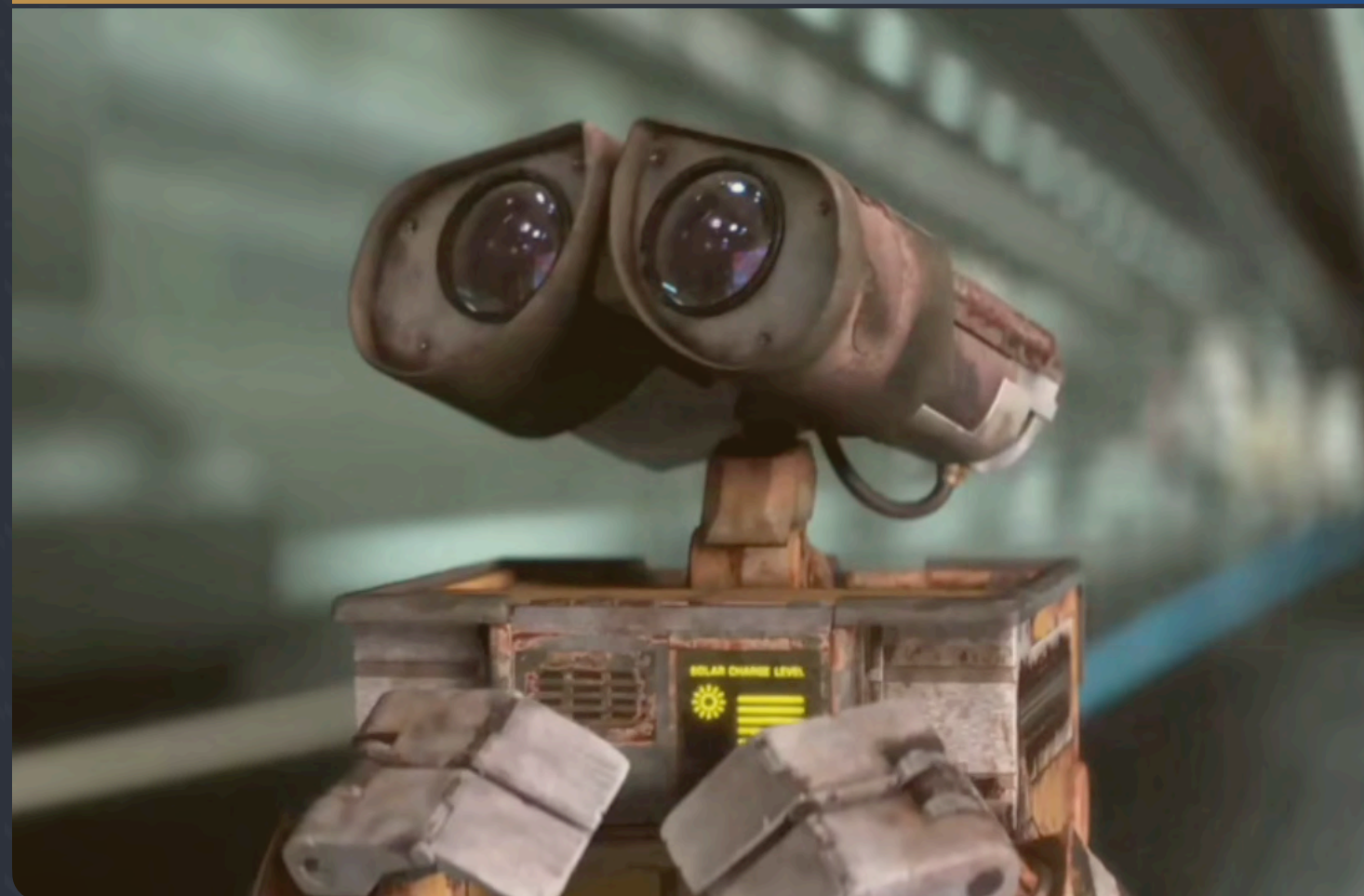


AGENTIC AUTOMATIONS ✦

JETSONS



WALL-E



IDIOCRACY





“The true potential of AI lies in its ability to amplify human creativity and ingenuity, not to replace it.”

ENHANCE
NOT ELIMINATE

@JASONPANTANA



AGENTIC AUTOMATIONS ✦ —

AGENTIC AI

Takes initiative, makes decisions, and executes tasks toward a goal without step-by-step instructions

AGENTIC AUTOMATIONS ✦



PROMPTS



AGENTS



VEO 3



RESEARCH



TASKS



COMET



HEYGEN



NOTEBOOKLM



ELEVENLABS

AGENTIC AUTOMATIONS ✦ —

- 1 **Appointment Dossier:** Deep research → drive-time audio brief
- 2 **GPT Blog Builder:** Perplexity finds hot AI Qs → ChatGPT blogs
- 3 **Listing Launch Kit:** Veo + ElevenLabs; multichannel marketing
- 4 **Autonomous Browsing:** Comet, the browser that runs itself
- 5 **Always-On Meta Ad:** Zapier Agent nonstop CRM retargeting
- 6 **AI Alerts Agent:** Perplexity Tasks eclipse your Google Alerts
- 7 **Green Screen Avatar:** HeyGen avatars for Instagram Reels

+

Home

Discover

Spaces

Account

Upgrade

Install

Role You are a Real Estate Research Analyst tasked with preparing a...

Perplexity

Assets

Steps

Images

Sources · 66

compass.com

618 Hunters Ln, Brentwood, TN 37027 | MLS #290453...

murfreesbororealestate

618 Hunters Ln, Brentwood, TN, 37027 - Photos, Video...

Trulia Real Estate Sear...

Hunters Ln, Brentwood, TN 37027 - See Est. Value,...

Zillow

618 Hunters Ln, Brentwood, TN 37027 | MLS #290453...

Property Dossier: 618 Hunters Ln, Brentwood, TN 37027

Basic Facts

Address: 618 Hunters Ln, Brentwood, TN 37027

compass +2

Year Built: 1979

murfreesbororealestate +1

Builder/Developer: No specific builder identified for this property

Style/Type: Single Family Residence, 4 bedrooms, 3 bathrooms

compass +1

Lot/Size: 4,179 sq ft on 0.72 acres (31,363 sq ft lot)

murfreesbororealestate +1

Chronology

1979: Property originally built

compass +1

2005: Sold for \$367,500

compass

2007: Sold for \$385,000 (2.21% annual appreciation)

compass

2015: Sold for \$570,000 (4.70% annual appreciation over 8.5 years)

compass

2017: Sold for \$654,500 (7.76% annual appreciation)

Share

Export

Rewrite

Ask a follow-up...

@JASONPANTANA

Ai MARKETING ACADEMY



Sources



+ Add

Discover

Select all sources



618 Hunters Lane: A Property and ...



Chat



AiM Demo

1 source

This report provides an extensive overview of a specific property located at **618 Hunters Lane in Brentwood, TN**, detailing its **physical characteristics, historical sales data, and current market context**. The document also includes a **seller dossier**, offering insights into the owners' professional backgrounds and potential motivations for **backgrounds andphasizing that the sellers, the Franklins, are not in distress**. Finally, the report conclughting both **opmary of key opportunities for competitive positioning and potential comg and premium** the property, such as its below-market pricing, premium location, and extended market time. The appended links, though not explicitly detailed in the report's content, suggest an external context related to **privacy and asset protection in real estate**, indicating a broader scope beyond the immediate property analysis.

Save to note



Add note



Audio Overview



Mind Map

Start typing...

2 sources



What is the comprehensive market position and value proposition of the property



NotebookLM can be inaccurate; please double check its responses.

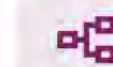
Studio



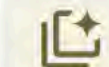
Audio Overview



Video Overview



Mind Map



Reports



The Deep...

2 sources · 1d ago



Interactive



618 Hunters Lane: Brentwood...

2 sources · 1d ago



The Deep Dive: Yo...



00:00 / 16:58

AGENTIC AUTOMATIONS ✦ —

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Q:

Why pay for what
AI does **better**?

AGENTIC AUTOMATIONS ✦

● Market Reports

● Social Templates

● Ad Copywriters

● Newsletter Emails

● Video Scripts

● SEO Optimizers

● Post Planners

● Caption Copy

● Lead Magnets

● Video Topics

● Blog Generators

● Listing Descriptions



20+



Neil Patel 
@neilpatel

Follow



Ranking #1 on Google Means Nothing If You're Losing to AI Answers

The more you optimize for AI citations (not just rankings), the more you'll capture this high-intent traffic, even if your Google traffic stays flat.

The sooner you realize AI visitors are buyer-ready (72.5% engagement vs. 60.4% from search), the faster you'll stop leaking sales to competitors who are visible in AI answers.

The bottom line? AI-driven traffic (ChatGPT, Gemini, Perplexity) converts 10-23X better than organic search, yet most brands don't even track it.

[#AISEO](#) [#HiddenTraffic](#) [#SEOConversion](#)

AGENTIC AUTOMATIONS ✦ —

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Q:

With rising DOM, do
sellers **expect more?**

AGENTIC AUTOMATIONS ✦



EMAILS



BLOGS



VIDEOS



ADS



IIElevenLabs

Creative Platform

Home

Voices

Playground

Text to Speech

Voice Changer

Sound Effects

Voice Isolator

Products

Studio

Music

Dubbing

Speech to Text

Text to Speech

<?xml version="1.0" encoding="UTF-8"?>
<speak>
 <emotion category="excited" intensity="medium">
 <prosody rate="medium">
 <!-- 0s-6s Exterior -->
 <s>Welcome to this <emphasis>three-story home</emphasis> with its own garage
on the bottom level—easy, everyday convenience from the start.</s>
 <break time="500ms"/>
 <!-- 7s-15s Entry + Flex Room + Bath -->
 <s>Just inside, you'll find a private <emphasis>flex room</emphasis>—perfect as
an office, gym, or guest space—along with a convenient bathroom in this tucked-away
area.</s>
 <break time="600ms"/>
 <!-- 16s-25s Dining + Living -->
 <s>Heading upstairs, <emphasis>engineered wood floors</emphasis> carry you
through the dining room and into the living area.</s>
 <s>This space is warm, open, and ready to entertain.</s>
 <break time="500ms"/>
 <!-- 26s-33s Living Room Focus -->
 <s>The living room centers around a <emphasis>stunning accent wall</emphasis>
—a true focal point of the home.</s>
 <break time="500ms"/>
 <!-- 34s-40s Kitchen -->

272,217 credits remaining2,991 / 5,000 charactersGenerate speech

SettingsHistory

Voice

Jason Pantana (PRO)

Model

V2 Eleven Multilingual v2

The most expressive Text to SpeechTry v3 (alpha)

Speed

SlowerFaster

Stability

More variableMore stable

Similarity

LowHigh

Style Exaggeration

NoneExaggerated

Speaker boost

Reset values

My Account

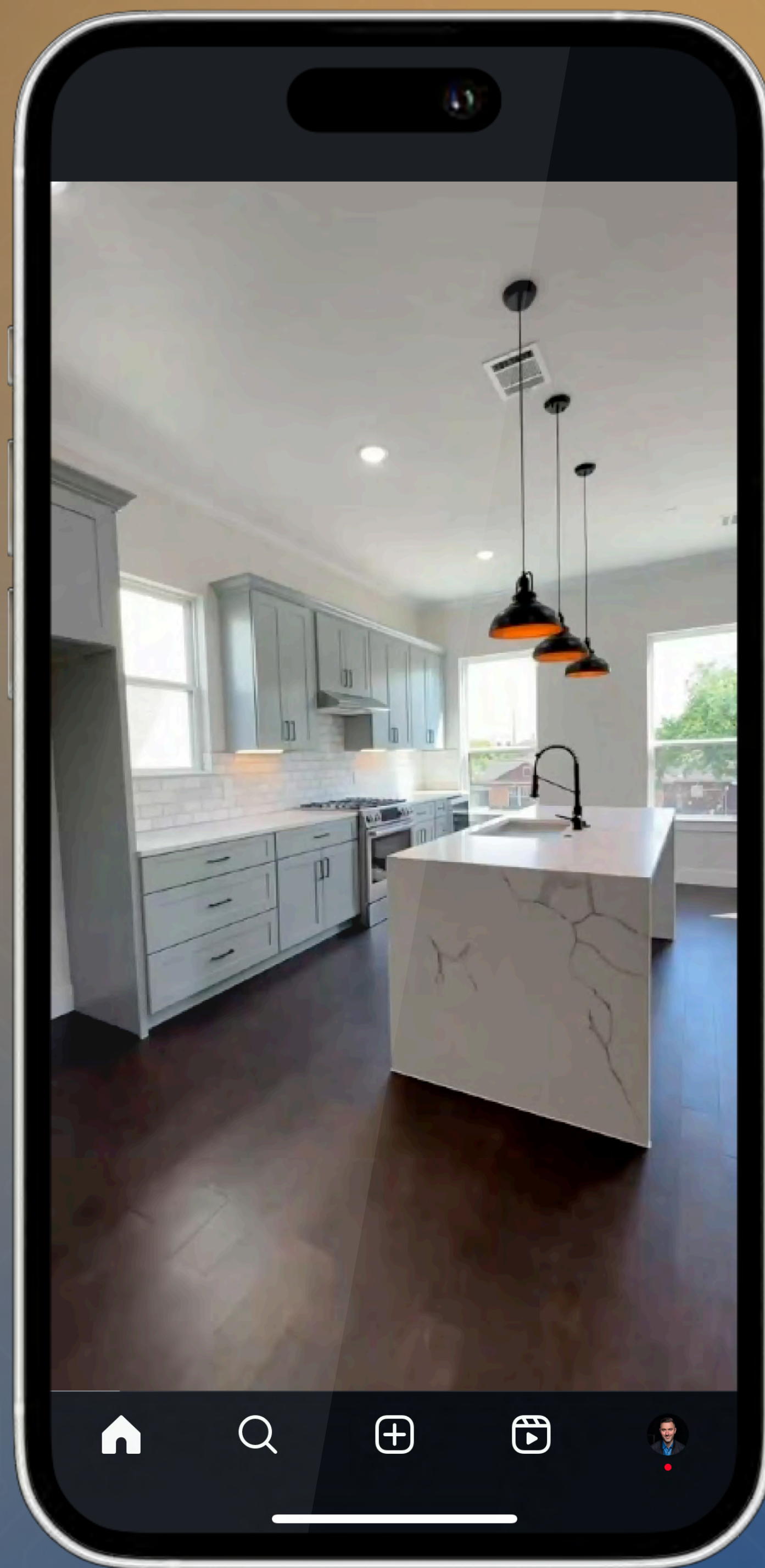
Workspace 7853509ebe...

<speak xml:lang="en-US" version="1.0"> ...

Jason Pantana (PRO) · Created 1 second ago

0:151:06

ShareDownload





Post



20+



Salma

@Salmaaboukarr

Subscribe



Finally got round to testing Veo 3 for ads- IKEA (inspo ad)



6:18 AM · Jul 19, 2025 · 1.3M Views



330

954

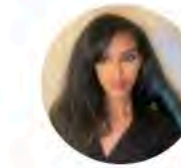
12K

10K



Search

Relevant people



Salma

@Salmaabo...

Following

AI for Brands | sharing
practical ai use cases &
prompts | building @qreates





Gemini

2.5 Flash ▾



PRO



```
{  
  "metadata": {  
    "prompt_name": "AiM Staging (Empty → Box →  
Restore)",  
    "base_style": "cinematic, photorealistic, 4K",
```

🛡️ Enter a prompt for Gemini



Video ×



Your Jason Pantana chats aren't used to improve our models. Gemini can make mistakes, so double-check it. [Your privacy & Gemini](#)



TRAINING

PROMPTS

What's on the agenda today?

Study how I communicate in the attached writing sample—pay close attention to my tone, phrasing, rhythm, sentence structure, word choice, and personality.

+

🎤

↑

I did what I learned in AiM and started getting buyers and listings off of ChatGPT

Since joining AiM, I've built a couple of really cool tools with Claude for to enhance my transaction coordination processes and reports for my seller clients.

After 27 years of mostly analog real estate, it's time to shift my business and commit to rebuilding/rebranding digitally. Thank you for being at the leading edge of AI

You are a spectacular coach and trainer! I'm invested in AiM all in, for the year, and committed to learning it all!

Loving the format of AiM... it's so easy to absorb the materials and incorporate in my business

TOOLS

ZOOMS

AGENTIC AUTOMATIONS ✦ —

- 1 **Appointment Dossier:** Deep research → drive-time audio brief
- 2 **GPT Blog Builder:** Perplexity finds hot AI Qs → ChatGPT blogs
- 3 **Listing Launch Kit:** Veo + ElevenLabs; multichannel marketing
- 4 **Autonomous Browsing:** Comet, the browser that runs itself
- 5 **Always-On Meta Ad:** Zapier Agent nonstop CRM retargeting
- 6 **AI Alerts Agent:** Perplexity Tasks eclipse your Google Alerts
- 7 **Green Screen Avatar:** HeyGen avatars for Instagram Reels



AGENTIC AUTOMATIONS ✦

● Create Online Ads

● Post Your Videos

● Draft/Publish Blogs

● Syndicate Content

● Run Comps/CMA

● Send Invitations

● Reply to Emails

● Reply to Message

● Reply to Comments

● Build Automations

● Schedule Showings

● Perform Data Entry

● Shop for You Online

● Organize Your Files

● Route/Engage Leads

AGENTIC AUTOMATIONS ✦ —

- 1 **Appointment Dossier:** Deep research → drive-time audio brief
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- 7 **Green Screen Avatar:** HeyGen avatars for Instagram Reels

GENERATIVE AI

×MORE

×FASTER

×BETTER



Ai MARKETING ACADEMY



SAVE 50%
CHECKOUT CODE:
SUMMIT50

◆ RESOURCES & PROMPTS ◆

**Gemini/Veo 3
“Box Explosion”
JSON prompt**



**Appointment
Prep Dossier
Prompts**



**Perplexity Powered
Blog Writing GPT
Instructions**



**Time-Synced
Property Tour
Voiceovers**



PANEL

DEREK CALDWELL
KATIE DAY
BEATRIX WHIPPLE

From Tech Rookies to AI
Rockstars

WINNING SYSTEMS
WINNING SKILLS



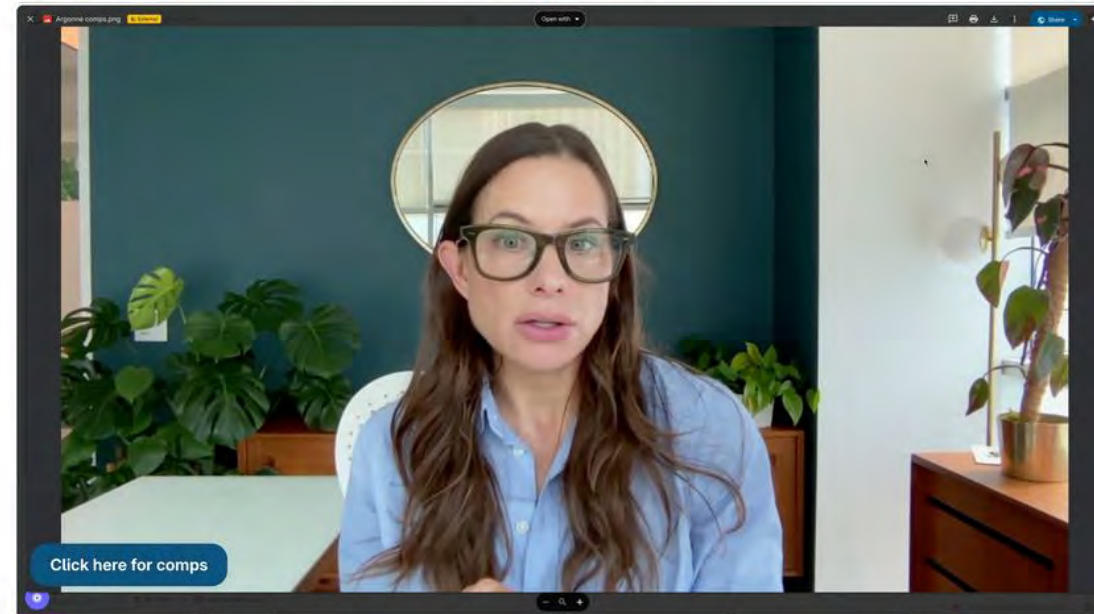


Loom is a video messaging tool that uses AI to automatically transcribe, title, summarize, and chapter your recordings—making communication faster, clearer, and more human.

By combining face-to-face connection with screen sharing and annotation, it builds trust, boosts engagement, and simplifies complex explanations with just one click.

The
WHIPPLE
Group

Analysis of Property Comps and Market Insights - Watch Video



Hi Jesus, thank you for your patience on this analysis. I went through all of the comps relevant to Argonne and created a spreadsheet summarizing the numbers. You can use the button below to view the comps directly, and I've also linked the spreadsheet for easy reference. I'm not walking through the MLS details here—just focusing on the key figures.

Here's a breakdown of the most important points:

- **Argonne (your property)**
 - List price: \$1,795,000
 - Days on Market: 28
 - Net Operating Income (NOI): \$54,600
 - Cap Rate: 3.04%
 - No price reduction yet, no list-to-sell ratio as it's still active
- **Toledo (low outlier)**
 - Sold for \$1.6M after 216 days
 - Original list price was \$1.999M (almost \$400K reduction)
 - 80% list-to-sell ratio
 - Considered a low watermark comp—sat for a long time, likely sold under pressure
- **Orizaba (active)**





Saved Prompts

Saved Prompts is a free Chrome extension that lets you store and label your most-used AI prompts for quick access and effortless reuse.

It eliminates repetitive typing and streamlines your workflow by allowing you to instantly paste prompts into tools like ChatGPT, saving time and boosting productivity.

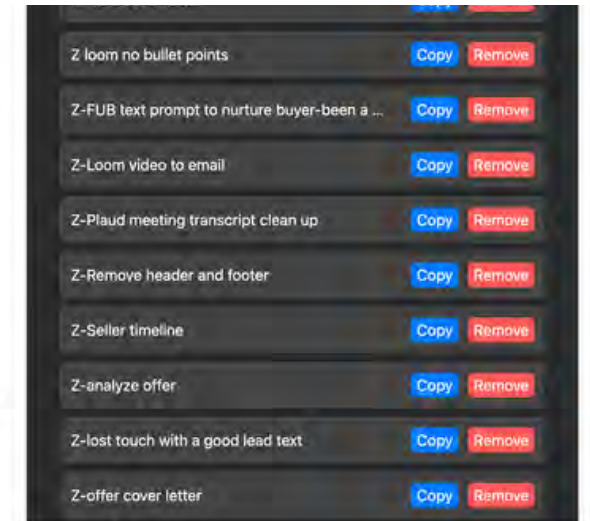


Saved Prompts

4.9 ★ (33 ratings) < Share

Extension Developer Tools 3,000 users

Remove from Chrome



What's on the agenda today?

Ask anything

+ Tools

PLAUD.AI

Plaud.ai is an AI-powered voice recorder and notetaker that captures meetings and calls with a single tap, then transcribes and summarizes them for easy reference.

By eliminating the need for manual note-taking, it lets you stay fully present in conversations, saving time while deepening client connection.



KRISTI JENCKS

The Buyer's Edge: A System That Delivers Jaw-Dropping Results

WINNING SYSTEMS

WINNING SKILLS



The Buyer's Edge

A System That Delivers Jaw-Dropping Results

@kristijencks



SUCCESS SUMMIT



**REALTOR ARRESTED
AFTER SENDING A LEAD
159K MESSAGES
AFTER SHOWING
PROPERTY**

**You can't automate
relationships. But you can
systemize the moments that
create them.**





The Buyers Edge



CONVERSATIONS

build trust



COMMITMENTS

earn signatures



CLOSINGS

spark referrals



SUCCESS SUMMIT

@kristijencks

The Framework



Tech

+



Human



SUCCESS SUMMIT



GHOSTABLE

CONVERSATIONS

Speed is *expected*.
Trust is **earned**.

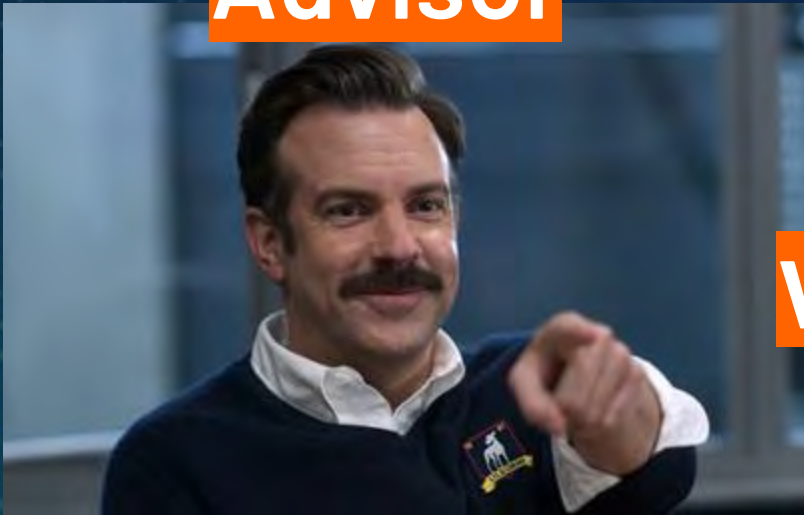


CONVERSATIONS: 🦾 Human Strategy

Mindset: Advisor

- Curious, Calm, and *Value Driven*

Advisor



VS




Salesperson



SUCCESS SUMMIT

CONVERSATIONS: Human Strategy

Emotion-Based Discovery Questions

-  **Vision & Desire (Tap into what they want and why)**
What has you thinking about making a move right now?
-  **Frustrations & Fears (Uncover past pain or hesitation)**
Have you been looking for a while or is this something new?
-  **Relationships & Life Changes (Dig into emotional context)**
Who else will be living in the home with you? What's important to them?

CONVERSATIONS: Human Strategy

Emotion-Based Discovery Questions

Timing & Readiness (Emotion meets urgency)

What's driving your timeline right now?

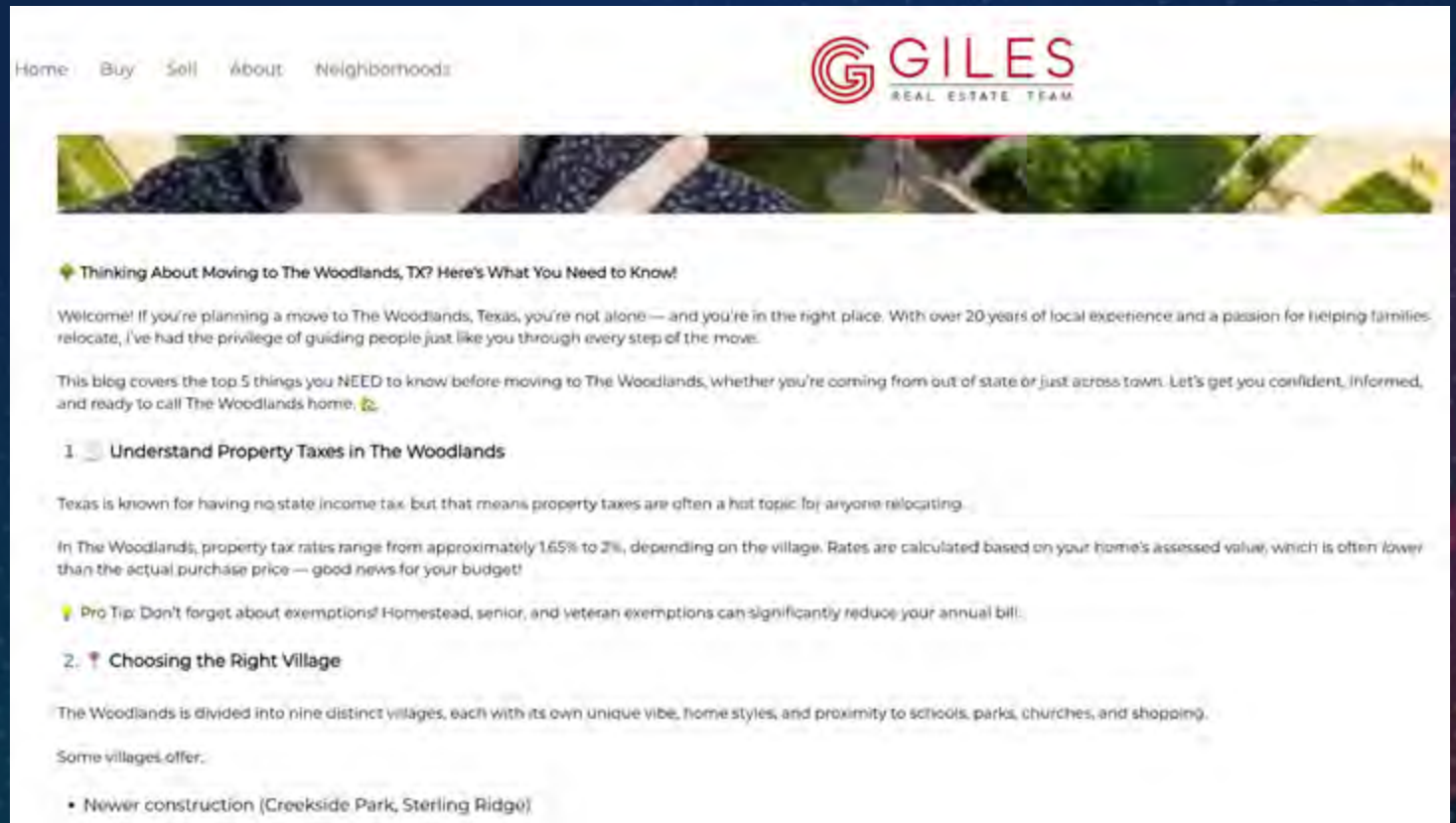
Decision-Making & Trust (Build rapport and alignment)

What does a great real estate experience look like to you?

CONVERSATIONS: Automation

Discovery Call

- Name
- Email
- Looking to Buy, Sell, Invest?
- Moving Timeline
- Price Point
- Have you visited before?
- Phone
- Tell us about your move!



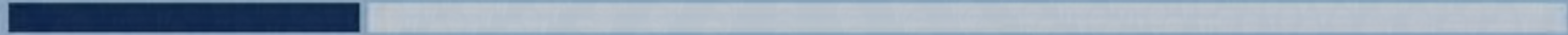
COMMITMENT



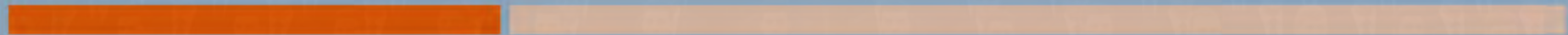
Structure builds trust.
And trust brings
signatures.



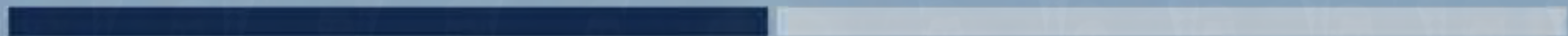
SUCCESS SUMMIT



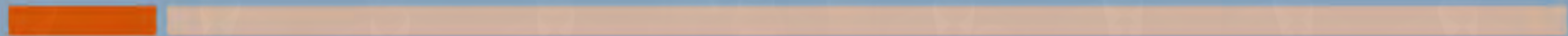
20% I don't like dealing with sales people



29% All real estate agents seem the same to me



47% I wasn't really sure what to look for in an agent



9% Other

Based on 1000Watt Survey



Jason Pantana



Tom Ferry



Jimmy Mackin



In a sea of sameness,

differentiation is everything.

COMMITMENT: Human Strategy

Mindset: Advisor

It's Stressful to Choose an Agent

- Your job is to *show* your value early.

Pre-frame Your Value

- "I'm here to help you make confident decisions, not just open doors."
- "I'll be your trusted advisor . My job is to make the process easier to understand and easier to act on."



Buyers Toolkit Checklist

Purpose: Run through this entire checklist prior to meeting a buyer to ensure we're showing up and providing value.

Add each item to a blue Slocum Home Team folder

Documents to include:

- ☐ MLS client printout
- ☐ Mandatory Relationship Disclosure
- ☐ Buyer Rep Agreement (if not signed electronically)
- ☐ Lead Disclosure
- ☐ Sales Disclosure
- ☐ Comparable sales in the area
- ☐ 21 Point bidding war checklist
- ☐ Slocum buyers book
- ☐ Must have checklist
- ☐ Resume
- ☐ What to expect when buying printout
- ☐ Credit repair tips
- ☐ Lender contact information
- ☐ Flyer for market update





JON TETRAULT

SRS, ABR, PSA, RSPS
TEAM SALES MANAGER & CHIEF OPERATING OFFICER

WORK EXPERIENCE

OWNER

2016 - PRESENT

• 10+ years of experience in the

• 10+ years of experience in the

• 10+ years of experience in the

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• 10+ years of experience in the

CONTACT

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SLOCUM
REAL ESTATE & INSURANCE

PROFESSIONAL REFERENCES

NICHOLAS SLOCUM - 401.861.7012 / NICK@SLOCUMHOMETEAM.COM
LINDA ARCOLETTE - 401.287.5223 / LINDA@KWAOR.COM
KRISTI JONES - 401.280.0015 / KRISTI@KWAOR.COM

Does it work?

+2.5%

+63%

SLOCUM
— HOME TEAM —



Nick Slocum
Team Leader

[@nickslocum](#)



Jon Tetrault
Head of Agent Growth

[@jontetrault](#)



SUCCESS SUMMIT

COMMITMENT: Active Buyers Checklist

Get Buyers Off the Fence

Non Negotiable

- Location & Needs
- Budget & Met with Lender
- CRM & Campaigns activated
- Connected on Social



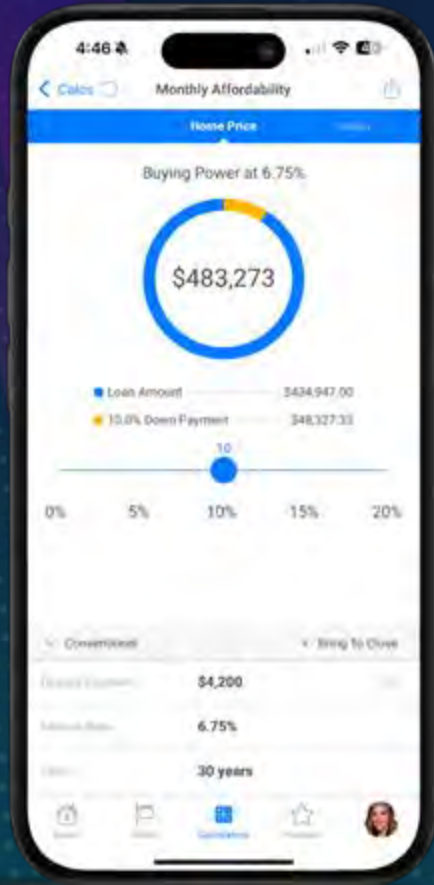
@jaydeesheppard_realty

Gateway
PROPERTIES



SUCCESS SUMMIT

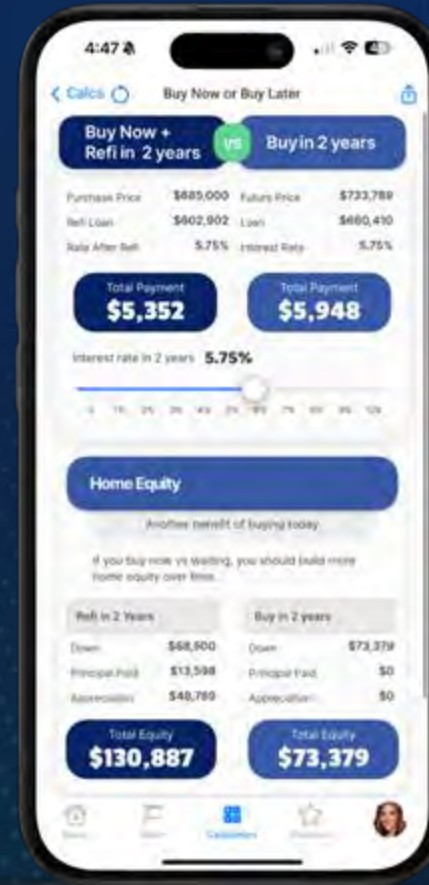
COMMITMENT: Automation + Tools



Monthly Affordability



Rent vs Buy



Buy Now or Buy Later

GET THE APP

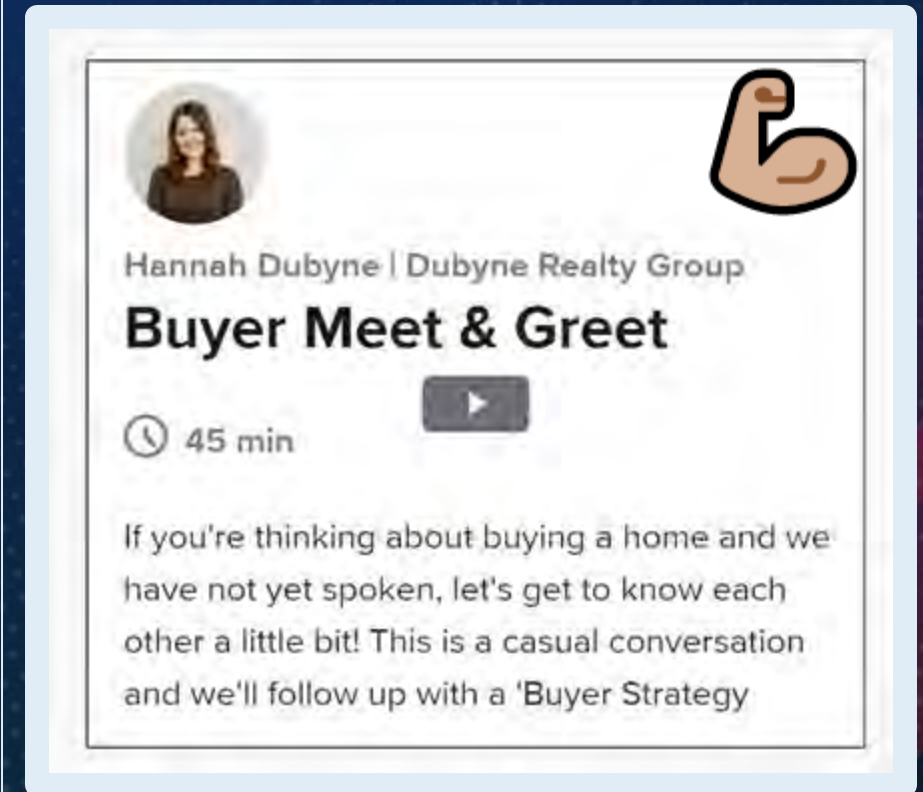


SUCCESS SUMMIT

COMMITMENT: Automation + Tools

Auto responder with a Booking Link

"The next step is to schedule a Strategy Session where we will go over how we work together, communication, dive deep into your preferences, what we charge, ideal neighborhoods, and then we can officially onboard you as a client."



COMMIT: Automation + Tools

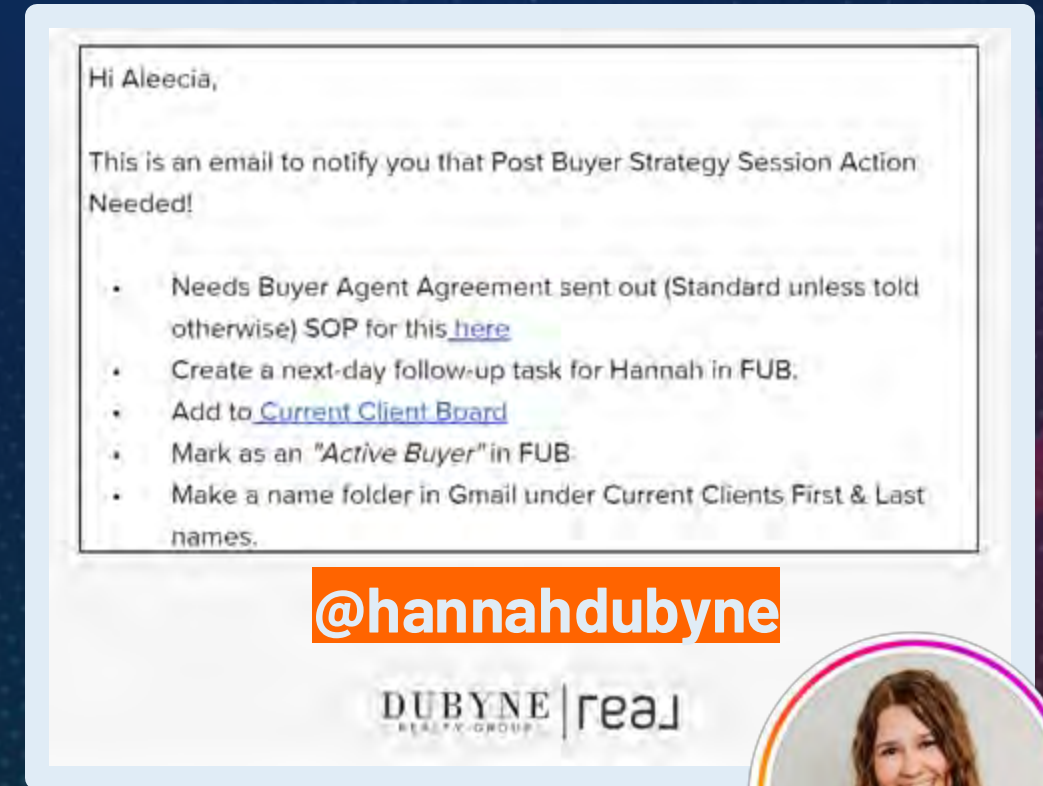
CRM Triggers

For the Agent:

- Use AI to summarize and give next steps
- Reminders for next step in the system

For the Buyer:

- Here's a recap video of how we help buyers win.
- 3 things you should know before you sign with any agent



CLOSINGS

Confidence wins the
house. **Process** gets the
review.



CLOSINGS: 🦾 Human Strategy

Mindset: Shift from “search helper” to a “**Strategic Buyer Advisor**”

- Confidence is the Currency of Action
- Buyers Need a System, Not Just Showings
- Buyer Clarity Guide



Emotional Road Map for Buyers



When anxiety hits, I manage it for you

Let's be honest. Buying creates anxiety. It's normal and expected.

The high-anxiety periods are exactly where my expertise matters most. I'm here to manage these stressful moments so you don't have to navigate them alone.



SUCCESS SUMMIT

Stand OUT with a Credibility Tracker

- **Property Address**
- **List Price**
- **Sale Price**
- **Buyer Savings**
- **Date Closed**
- **Credit to Buyer**
- **Turn into an infographic**



CLOSINGS: Automation + Tools

- Weekly Buyer Report
- Here's What Happens Next
- Videos
- Celebrate & Review

TAKE A LOOK AT YOUR
weekly report



You're not a faceless home buyer on my website. When you work with me to uncover your next home, a lot more goes into the process than just hitting "search".

Review your weekly update below and let me know what you think!

Click each to see the homes!

 **Homes we've toured**
All of the properties we have seen together

 **Homes still being considered**
Any homes you have short listed or are still considering

 **ALL the homes in your search criteria**
Any property that matches your specific search criteria, whether we've toured them or not.

My Efforts on Your Behalf

- 15** Calls made to find off-market properties
- 10** Doors knocked
- 20** "I have a buyer" letters sent
- 11** Social media posts
- 64** Emails sent

Your Current Search Criteria

Single family basement home with 4 bedrooms, 2.5 bathrooms, 3-car garage, .5 acre or more, \$850,000 - \$1.1M, in ground pool and spa, home office, horse property, within 5 miles of General Hospital, within 2 miles of Scranton High School, and located in Everest, Chestnut Cove, Bakersfield, or Mesa Verde.

Have any questions or concerns? You know where to reach me!

480-867-5309 | best_real_tor@gmail.com



The Buyers Edge



CONVERSATIONS

build trust



COMMITMENTS

earn signatures



CLOSINGS

spark referrals



SUCCESS SUMMIT

Coach's Challenge:

The best agents
implement what they
learn.



Follow me on Instagram

@kristijencks

1. Pick one human strategy 💪
2. Pick one tech tool 🛠️
Automate it. Practice it.
Refine it 🥊💥



SUCCESS SUMMIT

LOURDES MAESTRES

Listings Unleashed: The
Sell-Every-Listing System

WINNING SYSTEMS
WINNING SKILLS



165 Google
Reviews ★★★★★

📍 Listings

166 listings

123 sold



Listings Unleashed:

The Sell-Every-Listing
System



SUCCESS SUMMIT

Lourdes Maestres



2024 CLOSED \$106,238,071

GCI \$2,654,457.87

185 TRANSACTIONS

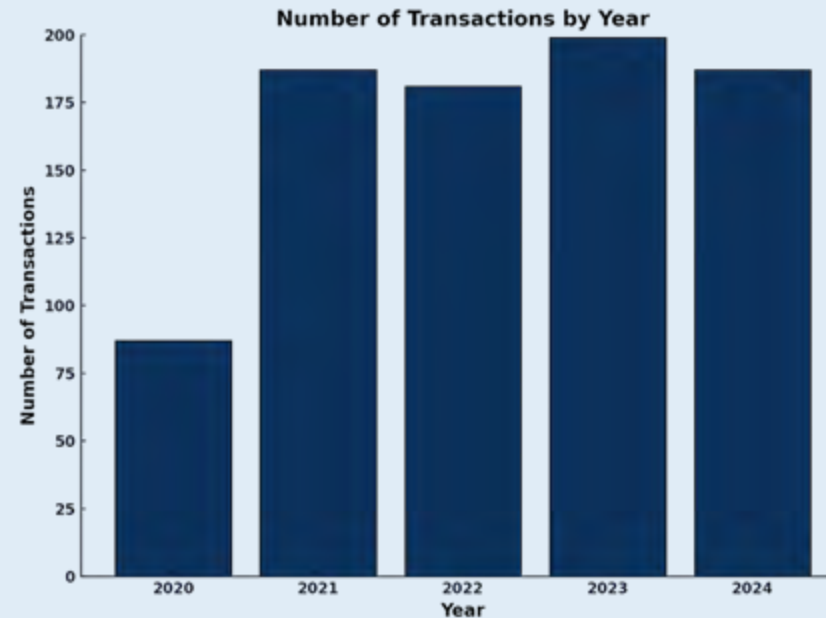
2025 CLOSED \$83,862,790 - GCI \$2,046,882

109 TRANSACTIONS

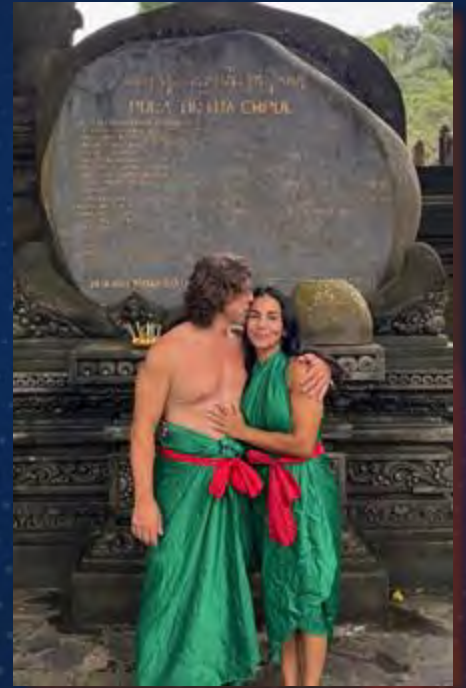
Total listing appointments completed **52**

New listings taken **YTD 50**

Listing sold including listings pending **48**



SUCCESS SUMMIT



3 THINGS I DID DIFFERENT IN 2025

I stopped doing comps – **I started building cases
& went to 88% appt to list**

I went all in on AI to save time

I reverse engineered an “Un-expirable”
marketing campaign





I don't do comps.

I build cases!

BUILD CASES

**THE UNEXPIRABLE
MARKETING PLAN**

UNFIREABLE REPORTS



SUCCESS SUMMIT

Real Estate Life 📞





Sellers Choose **Competence**

BUILDING A CASE

- Understand the data
- Setting expectations
- Learn how to say “NO”

BUILD THE CASE

Hi Brandon, in preparation for our tentative meeting, I have prepared some information for your review

1. Click here to see a complete comparative market analysis www.compass.com/listing-presentation/view/cma/cma-611c380f-d99c-4370-b2a9-dda879708947/v/version-1745267057
2. Important statistics
 - Broward County currently has 1,012 single-family homes on the market priced between \$500K-\$600K.
 - In the last 30 days, 140 homes in that price range have sold.
 - This translates to a **7-month supply**, indicating a buyer's market, but with steady demand still present.
 - **Lauderhill** has 117 single-family homes currently listed, ranging from \$149K to \$899K.
 - Of those, 31 homes are listed between \$500K-\$600K.
 - Over the last 30 days, 12 single-family homes have sold in Lauderhill, ranging from \$335K to \$655K.
 - **6 of those sales were in the \$500K-\$600K range**, meaning half of the recent activity is right in your target range, which is a very positive sign for your price point.

I look forward to meeting you and Danielle this weekend

Thanks



**The agent who builds the
case earns the listing**



**STOP doing comps.
And start Building
CASES!**



2. “**Marketing** is the
ultimate competitive
advantage”

3 Questions:

1. Who's responsible?

2. What are you willing to do?

3. By when?

MARKETING PREP PLAN

WEEK 1

TRANSACTION COORDINATOR	MARKETING	AGENT	ISA
Private exclusive data entry	Reverse prospecting calls to leads	Provide dates to the TC Department	Reverse Prospecting for clients in Real Scout
Book media package	Reverse prospecting text to leads	Staging consultation	Circle Prospecting in Mojo
Features list	Reverse prospecting email to leads	Provide showing instructions	Invite neighbors to the open house
Zillow Showcase \$1M+	Create a text template for brokers open	Provide raw walkthrough video	Create MLS list top 100 brokers
Video \$500k+	Create a text template for open houses	Select a date for a broker open	Text 100 top brokers
Book custom video \$3M+	Coming soon 30 sec video	Provide 4 point / Wind mid	
Update system brokers open	FB & IG ad - images	Select a date for open houses	
Floor plan for all homes \$500k	Work on video editing	Provide targeted audience	
Assist collecting additional documents	Provide digital performance report	Provide list of features	

MARKETING LAUNCH PLAN

WEEK 2

TRANSACTION COORDINATOR	MARKETING	AGENT	ISA
Compass coming soon data entry	Compass video promotion	Reverse prospecting database	Text targeted buyers - 75% score
Notify marketing media available	60 second video	Review and approve video	Send a batch of emails weekly
Active on the MLS - Notify Marketing	90 second video	Review and approve video	Reverse prospecting 20 people
Create weekly sellers report	Long form home tour 3-6 min	Review and approve video	Circle prospecting 20 people
Download weekly digital performance report	Post on google my business	Provide feedback for any and all showings	Provide report to listing agent
Download showing time report	Create Deal of the week design	Review and approve letter	Handle incoming sign calls
Email the seller all reports	Facebook ads - 30 second video	Call the seller	Handling incoming online lead calls
Coordinate showings appointments	Instagram ads - 90 second video	Report all activity to the team	Report daily activity calls

WHO? WHAT? WHEN TRACKER

TC DEPARTMENT

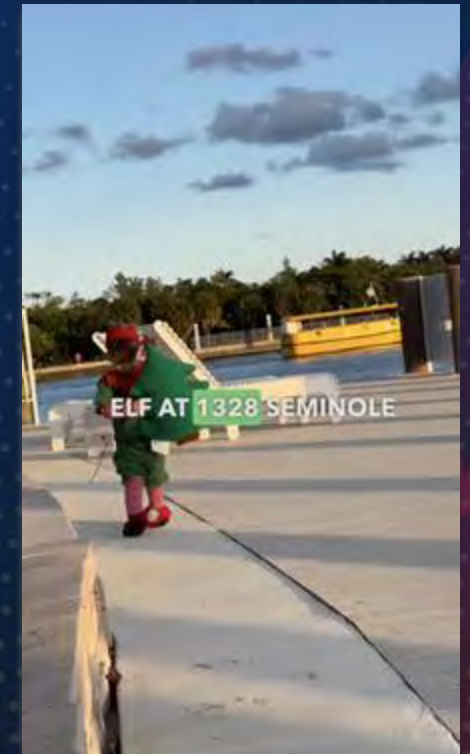
MARKETING

LISTING ADDRESS - SIGNED	STATUS	TARGETED AUDIENCE	PRICE	LISTING TYPE	DATE LAUNCH COMPASS CS	COMPASS CS 30 SEC VIDEO	DATE/ VIDEO	MPH NEWSLETTER	DATE/ NEWSLETTER
919 32nd St West Palm Beach, FL 33407	Private exclusive	Investor	\$399,000	NON LUXU...	7/23/2025				
360 NW 28th Ave Fort Lauderdale, FL 33311	Private exclusive	Investor	\$340,000	NON LUXU...	7/23/2025				
317 NE 5th Ct Dania Beach, FL 33004	Active	All buyers	\$1,700,000	NON LUXU...	7/17/2025	DONE	7/18/2025		
19415 NW 33RD CT, Miami Gardens, FL 33056	Active	Investor	\$499,000	NON LUXU...	6/27/2025	DONE	7/11/2025		
2701 N Ocean Blvd #18A, Fort Lauderdale, FL 33308	Active	2nd Ho...	\$710,000	NON LUXU...	7/1/2025	DONE	6/16/2025	DONE	6/26/2025
1031 SW 4th ST Fort Lauderdale, FL 33312	Active	Investor	\$850,000	NON LUXU...	5/20/2025	DONE	5/22/2025	DONE	5/29/2025
2343 SW 15th Pl Deerfield Beach, FL 33442	Active	All buyers	\$385,000	NON LUXU...	4/3/2025	DONE	4/8/2025	DONE	6/19/2025
2171 NE 66th St # 801 Fort Lauderdale, FL 33308	Active	All buyers	\$195,000	NON LUXU...		DONE	6/16/2025		
520 Orton Ave APT 303, Fort Lauderdale, FL 33304	Active	2nd Ho...	\$479,999	NON LUXU...	1/28/2025	DONE	6/16/2025	DONE	7/17/2025
7300 Lake Cir Dr # 401 Margate, FL 33063	Active	All buyers	\$179,000	NON LUXU...	6/24/2025	DONE	6/16/2025		
450 N Federal Hwy #104N, Boynton Beach, FL 33435	Active	All buyers	\$475,000	NON LUXU...	4/28/2025	DONE	6/4/2025		
350 N Federal Hwy #104S, Boynton Beach, FL 33435	Active	All buyers	\$475,000	NON LUXU...	4/28/2025	DONE	6/4/2025		
4143 N Ocean Blvd #211, Fort Lauderdale, FL 33308	Private exclusive		\$350,000	NON LUXU...					
3200 Port Royale Dr N #2011, Fort Lauderdale, FL 33308	Private exclusive	All buyers	\$589,000	NON LUXU...	9/2/2025				
2481 SE 15th St, Pompano Beach, FL 33062	Private exclusive	All buyers	\$1,488,000	LUXURY	8/12/2025	DONE	6/25/2025		
9579 NW 26th Pl, Sunrise, FL 33322	Under contract	Investor	\$349,000	NON LUXU...	7/8/2025	DONE	7/7/2025		
10568 E Clairmont Cir Unit 303, Tamarac, FL 33321	Under contract	55 +	\$159,999	NON LUXU...	5/8/2025	DONE	6/4/2025		
380 NW 48th Ct, Oakland Park, 33309	Under contract	First tim...	\$499,000	NON LUXU...	5/2/2025	DONE	5/12/2025		



SUCCESS SUMMIT

1 LISTING - 5 VERSIONS



INSTAGRAM POSTS

PRICE IMPROVEMENT!



**WE CAN'T SHARE ALL THE
DETAILS...**

**BUT WE CAN TELL YOU THIS STUNNING HOME
GOT A PRICE IMPROVEMENT!**

**PACKED WITH
FEATURES YOU'LL
LOVE**

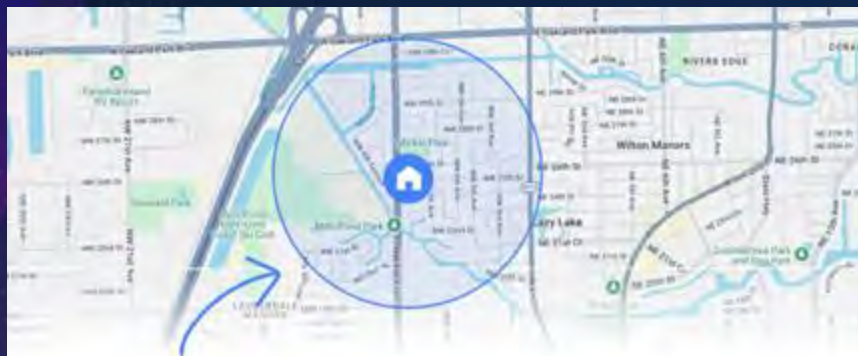
- **12,651 sqft lot** – plenty of space to enjoy!
- **2,000 sqft dock with a boat lift** – perfect for water lovers.
- **Private isle & quiet cul-de-sac** – ultimate privacy & exclusivity.
- **Near Coral Ridge Yacht Club** – a prime location for yacht enthusiasts.

MPH
LIBRARY COLLECTION

**1328 SEMINOLE DR
FORT LAUDERDALE**



DIRECT MAILER DEAL OF THE WEEK



THIS DEAL IS BANANAS! AIRBNB DREAM BUNGALOW.

The Banana Bungalow Airbnb at 801 NW 24th St, Fort Lauderdale is the talk of the town:

- 150% more views on Zillow Showcase – expertly marketed for maximum exposure.
- High demand – more showings than usual.
- Multiple offers already on the table.

Why does this matter?

This bananas-level attention shows the power of hiring the right agent to make your property stand out in a competitive market. Whether it's a one-of-a-kind theme or luxury features, buyers are ready to pay a premium when your home gets the spotlight it deserves.

Want to know how much your home could be worth with expert marketing?

If yes, text me at (954) 833-0933.
I look forward to hearing from you.

Warm regards,

Lourdes Maestres
Real Estate Advisor
The MPH Team
Principal / Compass Florida



**FOLLOW ME ON
INSTAGRAM:**

@lourdesmaestres

Let's Become Unfireable!

DO NOT GET FIRED

1

Showing activity &
Feedback

4

Any Highlights : Seller's credit,
cash,furniture included, investor or end
user

2

Open house activity

5

Marketing efforts

3

Statistics

6

Recommendations

PRICE REDUCTION – DO NOT FIRE ME REPORT

Subject: Discussing Next Steps for 1328 Seminole Dr

Dear Mike and Joan,

I hope this message finds you both well. As discussed yesterday, we are approaching the expiration of our listing agreement, I wanted to discuss potential next steps.

When we began, I recommended listing your home at **\$7.2 million**. However, we agreed to test the market at a higher price. Since then, we've observed that only 3 comparable waterfront single-family homes have sold in East Fort Lauderdale, contributing to a **15-month supply**.

The current market conditions and our pricing strategy have limited buyer interest.

Given these factors, I recommend adjusting our listing price to align more closely with current market comparables and extending our agreement to March 31st 2025.

Below, you'll find a summary of all the marketing efforts, showing activity, and market statistics related to your property.

- Zillow listing showcase, premium package : [YOUR HOME ON ZILLOW SHOWCASE](#)
- **Broker's Open - June 15:**
 - Successfully hosted with over 20 attendees.
 - Invitations distributed via 100 text messages, 100 emails, and 100 outbound calls

Broker's Open During Boat Show:

- Low activity noted due to competition with larger events hosted by other properties.

Networking and Exposure:

- Promoted at the Sports and Entertainment Division events in NYC (September 2024), providing exposure to 90 top brokers nationwide.
- Included in a company-wide Compass email distributed to 35,000 brokers nationwide

Digital Marketing Performance:

- Featured in our newsletter reaching 7,000 buyers/sellers with a 35% click rate.
- Multiple Social media post - paid ads
- YouTube Advertising:

- Price comments
- Brokers opinion
- Networking efforts
- Digital marketing performance



All inside Revii

“

What would your business look like if you never lost another listing – AND NEVER GOT FIRED AGAIN?



I don't do comps.
I build CASES!

@lourdesmaestres




Let's build cases together

TOM FERRY

A Modern, Optimized Repeat and
Referral System! (Dig the Moat!)

WINNING STRATEGY
WINNING MARKETING





“I only invest in businesses
with an **obvious moat**
around them”

- Warren Buffet



“Is there a moat
protecting your most
valuable business asset?”

(your past clients, sphere, prospects?)



80%-90% of consumers

say they'd work with their same agent again.

The challenge

**Only 1 in 5 homeowners
use their same agent
again**

Why?

**It's hard to build a
meaningful relationship
that lasts 6 – 10+ years**





**HERE'S WHAT WE
ALL KNOW...**



1.

Everyone's going after your
clients, ***aggressively!***



2.

Your clients are bombarded with information. But they're ***short on personalization!***



3.

You're marketing to
past clients

like they're leads (if at all).



4.

Five %

(before referrals)



WHAT'S OUR GOAL:

**Never let your *client*
become another
agent's lead!**



***“We must dig a big A\$\$
moat around
your business!”***



WHAT'S THE MISSION:

Never let your *client*
become another
agent's lead!



Problems to

SOLVE



1.

You're database is a mess.

(and you're losing a fortune because of it)



Incomplete data limits
your ability to communicate
& market effectively



The critical 6

1. Name

2. Address

3. Cell

4. Email

5. Home




Anniversaries

6. Birthdays

Database Case Study

8 Agents/Teams, 500,000 Database Contacts...

Missing Information

-  1. Mailing addresses: **250K**
-  2. Email addresses: **125K**
-  3. Phone numbers: **70K**



Database Case Study

What the audit revealed...

Listings sold in your database by other agents!

1. LOST listings sold: **5,161**
2. LOST listing volume: **2.57 Billion**
3. LOST listing commissions: **\$50 - \$70M**



HERE'S THE TRUTH:

Those clients **HAVE**
become other
agents' commissions!
(including some of yours)



PROBLEMS.



2.

How do we maintain meaningful,
valuable, memorable business
relationships *over 6 to 10+ years...*



What's the ***L.T.V.*** of a
great client?



**Be clear, an occasional
newsletter and sold card
isn't enough!**



LET'S LOOK INTO
THE FUTURE



How many buyer sales have you had in the last 10+ years? >>>

1. # of buyer sales in the last decade (approx.) = _____
2. What's the value of those homes today = (approx. total) \$ _____
3. Assume 5% sell = _____ (approx.) transactions
4. What's the volume on those trans. (approx. total) = \$ _____
5. How much in commission potential \$ _____



IS THAT WORTHY OF A
STRATEGY CHANGE?



PROBLEMS.



3.

**Bigger databases.
Making it hard to know
*where to focus.***



So, we continue to
spray & 🙏



4.

***We continue to market
to our clients, like
they're prospects.***





**HOW DO WE
SOLVE THIS...**



1

We must ***enrich*** your
database.



2

Identify who's most
likely to sell &
gain agreement early.



3

**We execute on a long-term
education & "Top Of Mind"
relationship plan.**





**If we're listening
to Buffet &
our clients...**

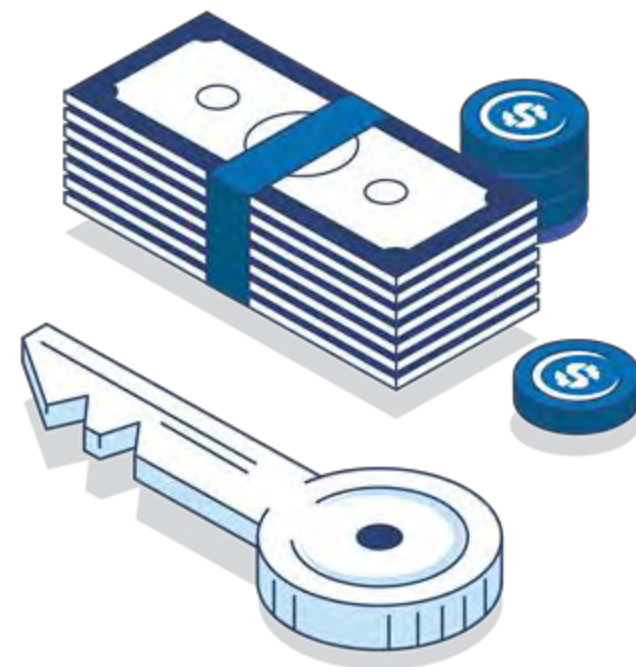


Meet your clients where they are
and deliver the value THEY want.

88% **interested in a monthly update on their value and pricing trends in the neighborhood.**
(Only 17% currently receive it)

62% **are very/extremely interested in a secure app with a dashboard where they could store everything related to the home and contact their agent any time with house related questions.**

44% **said the effort needed to maintain a home was more than they had expected.**



4

Give your clients
(& some prospects) **a tool to**
manage their home.



Push a button, magic happens!



“The end of the transaction
is the beginning of *the real
relationship.*”



What's a modern plan to

**MAINTAIN A HEALTHY
BUSINESS RELATIONSHIP
& STAY TOP OF MIND? T**



**Jason, create the ideal
communication & T.O.M.
plan using AI.
(w/ "prompts" to customize)**



Optimal monthly T.O.M. plan for your clients

(multi-modality, video, text, email, call, mail)

Market report – Monthly

Value report – Quarterly

Community report – Weekly

Maintenance report – Quarterly

Market report (options)

- By zip code
- Homes with pools
- Average by beds/baths
- Proximity to schools
- Type of homes (mid-century)
- New construction updates
- Condos



What's the optimal monthly T.O.M. plan for your clients

(multi-modality, video, text, email, call, mail)

Market report – Monthly

Value report – Quarterly

Community report – Weekly

Maintenance report – Quarterly

Value report

- Your home's value
- Equity report



What's the optimal monthly T.O.M. plan for your clients

(multi-modality, video, text, email, call, mail)

Market report – Monthly

Value report – Quarterly

Community report – Weekly

Maintenance report – Quarterly

Community report (options)

- “here’s what’s going on this weekend in (city)”
- “here’s what’s happening this month”
- Real estate changes (new zoning, new projects coming soon, new policy)



What's the optimal monthly T.O.M. plan for your clients

(multi-modality, video, text, email, call, mail)

Market report – Monthly

Maintenance report

Value report – Weekly

Community report – Weekly

Maintenance report – Quarterly



**+ KNOWING YOU
& YOUR CLIENTS.
*WHAT ELSE?***



- 1. Community events.**
- 2. Invitations to charities.**
- 3. Client events.**
- 4. Client parties.**
- 5. See and be seen!**

(how we REALLY maintain relationships)





Sounds great TF.
What's the catch?



GOOD NEWS, EVERY YEAR...

we do something new,
for our coaching members...
a new value to improve the
quality of your business...



We asked our selves, “could we find...

1. A solution that enriches your database.
2. That tells you “who’s most likely” to transact.
3. Tech that provides value for your clients...
4. While eliminating a few others you pay for.
5. A single sign-on to make it easier for you/asst/marketing to manage.



***Eliminating the need for HomeBot, HomeActions,
HomeKeeper, Move GURU, Updater, My Home IQ,
Curaytor, Zillow's monthly automated Zestimate
to name a few.***



A new partnership TF coaching members + *live* inHere



Smarter home management for them, *smarter business for you*

Investment goes both ways.
They get a home hub, you get
deeper insights.



Enrich (clean up) your customer database with
property intelligence



Engage homeowners with touchpoints (T.O.M.)
and hubs to generate activity (automatically)



Get prioritized “most likely” daily, delivered to
your inbox or CRM





***But Tom... I've seen this before.
I don't have time to call them all,
besides, they may be too early in the
process. So, I'll get to them later.***



***“You’re losing so slowly,
you think you’re winning”***

Gary Keller



YOU'RE GONNA THIS...

I asked Jimmy to develop the ultimate
“most likely to sell campaign”
to add into Break Through Broker or your CRM 

**We've partnered with
Matthew Ferry to teach you
the ideal biology, client
psychology, and dialogues
*to win!***




Together, we can shift
from being transactional
to working H.U.M!

"Homeowners Under Management"



*Just like your insurance broker,
stockbroker, the best title & escrow
officers, even your doctor.
You're now creating an
annuity business!*





“I only invest in businesses
with an **obvious moat**
around them”

- Warren Buffet



btw, GEO-FARMERS!

This is 🍌 's for *digging*
the moat & killing
competitors





Okay, I'm in Coaching.
How much?



**I'm covering
coaching members
for first 18 months.**

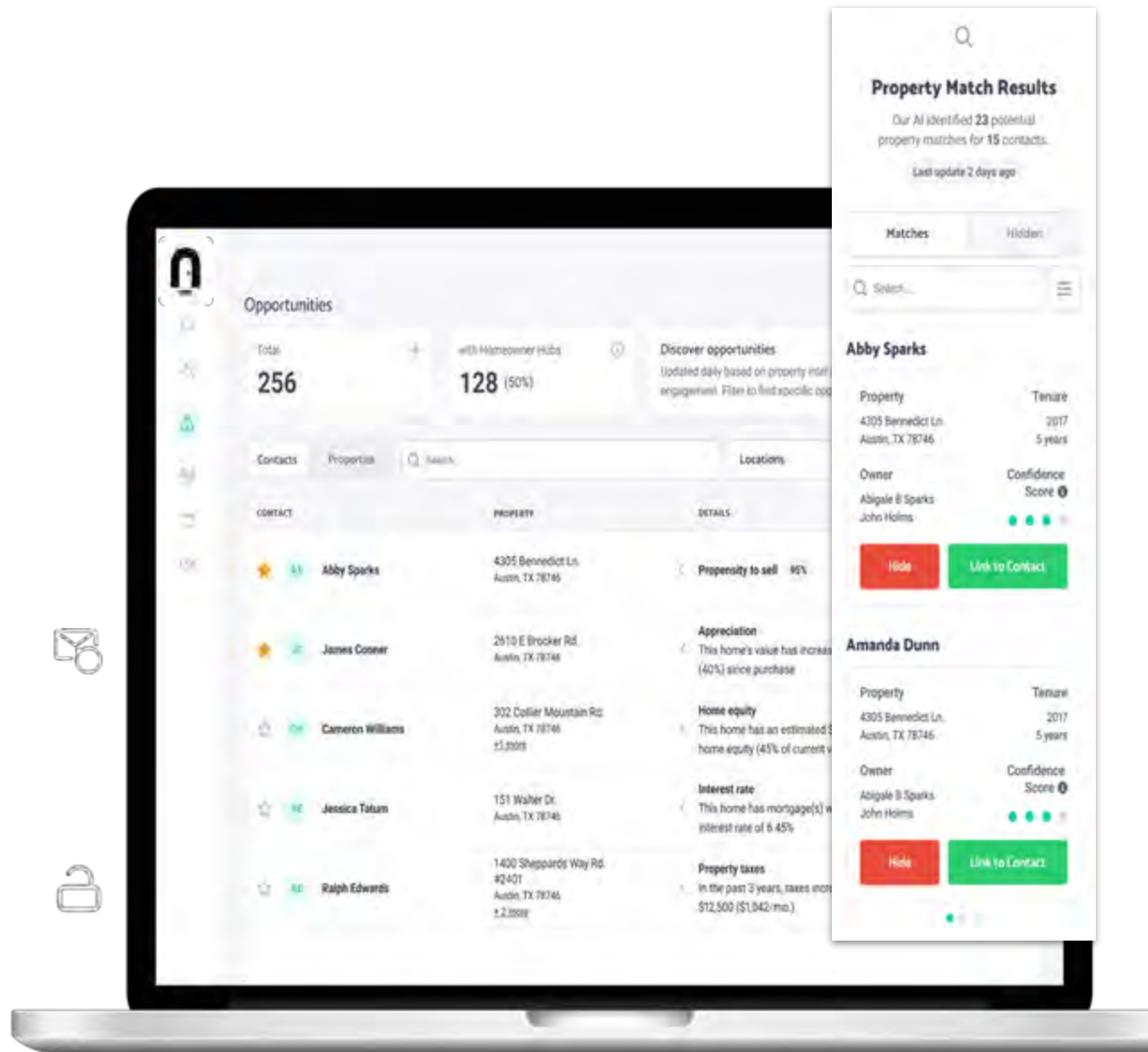




Sounds great TF.

What's my next step?





Start onboarding here.



live inHere®



Just *DOOOOO!*





**OBVIOUSLY, MANY OF
YOU CAME HERE WITH
THE INTENTION TO JOIN
US.**



BE FIRST.
BE FÅST!



One last thing...

*(what time tmrw at
8:15am do we start? 🤔)*

