



The 3 Pillars of a Successful Agent

Module 1 — Track activities and metrics (dashboard you can build today)

Core metrics to track (daily/weekly/monthly):

- **Conversation attempts; Conversations; Appointments set; Appointments met; Offers written; Offers accepted; Closed transactions; Average price point; Buyers vs sellers; Total commission earned.**

Suggested dashboard columns (spreadsheet/CRM):

- Date | Lead source | Attempts | Conversations | Appt set | Appt met | Offer written | Offer accepted | Close date | Sale price | Commission | Buyer/Seller | Notes

Benchmarks & conversion focus:

- Track **appointment**→**listing** and **listing**→**close** conversion rates monthly; use rolling 12-month averages to spot trends.
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Module 2 — Entity structure: LLC + S-Corp election (practical guide)

- **Why form an LLC first:** separates personal assets and creates a business entity.
 - **Why elect S-Corp (tax reason):** allows splitting income into **reasonable salary** (subject to payroll taxes) and **distributions** (not subject to FICA), often reducing self-employment tax when net income is high enough. **Typical breakpoint:** consider S-Corp when net income is roughly **\$60k–\$80k+**, but run the numbers with a CPA.
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Module 3 — Commission allocation & cash-flow plan

Core rule: Deposit every commission check into your business bank account first. From there, allocate funds into dedicated sub-accounts so money is managed before it's spent.

Allocation framework (practical rule set)

1. **Deposit full commission into Operating / Business Checking.**

2. **Immediately allocate** each commission into sub-accounts using percentages you and your CPA agree on. Typical starting allocations:
 - **25%** → **Tax Account** (estimated taxes and payroll taxes).
 - **15%** → **Business Spending Account** (marketing, tools, transaction fees).
 - **Salary** → **Payroll/Salary Account** (monthly salary amount determined with your CPA).
 - **Remaining** → **Savings/Reserve Account** (build runway and reserves).
 3. **Reserve target:** Build **6 months of combined salary + business costs** in Savings/Reserve before changing allocations or taking extra distributions.
 4. **Quarterly distributions:** After the 6-month reserve is met, take **quarterly distributions** from the business account. Distributions are typically taxed at lower rates than payroll withholding when structured correctly, coordinate timing and amounts with your CPA.
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Example Commission income: \$100,000

- **Taxes (25%)** = \$25,000 → Tax Account
- **Business spending (15%)** = \$15,000 → Business Spending Account
- **Salary (50%)** = \$50,000 → Payroll/Salary Account (paid monthly)
- **Savings (10%)** = \$10,000 → Savings/Reserve Account

Lead Generation Pillar

Lead generation is the **lifeblood** of an agent's business. It is the highest-value activity and must be the **number one daily priority**. This pillar teaches what to do, where to spend time, how to measure results, and how to allocate effort across three distinct lead buckets.

Three Lead Buckets

Bucket	Who it is	Typical activities	Key strength
SOI (Sphere of Influence)	People who know, like, and trust you: friends, family, past clients, referral partners	Personal outreach, client appreciation, referral asks, events, newsletters	Highest conversion and lowest cost
Prospecting	People who don't know you yet in your local market	Open houses, circle prospecting, door knocking, neighborhood farming, FSBO outreach	Builds local presence and listings pipeline
Online Lead Generation	Internet users searching or responding to ads	Zillow, Realtor.com, Facebook ads, Google Ads, landing pages	Scalable volume but requires CRM discipline and ad skill

Daily Priority and Time Allocation

- **Rule:** Spend your best hours on lead generation first, before admin or low-value tasks.
 - **Adjust allocation** based on where your current business comes from and ROI: increase time where conversion and pipeline are strongest.
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Track Where Business Comes From

Essential tracking fields to add to your CRM for every lead and closed transaction:

- **Lead source** (SOI / Prospecting / Online + specific channel)
- **Date first contacted**
- **Conversation attempts** and **conversations**
- **Appointment set** and **appointment met**
- **Offer written** and **offer accepted**
- **Close date** and **sale price**

Monthly review: Calculate % of closed business from each bucket and conversion rates for each stage. Use that to reallocate time.

Benchmarks and Conversion Metrics to Monitor

- **Conversation attempts** → **Conversations** (contact rate)
- **Conversations** → **Appointments set** (appointment rate)
- **Appointments set** → **Appointments met** (show rate)
- **Appointments met** → **Offers written** (offer rate)
- **Offers written** → **Offers accepted** (acceptance rate)
- **Offers accepted** → **Closed transactions** (close rate)
- **Average days to close** and **average price point** by bucket

Track these by bucket to see which activities produce the best ROI.

SOI Playbook

- **Daily actions:** 10–20 personalized touches (calls, texts, handwritten notes, value emails).
- **Weekly actions:** 1 value email or newsletter; 1 small event or client appreciation touch.
- **Quarterly actions:** Client appreciation event; referral campaign.
- **Script starter (call):** “Hi [Name], it’s [You]. I was thinking about you and wanted to share a quick market update for your neighborhood—do you have 30 seconds?”
- **Follow-up sequence:** Immediate thank-you; 7-day value email; 30-day check-in; 90-day referral ask.

Prospecting Playbook

- **Open houses:** Use as a lead capture and follow-up engine—collect contact info, schedule same-day follow-up calls, and tag source in CRM.
 - **Door knocking / circle prospecting:** 2–3 hour blocks; script for value (market update, neighborhood report); always leave a branded leave-behind.
 - **Farming:** Monthly mailer + quarterly door knock + local events + tracked offers to homeowners.
 - **Script starter (door knock):** “Hi, I’m [Name] with [Brokerage]. I’m doing a quick neighborhood update—have you seen recent sales on [Street]? I’d love to share what that means for your home.”
 - **Follow-up:** Add to a 12-month nurture cadence in CRM with value touches.
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Online Lead Generation Playbook

- **Prerequisite:** Only scale online lead spend once you have a **CRM follow-up system** and a tested nurture sequence. Online leads require immediate, systematic follow-up.
 - **Immediate actions on lead capture:** Send instant SMS/email; call within 5–15 minutes; create a task in CRM for next steps.
 - **Nurture sequence:** Day 0 call + SMS; Day 1 value email; Day 3 call; Day 7 market update; ongoing weekly value touches for 90 days.
 - **Ad basics:** Start small, test one channel, measure cost per lead and cost per close, then scale winners.
 - **Quality control:** Tag lead source and campaign in CRM; measure lead→close conversion before increasing spend.
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Weekly and Monthly Routine

Weekly (example):

- Monday: 2 hours SOI outreach; 2 hours prospecting (open house prep/door knocking).
- Tuesday: 2 hours online lead follow-up; 1 hour CRM cleanup.
- Wednesday: 2 hours SOI touches; 2 hours prospecting.
- Thursday: 2 hours online testing/ads; 1 hour market content creation.
- Friday: 1 hour review metrics; 1 hour planning and pipeline calls.

Monthly:

- Review source attribution and conversion rates.
- Reallocate time based on last 90 days’ performance.
- Run one test (new script, new ad, new farming piece) and measure results.

Practical exercises for training

1. **Source Audit (30 minutes):** Export last 12 months of closed deals, tag each by bucket, calculate % of business from each bucket.
 2. **Time Allocation Drill (20 minutes):** Based on the audit, create a weekly schedule that dedicates time proportional to where your business comes from, plus 10% testing time for new channels.
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Common mistakes and how to avoid them

- **Mistake:** Treating online leads like SOI leads. **Fix:** Use faster, more persistent follow-up and different messaging.
 - **Mistake:** Not tracking lead source. **Fix:** Enforce a CRM rule: no lead saved without a source.
 - **Mistake:** Spreading time too thin across many tactics. **Fix:** Focus on 1–2 high-ROI activities and test one new tactic at a time.
 - **Mistake:** Ignoring conversion metrics. **Fix:** Track conversion rates at each stage and optimize the weakest stage first.
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Quick templates to copy into CRM

- **SOI initial message:** “Hi [Name], quick market update for your area—would you like a 60-second summary?”
- **Open house follow-up:** “Thanks for stopping by [address]. I’d love to learn what you’re looking for and share similar homes—are you available for a quick call?”
- **Online lead immediate SMS:** “Hi [Name], this is [You]—thanks for your inquiry on [site]. I can help—what’s the best time to talk today?”

Pillar 3 Follow Up

Follow up is the engine that turns past clients into repeat business and referrals. The goal is consistent, value-first contact that keeps you top of mind and useful. Use a mix of **automated drips**, **personal calls**, **timely mailers**, and **client events** so every past client receives the right touch at the right time.

Accounts and cadence

Core cadence

- **Automated email drip** — ongoing weekly or biweekly value content for 6–12 months, then monthly.
- **Quarterly phone call** — value call (vendor help, market update, seasonal tips).
- **Annual tax docs call** — every January offer closing docs for tax prep.
- **Event touches** — 1–2 client events per year (movie night, community cleanup, truck rental day).
- **Trigger touches** — home warranty expiration, interest rate drops, neighborhood sales, birthdays, move-in anniversaries.

Touch mix per year (example)

- Email touches: 12–24
 - Phone calls: 4 (quarterly)
 - Mailers: 4 (seasonal or targeted)
 - Events: 1–2
 - Triggered outreach: as needed
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Follow up account types and examples

Automated email drip

- **Purpose:** stay useful and educational; drive referrals.
 - **Sample sequence**
 - Day 0: Welcome + homeowner checklist.
 - Day 7: Local market snapshot.
 - Day 30: Seasonal maintenance tips.
 - Month 3: Vendor list offer.
 - Month 6: Home value check-in.
 - Month 12: Closing docs offer for taxes.
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Mailer example TPMCO mailer template

TPMCO Mailer

- **Top line:** Neighborhood Market Snapshot
 - **Personal note:** “Hi [Name], quick update on recent sales on [Street].”
 - **Points:** Recent sale prices; average days on market; one tip to increase home value.
 - **Call to action:** “Call me for a free copy of your closing docs for tax filing.”
 - **Offer:** Free vendor list or home warranty check.
 - **Signature:** Photo, name, phone, website
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January closing docs campaign

Purpose: Provide value and create a tax-season touchpoint that prompts calls and referrals.

Steps

1. **List** all clients who closed in the prior year.
2. **Scripted call:** “Hi [Name], it’s [You]. I’m calling to offer a copy of your closing documents to make tax filing easier—would you like me to email or mail them?”
3. **Follow up:** If no answer, leave a voicemail and send an email with the offer.
4. **Log** every contact and outcome in CRM with tag “TaxDocs2026.”

Email subject lines

- “Your closing docs for tax season”
 - “Need your closing paperwork for taxes?”
 - “Quick tax-season offer from [Your Name]”
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Client event ideas that convert

- **Movie night** — low cost, family friendly, invite past clients and their friends.
- **Truck rental day** — sponsor a truck for clients to haul items to the dump; provide refreshments.
- **Vendor fair** — invite vetted contractors and service providers; clients get direct access.
- **Seasonal party** — summer BBQ or holiday open house for clients and referrals.

Event follow up: Send photos, thank-you notes, and a short survey. Tag attendees as “EventEngaged” in CRM and follow up with a personal call.