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Real Estate Business Institute

# Real Estate Business

For Real Estate Professionals



It's All  
About  
the  
**JOURNEY**

JOHN D. MAYFIELD  
2019 Hall of Leaders Award Recipient

**PLUS**

Tips

for a

**More Effective**

**Year-End REVIEW**



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## PRESIDENT'S Message



Debora Weidman-Phillips ABR®, CRB<sup>SM</sup>, GREEN, SFR

### Growth and Comfort

Our 2020 Operating Plan begins with a quote from Ginni Rometty:

“Someone once told me growth and comfort do not coexist. And I think it’s a really good thing to remember.”

My experience as this year’s President of REBI has evoked similar feelings. For 365 days, my priority has been to provide a context and an environment for the Institute’s directors to make appropriate decisions. I share this charge with all of REBI’s presidents – those who preceded me and those who will follow. Effective stewardship recognizes the past, measures its impact on today’s decisions and also accepts that tomorrow will be filled with possibilities not imagined today.

When I began my service as president of REBI, I never imagined the year would pass so quickly. As an organization, we are stronger than ever. For that, I first have you, the membership, to thank. The ideas, energy and time you contribute make REBI a powerhouse. We are also fortunate to have an outstanding staff, working under the leadership of Ginny Shipe, CAE, C-RETS, RENE. Ginny and her teams have helped the Institute strengthen its educational offerings, forge new global alliances with talented partners, encouraged us to innovate, and managed us into continued fiscal good health. The combination of committed members and excellent staff means that REBI will continue to be the source for the leaders of today, as well as a force in developing the leaders of tomorrow.

Your organization is nearly 27,000 members strong! And, during the first nine months of the year, we delivered 1,445 courses to 6,995 students throughout North American as well as in Panama, Serbia, Romania, Dubai, and Macau!

In the months and years ahead, the Institute’s efforts will be devoted not only to preserving what we have already achieved, but also in identifying and exploiting new opportunities as fully as possible. We are positioned for long-term growth with a multi-dimensional strategy that focuses on optimizing partner relationships, building knowledge outlets, aggressively exercising our intellectual property, and leading the industry in business training.

I have been truly blessed with the opportunity to serve the Real Estate Business Institute. I have friendships and experiences that will last a lifetime. Our leadership and volunteers will continue to make the magic happen!

Sincerely,

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# A SPECIAL EVENT

Honoring Our Leaders



**Congratulations, John!**

**Debora Weidman-Phillips (2019 President)**

**John D. Mayfield  
(2019 Hall of Leaders Award Recipient)**

**Ginny Shipe (CEO)**

**2019 Hall of Leaders Award Recipient  
John D. Mayfield**

**Presented by Barbara Schmerzler, FIABCI-USA  
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**Ginny Shipe (CEO)**

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# 2019 Inaugural & Awards Reception

**Bette McTamney (2015 REBI President and  
2018 Hall of Leaders Recipient)**

**Installing James L. Helsel, Jr. as the 2020 President  
of the Real Estate Business Institute (REBI)**



**James L. Helsel, Jr., installed as 2020 REBI President**



**Bette McTamney (2015 REBI President and  
2018 Hall of Leaders Recipient)**

**James L. Helsel, Jr. (2020 President)**

**Debora Weidman-Phillips (2019 President)**



# A SPECIAL EVENT

Honoring Our Leaders



**2019 President, Debora Weidman-Phillips installs Candy Cooke as 2020 President-Elect, and Jody O'Brien as 2020 First Vice President.**

**James L. Helsel, Jr. (2020 President)  
Adorna O. Carrol (2016 REBI President)  
Cathy Whatley (2003 NAR President)**



**James L. Helsel, Jr. (2020 President)  
Rich Hart (2019 Distinguished Educator Award Recipient)  
Debora Weidman-Phillips (2019 President)**

# 2019 Inaugural & Awards Reception

## Our 2020 Leadership Team

**Jody O'Brien, First Vice President**

**Candace Cooke, President-Elect**

**James L. Helsel, Jr., 2020 President**

**Debora Weidman-Phillips, Immediate Past President**

**Ginny Shipe, Chief Executive Officer**



**Rich Hart (2019 Distinguished Educator Award Recipient)**

**Maria Cardenas, REBI Vice-President  
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**2020 Leadership Team with  
2019 Distinguished Educator Award Recipient**



2019 Inaugural & Awards Reception

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the new member benefits  
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of your membership!

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2019 Hall of Leaders Award Recipient

# John D. Mayfield

Thrown some serious career curveballs,

## It's ALL About

this year's Hall of Leaders inductee pursued

## The JOURNEY

every opportunity to grow—  
and ended up thriving.

G.M. Filisko

John D.  
Mayfield

## It's All About The JOURNEY



John Mayfield's life has not gone as planned—and, boy, is he grateful for that.

Mayfield went from running a successful real estate company in Farmington, Mo., to operating a successful blueberry farm, and then accepting an offer to become a bank executive.

Suddenly, in 2009, through no fault of his own, it all fell apart. Mayfield was forced to start over, rebuilding a career he'd thought was on solid footing.

Today, Mayfield, who holds the ABR, CIPS, CRB<sup>SM</sup>, C-RETS, e-PRO<sup>®</sup>, GRI<sup>SM</sup> RENE, and SRS credentials and earned his master's degree from REALTOR<sup>®</sup> University in 2015, is a sought-after tech expert and speaker, he leads a respected real estate school, and he sells real estate for life-long clients. And it all happened because of a chance encounter and Mayfield's willingness to try fresh ideas and pursue new opportunities.

## The Family Business Calls

**M**ayfield is an Illinois native, but his parents moved to Southeast Missouri when he was still in diapers. It's in Missouri that Mayfield began his real estate career, helping his mom out at the age of 16 at the real estate company his parents opened and his mom managed. "I started picking up her for-sale signs and taking pictures of properties with a Polaroid camera," he recalls. "What 16-year-old wouldn't want gas money?"

When he was 18, Mayfield's mother piqued his interest with an offhand comment. "My mom said, 'Hey, did you know you have to be only 18 to get your real estate license in Missouri?'"

Still, his dream was to go into broadcasting and film, and off Mayfield headed to college. That was in the late 1970s, however, a time of sky-high interest rates, which made for a very challenging real estate market. "Lots of my mom's agents abandoned ship," he states. "So when I came home from college that summer, I said, 'I can help.' When it came time to go back to school, I hated to leave her. She loved her office so much, and I kind of wanted a break."

Mayfield eventually graduated with his bachelor's degree from Southeast Missouri State University, all the while building a real estate clientele and earning his broker's license in 1980. "I found out how to sell properties in a tough market," he says. "I was making pretty good money for a 19-year-old."



In 1987, Mayfield purchased his mother's company and built it into a three-office brokerage with 40-something agents. That same year, he ventured into teaching, opening a real estate school out of necessity. Mayfield was looking to expand his office, but potential new agents had to drive the hour or so to St. Louis to the nearest real estate school. "I thought, 'Wouldn't it be nice if I could provide real estate courses for the local community?'" explains Mayfield.

"It really opened a whole world to my business," he notes. "If you want to learn something, prepare to teach it. I discovered that I started using what I was teaching. My clout and credibility started to rise because I was talking about these legal terms that I knew how to explain in layman's terms. And I enjoyed teaching."

## How he became the Tech Guy

By the early 1990s, Mayfield was serving as president of his local board, and the question of computerizing the MLS was front and center. “We had this knockdown drag-out fight at a local restaurant—it was a very heated discussion because people didn’t want the computerized MLS; they wanted their MLS books,” he explains. “I wanted to computerize.”

The dispute tapped into another of Mayfield’s skills—technology. The board’s MLS vendor was impressed with Mayfield’s in-depth knowledge of how the system could operate better, and it asked him to travel to local boards and train them to better use their system. Mayfield also began teaching REALTORS® how to use the precursor to today’s mobile phones—the Palm Pilot—and do things like create digital flyers. “It snowballed from there,” says Mayfield. “The technology was coming on strong. I had a real interest in it and, more specifically, how to use it in real estate.”

Articles Mayfield wrote with tech tips caught the attention of people within what used to be

called Hewlett Packard but today is called HP. “They hired me to go to conferences and events, and I’d speak at their booth,” he recalls. “HP was sending me tablets and all its other new equipment, and I’d just get in and try to use them. Then I’d tell others, ‘Hey, did you know you could do this and that?’ That’s how I began to meet people around the country.”

That’s also how Mayfield landed his first book deal. It was in 2003 that he contracted to publish *Five Minutes to a Great Real Estate Sales Meeting: A Desk Reference for Managing Brokers*. It was the first of seven books Mayfield has written (one with a co-author) to help real estate professionals improve their business quickly and effectively.

“That was the same year I applied to become a speaker for the Certified Residential Brokerage Council and first met Ginny Shipe, its CEO,” he says. “I had to do an audition in front of five or six instructors, and they hired me. I got my CRB designation around that time, too.”

## Steadiness through the Storm

With things humming along nicely, Mayfield had no idea he’d learn some difficult lessons and have a chance encounter that would change his life.

“I had this pick-your-own blueberry and blackberry farm I couldn’t sell—that was probably a good sign I shouldn’t buy it,” jokes Mayfield. “But the owner kept saying, ‘You can make a lot of money with this farm.’”

Mayfield became sold on his own listing and literally bought the farm in 2003. In 2006, he was offered a prestigious job at a local bank, with part of the offer being the purchase of his successful real estate company. Burned out on managing

agents, Mayfield welcomed the move. He sold his real estate company and took the bank job.

The owner of the blueberry farm was right: Mayfield made a lot of money with it, pulling in as much as \$65,000 each summer. That is, until 2007, when a late-Spring freeze creamed the crop. The insurance Mayfield purchased to cover such a loss had a clause buried deep within that precluded recovery if Mayfield hadn’t owned the farm for more than five consecutive years.

That’s OK, he thought. We can limp along until next year’s crop. But that promising bank job? During that rough economy, the bank decided

not to expand. Luckily, Mayfield was able to sell the farm in that difficult market.

Still, Mayfield was suddenly in a precarious career and financial position. “My wife and I didn’t have any idea if we could make it,” he confesses. “We moved to St. Louis. I got involved with the National Speakers Association and did as much speaking as I could. I was also trying to sell real estate, but in 2008 and 2009, there wasn’t much business. Between speaking and selling, I kept my head above water.”

It was a speaking engagement that changed everything for the Mayfields. In 2010, Mayfield

was speaking on technology for brokers at an NAR conference, and the room was silent throughout his presentation. “I thought they hated me,” he admits. “At the end, all of these people stood in line to talk to me, and one of them was this guy from France. He said, ‘I’m bringing you to France to speak.’ I can’t believe I said, ‘Can I bring my wife?’ But he said, ‘Yes, yes!’

“When I went back to my chair, there was an Eiffel Tower key ring on it,” Mayfield recalls. “That man called me two weeks later, and my wife and I got on a plane and flew to Nice. We had \$145 in our checking account—that’s how tough things were for us.”



## The World Stage Awaited

The man was Kirkor Ajderhanyan, the broker-owner of real estate company in Nice who arranged for Mayfield to speak to real estate professionals in France and hired him to consult on technology for his business. The Mayfields traveled to Nice more than once for several-month stays in 2011 and 2012.

“We lived right on the French Riviera when we were going through one of the worst storms in our lives,” Mayfield marvels. “That taught me that even if you think you’re in the deepest, darkest tunnel, there’s always light.”

From that experience, Mayfield began an enduring friendship and launched a career as an international speaker. This year, he spoke

in his 25th country. He also again works at his own real estate company, where he helps the clients who’ve stuck with him for decades. And the Mayfields recently repurchased their much-loved family home 13 years after selling it during their financial challenges.

“What I also learned is that you’re always one person away from someone who can change your life forever,” states Mayfield. “Today, I get to travel and teach. I go out and show properties for my friends. I run this online real estate school that’s now approved in five states. I’ll always be in real estate, but running an office and recruiting and training? I’ve done that. That chapter is in my book, and I’m doing other things now.”

## The Value of REBI

One critical factor as Mayfield rebuilt his career was the CRB designation. “The thing it did for me more than anything was to help me understand as a broker that I wasn’t alone with the trials and tribulations I had,” he states. “The courses and education provided me such valuable information to make better decisions.”

“I remember that when I started going to the CRB Council meetings, I heard Jim Kinney in downtown Chicago jokingly talking about problems with his agents,” remembers Mayfield. “All I could think was, ‘Really? You have the same problems in downtown Chicago that I have?’ I began to really value others’ perspectives on how they handled those problems.”

Mayfield served as the CRB Council’s president in 2010 before it evolved into today’s Real Estate Business Institute, and he’s been an instructor on a range of topics. It’s because of Mayfield’s expertise and commitment to REBI and educating its members that he was inducted into the Hall of Leaders this month at the REALTORS® Conference & Expo in San Francisco.

“When I heard I was being inducted, I thought, ‘Why would they ask me? I’m just a little old broker from Southeast Missouri,’” he says. “Some of those people who’ve earned the award run some major companies. I was honored, and it was humbling.”

The award also recognizes Mayfield’s forward thinking and openness to opportunities. “One day I was sitting on the French Riviera overlooking the Mediterranean Sea while

reading this book on serendipity, and I ran across a quote by Marcus Bach that was so true. It says, ‘The goals you find on the way to the goal you want may be more precious than the goal you seek.’ It’s basically saying to just enjoy today because today’s a special day.

*The thing the CRB designation did for me more than anything was to help me understand as a broker that I wasn’t alone with the trials and tribulations I had. The courses and education provided me such valuable information to make better decisions.*

“I tell my story today, and people come up to me afterward to talk,” says Mayfield. “One lady said, ‘Thank you. I needed to hear that message so much today.’ She held my hands and told me, as she was shaking a little bit, that she’d had a stroke, her husband had left her, she’d lost her home, and she’d lost her 15-year boy in an auto accident the previous year. I thought, ‘My message helped you? I lost only stuff—material things.’

“That’s why I tell my story,” explains Mayfield. “I tell it in almost any environment. I told it in Egypt, and I had ladies come up to me and say, ‘We appreciate hearing your message; we feel like there’s no hope for us, and you gave us hope.’ If I had to do it all again, I wouldn’t change anything.”

---

*G.M. Filisko is a lawyer and freelance writer who specializes in real estate, legal, business, and personal finance topics.*

## It's All About the JOURNEY



### A Trusted Partner By His Side

“She’s been a real rock and support for me,” John Mayfield says of his wife, Kerry. “She likes to be behind the scenes, but she’s always been there, and she has such good wisdom. She was telling me for two years to put my real estate school online, and I didn’t want to. Since I did, it’s been so successful.”

The couple met when they were just out of college, though admittedly the first encounter wasn’t one that made an impression on Kerry. They both happened to be on a canoe float trip, and John chatted Kerry up on the bus home. They went their separate ways, only to later meet again. John said, “Hey, I met you on that float trip two weeks ago.”

“She looked at me like she had no idea who I was and said, ‘Sorry, I don’t remember you,’” he recalls. Two weeks later, Mayfield’s father hired Kerry at the department store he ran.

Fate, apparently. They’ve now been married 34 years and have two adult daughters, Anne and Allie.

“We work together every day,” says Mayfield. “Some people say they could never do that, but I don’t know what it would be like to not be around my wife. She’s my best friend. We’ve been through a lot together, but we’ve always come out on the other side.”

## The Good Guy Who Isn't Finishing Last

**When you ask friends and colleagues why John Mayfield has been successful, they say it comes down to hard work and integrity.**

### Ask to see the Steve Martin impression

There are several things that make my husband John a great leader, one of them being that he never asks anyone to do something he hasn't or wouldn't do himself. He leads by example.

He has a strong moral compass and holds himself and those around him to a higher standard. He also has an innate ability to encourage and bring out the very best qualities in the people he surrounds himself with. You find yourself a better person because of him.

John is kind and generous to a fault. He doesn't mind sharing his ideas with others to bring about a positive outcome. He's hard working, transparent, and positive. He's also a little quirky and likes to have fun. (He does a great Steve Martin impression!)—*Kerry Mayfield*

### The ring that spoke volumes

I think my dad has been successful because he's so self-motivated. He has had this natural drive to be successful, and he's constantly thinking positively. Everything he puts in, he has received that in return and more. He's never afraid of messing up or being embarrassed.

I think that's why this award is so fitting for him. He has always been a leader, a teacher, a friend to many, and an amazing father.

My dad's constant flow of ideas and his willingness to share and encourage people is what has made him so well respected around the world. Every meeting I go to with him, people tell me how much they like him and how great a teacher he is.

One meeting we went to, he wanted to go say hello to a guy he knew; the guy and I shook hands, and the man squeezed my hand pretty hard, bending a little ring I got when I was in France. When we walked away, my dad promised that when he went back to France, he'd get me another one. About a year later, he

went to Nice for a business trip and FaceTimed me to show me that he found the same little ring, just like my old one.

He was so proud to show me. I couldn't believe he went out of his way to find it. It was more than an hour one way to Saint Paul de Vence on a bus with a million stops! That's the kind of guy my dad is. He goes above and beyond to do things for others no matter if that's showing someone a new app, helping students in real estate school, or giving encouraging words to someone who's struggling.

He's the kind of leader who's going to be remembered for so many things beyond this amazing moment in his life.—*Anne Mayfield*



## What would dad do?

“An enormous part of why my father has been so successful in business and life is his impeccable work ethic, his treatment of others, and his perseverance through whatever obstacles life has thrown at him. I've admired my dad so much for his generous treatment of others. He never seems to meet a stranger and treats everyone with kindness and respect.

He truly is the type of person to give you the shirt off his back, even when he had nothing else. I've seen him go above and beyond to help and take care of others when at times, he could've used the help even more than those he may have been helping. Yet he'll do it with a smile and a happy heart.

I've seen my father overcome obstacles I can't imagine facing. He has powered through them and come out a stronger man, all while never losing his faith.

He's a man I look up to and try to emulate every day. When I'm in a difficult situation, I always find myself asking, “What would my dad do?” and I'll immediately know the answer. Honesty, hard work, kindness, and perseverance are only a few words that help describe the wonderful person my father is.—*Allie Brosch*

## Values that are harder to find today

John's success comes first from his heart. His best values are his very deep human values—integrity, fidelity, love, and passion for humanity before his profession. He gives first before thinking to receive. This is very rare today.

John was already very well known in the United States in many state associations and inside the great NAR family. Then in 2017, he was awarded the FIABCI Medal of Honor, bringing him global recognition. He's one of the most well-known experts on new technologies, education, and training in the global real estate industry. He's a visionary.

Maybe 10 years ago during an NAR convention—John will remember better when and where—I was running from one to another conference hall, and I stopped to listen to a voice. John was giving a conference! Today, we're inseparable even though oceans are between us. But he and his family are in our hearts and minds.—*Kirkor Ajderhanyan, broker-owner, 107 Promenade Real Estate by Keller Williams, Nice, France*

## Sweetness as a strength

To explain John Mayfield, I must quote two sayings that are the core of John's personality:

"No matter how educated, talented, rich, or cool you believe you are, how you treat people ultimately tells all. Integrity is everything."

"I'm not impressed by your money, position, or title. I'm impressed by how you treat others."

John has a sweetness about him that shouldn't be taken as a weakness but as a strength. All people are treated the same. I've never seen him berate another with whom he works or treat anyone as a lesser being.

He's patient, kind, thoughtful, and anxious to teach others what he knows. He does this quietly, sincerely, easily...sometimes like the fumbling professor, but always with a smile and a willingness to explain over again when the class or person is trying to grasp the message. He wants to please, is anxious to get the important point across, and will go over something time and again until he knows he has made contact with the group or person.

He's easy to get to know, easy to understand, and rather shy sometimes but always honest. He's a good and gentle man."—*Barbara Schmerzler, FIABCI-USA national president, Westport, Conn.*

## Proficient, knowledgeable, compassionate

"I had the pleasure of working with John for more than 30 years when I worked as director of education/professional development for the Missouri Association of REALTORS®. John was a senior instructor in the Missouri



GRI program and the MAR Leadership Academy and a leader for a number of committees. He was able to reach members and adult learners by being extremely proficient and knowledgeable in the areas he taught, and he brought compassion and empathy.

I was asked to write the introduction to two of John's Five Minutes books. Not only could John reach his audience through live presentations, but he could do it through written tips, tools, and techniques as well.

John lived through some tough times to rise far above. I saw this firsthand when I watched him teach, saw the growth, and felt the compassion. He gives to the industry, his community, the REALTOR® organization, and, most importantly, his students. When John served as 2010 CRB Council president, we watched with pride as he led the organization with respect and admiration from colleagues.

Now I work in a different real estate education role, continuing to work with John. He epitomizes a true leader. What sets John apart is that he never gave up. His knowledge, experience, and compassion played key roles, but he strived daily to be his best. He never had to wonder if he did his best since the results showed on the face of his audiences, students, and anyone fortunate enough to work with him.

Many people have a bright future because John reached deep inside them, never gave up on them, and pulled out their true potential. The leadership journey allowed John to maximize his true potential and has made him the leader we all admire and respect today.” — *Terry Murphy, education specialist, Missouri Real Estate Commission*





tips for a

**More Effective**

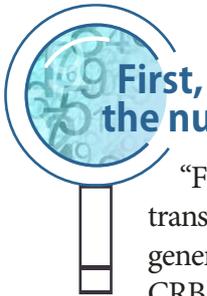
**Year-End  
REVIEW**



by G. M. Filisko

**Sure, you should evaluate your annual numbers. You should also assess your performance on less-concrete factors — and finish up by dreaming big.**

The end of the year is nigh, so the smartest agents and team leaders (**yes, we mean you**) are about to sit down and review how they did in 2019. In some ways, that's easy. You'll likely start by giving your sales numbers a good once over. But less easy is measuring your success on other, less-tangible efforts. Here are new ideas to help you do a comprehensive review while also getting a jump on next year's business plan.



## First, the numbers

Most real estate agents can rattle off their numbers for the year. That's, of course, important, so begin there.

“For me, the key numbers are how many transactions you closed and the revenue you generated from those,” reports Darren Kittleson, CRB, SRS, RENE, operating principal/broker at Keller Williams Madison in Wisconsin. Kittleson is also the instructor for the Real Estate Business Institute's elective course—[Building a Business Plan That Gets Results](#) for the Certified Real Estate Brokerage Manager, or CRB, designation.

“Also, where did that business come from?” he asks. “By that, I mean what were your sources for that business? Was it from referrals, open houses, something else? Also, what were your expenses, so what did you really net?”

“It's all about net profit, not gross revenue,” insists Kittleson. “Too many agents—and this isn't their fault, it's ours as an industry—recognize gross sales. But that could reflect no profit. That happens too often. You want to ask: Is the money I'm spending to grow my business giving me the return I expect? It's really a business conversation.”

Matt Marsh, director of sales at Lyon Stahl Investment Real Estate in El Segundo, Calif., who manages both residential and commercial agents, also delves into the numbers with his agents.



**MATT MARSH**  
director of sales  
Lyon Stahl  
Investment Real Estate  
El Segundo, Calif.

“Know your numbers,” he advises, suggesting a list of questions to ask yourself to help you understand your business results for the year:

- What was your sales volume?
- How many buy-side deals did you close?
- How many listing-side deals did you close?
- What deals did you double-end, and how did you go about double ending them?
- How many listing appointments did you set, and how many did you attend?
- How many calls did you make?
- How many contacts did you have, and how many follow-up calls did you make?
- How many of your leads ended up being listed by another agent?

- How many mailers did you send?
- How many email blasts did you send? What was the content for each one, and did you have growth? If so, how much?
- Are you looking to expand your team? Where do you need to hire to boost your business?
- What is your market, and are you looking to expand it?

Overall, Marsh says, you should be looking at your business plan for the prior year and how well you executed on each of its elements.



## Now, for the intangibles

Once you understand the concrete measures of your work, then it's time to move onto the less-concrete measures. Why evaluate more than numbers?

"Most people look at numbers because they're tangible," admits Carlos Pundik, a master certified coach in Fort Lauderdale, Fla., who works with real estate agents and companies. "But if you do only that, you're missing a bigger piece of your performance. For example, you could be really great at getting people to see properties and staging, but that may not be reflected in your numbers, even though it helps propel your numbers. If you know that, you can make smart decisions, such as hiring people to do the other tasks you're not as good at."

Also, your numbers are affected in large part by intangible factors. "It's one thing to review the numbers, but adding those other elements helps you dive deeper into why you might be struggling," says Marsh. "Maybe you can't

increase your business or you're having a hard time hiring someone for your team. Even if you're not struggling, typically people's work and home life is intertwined at least a little bit.

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—Darren Kittleson

"It's important to see if you're actually happy in your home life or life outside the office because that attitude typically changes your performance in the office," he adds. "If you're extremely unhappy outside the office, you won't perform well in the office."

With that in mind, Marsh works with his agents on an accountability program. "Each person has four goals, and typically three are geared toward work," he says. "The fourth goal is usually personal. It could be that you want to eat better and save money on lunch. It could be that you want to hit the gym three days a week. It could be that you want to make time to see your kids' sports games or go on vacation.

"We have it spelled out so I already know what that goal is for each agent," explains Marsh. "Then I can follow up by asking such questions as, 'Have you been bringing your own lunch?' or 'I know you had some goals related to helping your kids with homework every night; how's that going?'"

Those personal or life goals have varied depending on agents' priorities. Marsh has found himself asking: Did you achieve your fitness goals?

Did you achieve your family goals? Have you improved your overall knowledge? Did you buy any properties or improve your finances?

Marsh especially likes when his agents set real estate investment goals. “If you’ve gone through the process of buying or selling a property, you can better relate to the buyer or seller you’re working with,” he says. In fact, one of Marsh’s agents saw sales volume double after personally investing in real estate; it made the agent more comfortable speaking with clients about the process and its challenges.

“Also, because agents are commission-only, it’s nice to have their own property to feel more secure,” he adds. “We try to get our people to buy investment property so they have passive income and don’t feel as much stress if a deal falls through.”

Achieving fitness goals typically helps agents improve their business, too. “We’ve had several people improve their fitness, which improves their attitude,” says Marsh. “But it also makes them more disciplined. If they’re seeing the results of something fitness-wise after doing it five days a week, it makes them more likely to do the same business-wise.”

Finally, think broadly in terms of your entire year. “A question I’d ask would be: In addition to your sales goal, what were other results you achieved that were specific and measurable, and what were your milestones to indicate that you were on track with those?” suggests Pundik. “This question always gives agents something to really home in on and think about.

“The less-tangible results are what need to be brought to the foreground and acknowledged and made known,” he suggests. “Otherwise, they get

lost in the background and go unacknowledged.



## Questions to build for 2020

If you do a year-end review well, it should also serve as a solid foundation for the following year’s business plan. But be sure to avoid a common misstep.

“One mistake agents make—and I did this, too—was to say, ‘OK, I closed 20 transactions this year, and I’m going to triple that next year,’” explains Kittleson. “Unless something is dramatically different in your business plan, how are you going to get there?”

“We think we can force our brains to believe we can do that instead of achieving incremental growth,” he says. “But your brain has a BS detector. If you tell it you’re going to do 60 transactions, it’s going to go, ‘Yeah, right.’ Then you end up doing 40 or 45 transactions, which is great, but you’re disappointed you didn’t meet your goal—even though you really grew your business.”

That’s why Kittleson coaches agents to focus on progress, not perfection. Put another way, he encourages them to seek incremental growth. “So much of what helps or harms us in achieving our goals is our thinking,” he says. “If agents aren’t setting themselves up for wins and successes—that’s the incremental growth—too often, you’ll see burnout or you’ll see people flameout. But you could get to that 60-transaction goal in two years if you stay on the same path.”

Also, Kittleson really emphasizes that you evaluate the why of your career, pointing to [The Power of Why](#) by C. Richard Weylman. “Weylman talks about when you have clarity on why you’re doing something,” he says. “In the moments that are most

difficult, if that purpose is important and powerful enough, you'll keep going. It could be you want to have funds set aside for your kids to go to college or for your parents to be comfortable in their retirement.

"There was an agent in Oakland, Calif., named Oral Lee Brown who was a [REALTOR® Magazine Good Neighbor Award](#) winner," says Kittleson. "In the late 1980s, she stood in front of a class of first-graders at a school with a dropout rate of 80 percent and essentially said, 'Every one of you who graduates high school, I'll take care of college for you.'"

*Another suggestion: Designate where the extra money you earn will go. "Let's say you want to go from \$100,000 to \$300,000, Determine where every dollar of the \$300,000 will go because unless you know where it's going, you won't earn it. We all have a set point we're comfortable at with our income—where and how we spend it."*

—Darren Kittleson

"I heard her interviewed after receiving the award," he recalls. "She said she was a brand-new agent, but that promise got her focused on being successful. I'm guessing that any time she faced something adverse during her career, she pushed through because she wasn't going to let those kids down."

If your purpose is to just make a living or be successful, your *why* won't have that power. "That's too vague," Kittleson insists. "When things get tough, we let ourselves off too easily. You have to quantify something so it's not too squishy and you're moving toward it."

Another suggestion: Designate where the extra

money you earn will go. "Let's say you want to go from \$100,000 to \$300,000," explains Kittleson. "Determine where every dollar of the \$300,000 will go because unless you know where it's going, you won't earn it. We all have a set point we're comfortable at with our income—where and how we spend it."

"You might be saying, 'I'll figure out where it'll go later,'" he predicts. "No, you won't. You'll figure out how to *not* get there. Maybe you believe in giving away a percentage of your income each year, say, 10 percent. Then figure out today what organization you're going to commit to giving \$30,000. You're building in tools to make sure you have that pull. That exercise works brilliantly for people."

Finally, Kittleson suggests you end your annual review by doing some dreaming. "I tell agents, 'Let's say it's the end of 2025, and we're in some cool Caribbean spot having a class of wine looking at the sunset. I ask you how the last five years have been, and you say they've been amazing. What would have to happen to get you to say that?'"

"I think agents should start dreaming like that," he advises. "Our brains have the capacity to envision the future for about five years; otherwise, it's too far out. People aren't afraid to dream in five-year increments, and it isn't so close that you have to be realistic about what you say."

"I don't know another industry that allows us to generate as much revenue with so little money up front," states Kittleson. "Really, the sky's the limit. It's just about what's important to you. If you have big dreams, this industry could fulfill them for you if you choose." 🍊

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*G.M. Filisko is a lawyer and freelance writer who specializes in real estate, legal, business, and personal finance topics.*

## The Best Listing Appointment Leave Behinds

It's what you "say" after the listing appointment that may convince the sellers you're the best agent for the job.

Sure, the sellers seemed to like and trust you during the listing appointment. But you're not convinced they're ready to list with you. Ah, but they will once they look at what you've left behind for them to review without the pressure of you staring right at them.

So what's the perfect leave-behind? Agents here reveal their deal-cinchers.

### It's simple: Your plan

I've always found that leaving sellers with a written copy of your marketing plan was something they liked the most.

—*Rebecca Hill, SRS, agent, Champions School of Real Estate, Houston*

### The three factors to success

Any great leave-behind must have three key components. It should be relevant to the customer. It should reflect your work. And it should be useful.

A good example would be ballpoint pens with your information printed on the side so that every time customers pick them up and start writing, they'll be reminded of you and your business.—*Ben Mizes, CEO and agent, St. Louis-based Clever Real Estate.*

### No leave-behinds; it's email-befores

We no longer leave expensive and tree-killing printed materials. We're a cloud-based green company and virtually paperless these days.

Instead, we provide information on the front end. Our sellers have often told us that the fact that we provide an email with links to all our presentation and factual information is one of the reasons they hired us for the job.

The additional benefits, of course, are that we can update the information at any time and, since most are interactive, update from the source automatically. This is especially important when explaining the state of the market in their neighborhood. If sellers are on the fence about listing, the information we send is continuously updating, so they're able to see trends, pricing information, and much more.

When our agents meet with potential sellers, those sellers have already had a chance to preview everything we have to offer, allowing our agents more time to get to know the sellers in person and for us to answer their questions or concerns. It's definitely been a game changer for this company and saved thousands of dollars in the process.—*Vanessa Saunders, CIPS, PSA, SRS, principal broker/CEO, Global Property Systems, White Plains, N.Y.*

# Listing Strategies

## A puzzle we can help you solve

I have a custom jigsaw puzzle because the complex logistics of putting a home on the market, preparing it for sale, and coordinating a move require deftness and skill. The pieces need to fit together like the pieces of a puzzle. And there's an order to putting the puzzle together, just as there's an order to coordinating the sale and the move.

I can put the puzzle together quickly because I do this work all the time. However, an owner is likely to value the help of a professional to complete the task quickly and efficiently with the best results.—*Michael Shapot, lawyer, broker, The Shapot Team, Compass, New York City*

## Walk them through your plan

If I don't have a signed contract, I make an impression by leaving behind information on how I'll market their home differently than any other agent. This starts with a link to a video that thanks them for the opportunity and includes an image of their home, images of neighborhood highlights, and images of the marketing materials.

To support the video, I provide hard copies of a professional flyer with a picture of the seller's property and the property's features; highlights of my social media footprint; an avatar showing who's likely to purchase their home; social media posts and ads on Facebook, LinkedIn, and Instagram; emails/newsletters and information on the size of my database; a calling and door-knocking plan; and my overall marketing plan highlighting the timing of all posts, ads, emails, networking activities, and so on.

This shows the sellers how I'm working hard. Sellers love it because it allows them to see and understand the overall marketing plan and how a property is sold in today's market.

—*Donna Castillo, agent, Keller Williams Realty San Jose-Gateway, San Jose, Calif.*

## It's a bio, but with an eye-catcher

My one-page bio is my most effective leave-behind because it's personal, very eye appealing, and includes a silver foil seal that says, "Peace of Mind is an Award Winning Team." I have one for every team member. It's in the upper right hand corner and on the front of every bi-fold, branded folder.—*Stacy Corrigan, C-RETS, RENE, SRS, broker-president, Peace of Mind Property Management & Real Estate, Woonsocket, R.I.*

## Two steps, two leave-behinds

We do a two-step listing. We first view the home to make notes of any updates and confirm public-record information. At this meeting, we leave behind a packet with our resume, testimonials, information about our company, and some information on how we market homes.

At the second meeting, we discuss the home, the comparables, and the current market data. Here, we leave behind a market area survey, sales for the past three months, and their home information.—*Robyn Nasuti, SRS, Real Living Suburban Lifestyle, Upton, Mass.*

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# Listing Strategies

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—*Donna Castillo, agent, Keller Williams Realty San Jose-Gateway, San Jose, Calif.*

## Leave a CMA-plus

The most useful item you can leave behind at a listing appointment is a personalized CMA. A thorough CMA shows prospective sellers you are detailed-oriented and have done your research, you have your finger on the pulse of the market, and you can make a confident estimation of the property's sales price.

Whenever I'm crafting a CMA for a leave-behind, I always throw in a couple of paragraphs right after the projected price about marketing ideas and positioning strategies. You have a

captive audience, and it's in your best interest to share how you'd handle the listing after securing it.—*Christopher Linsell, real estate analyst, TheClose.com, New York City*

## The trifecta of leaving behind

Every seller is different in the Chicagoland market, but I'm consistent with my leave-behinds. They're a CMA, my comprehensive marketing plan, and a small thank-you gift. That could be a key chain or maybe a \$5 gift card to Starbucks.—*Jeremy Vitell, SRS, agent, Baird & Warner, Chicago*



## A relaxing stroll through details

I have a folder I created and leave behind. It contains market stats for our specific area, information about me and my business, and raving past reviews from other clients.

I do feel it's helpful to leave this behind. Many times, sellers have so much running through their minds when we're sitting together

# Listing Strategies

discussing their home—pricing, staging, showings, feedback—that I think they can feel overwhelmed by this entire process.

I picture my sellers sitting down at a later, much more relaxed time and flipping through my folder page by page.

—*Hilary Harvanek, SRS, PSA, broker, Keller Williams Premiere Properties, Glen Ellyn, Ill.*

## A discount card adds value

I leave a personalized American Saver card behind at my listing presentations as well as at open houses as part of my display with a note: “Please take an American Saver card compliments of the sellers and Bastman Properties.”

It’s a discount card that works nationwide that’s a huge hit with my clients. I buy 25 at a time at \$15 per card. It has my photo, company name, logo, phone number, and real estate license number. It’s the perfect way to stay top of mind.

—*Kelly Bastman, SRS, ABR®, SRES®, AHWD, e-PRO®, MRP, RENE, RSPS, PSA, C2EX, broker/owner, Bastman Properties, Lake Elsinore, Calif.*

## Testimonials, explanations of online estimates, and more

I leave behind a copy of my best and most recent testimonials and client reviews. Under the reviews, I say, “I truly care about my clients and want to help them; let me help you.”

Do your research and evaluate your comparables. Find out if the Zillow Zestimate was far lower than the actual sales price of the sold comparables. If so, provide a demonstration of this finding in your listing presentation. Use a cool infographic, and leave this with the client. You’ll be remembered as the thorough, competent agent who is set apart from all the others.

Ask for a follow up if the sellers aren’t ready to say yes. Create a professional appointment-reminder page. Fill in the date and time of the follow-up meeting, and leave it with them. No other agent will do this.—*Benjamin Ross, agent, Mission Real Estate Group, San Antonio, Texas*

## Show me the money!

The best leave-behind from listing appointments is the potential profit the seller can make. Having that number prominently available gives sellers time to have the reality of what selling could look like sink in. I’ve even wrapped a wine bottle with that number as a listing appointment thank you...cheers to the sale!

—*Jamie Klingman, ABR®, CIPS®, e-PRO®, MRP®, broker, Boutique Realty Florida, Tampa, Fla.*

## Be their sales guide

My best leave-behind is my company [Seller’s Guide](#). It’s a booklet that explains a great deal about my company, sales processes, things to do to get your home ready, and so on

—and it looks cool.—*Brad Pauly, broker/owner, Pauly Presley Realty, Austin, Texas*

## Brokers Train Using the Latest Tech

When you don't have the time or resources to train each agent individually, video and online training can stretch your reach.

Look, if everybody's talking by video and online, why not migrate your training there?

Some brokers have done just that, even those at boutique companies. Here's what they're doing and their advice for others who haven't yet jumped in.

### Large brokers go all in

The biggest companies have long since incorporated online training into their platform. "We use webinars weekly via GoToMeeting for all of our different coaching groups," reports John P. Powell, chief development officer at Help-U-Sell Real Estate in Tucson, Ariz.

"What's taught varies from week to week but can include anything from creating and updating annual business plans, testing new marketing ideas, or explaining how new program additions to the marketing platform work," he explains. "Generally the sessions are recorded and can be accessed in a private space available only to franchise owners."

That type of training is also available to Michele Wray, CRB, an agent with Coldwell Banker Developac Realty in DuBois, Pa. "We do a lot of training through webinars and online," she says. "Our franchise provides

to us CBExchange University, which houses many learning courses we can use to teach, and our agents really thrive using them."

### DIY online training

Donna Castillo, an agent at Keller Williams Realty San Jose-Gateway in California, has a marketing background from Fortune 500 companies and now applies that knowledge in her work as an agent. "What was relevant in a corporate environment is the same in a real estate office," she says.

According to Castillo, training is a three-pronged process, and content should be delivered through:

- Webinars and videos
- Face-to-face training in a classroom setting and at sales conferences
- A mentorship program that includes one-on-one face-to-face training

"Webinars and videos are the most cost-effective way to train newbies and keep seasoned vets up to date on market trends," asserts Castillo. "Webinars are customarily live and allow attendees to ask questions and connect with the trainer. You can also tape



them and make them available for attendees to refer to later. You can track who attended and have a ‘test’ at the end to ensure the attendees understood the content and to track any holes in the content delivered.

“Training videos allow users to stop, repeat, save, and refer back when needed,” she notes. “They’re used more as an at-your-own-pace training method. You can make your videos as elaborate as you choose, and you can highlight how-tos.”

“For example, you could record a top-producing agent on the phone and cold calling so others can listen to how she deals with the calls,” suggests Castillo. “Or you could follow an agent as he’s door knocking in his farm. Both are great examples of how to use video as a training tool.”

Castillo says you can cover the same content using both methods. “The only difference would be in the live interaction that a webinar provides,” she explains.

“Our cost is part of our overall infrastructure cost,” says Castillo. “The only additional costs would be for the webinar software to deliver the content or the cost for videotaping, which can range from thousands to tens of thousands based on the content, the delivery of the content, and how elaborate you want to deliver the content to attendees.”

At Castillo’s company, videos are live on the company’s intranet, making them readily accessible to each agent. “Webinars are delivered through a unique link,” she states. “Once the webinar is over, its recording can be made available on the intranet.”

## Start online, then we'll talk

For Bruce Ailion, ABR®, CRS®, CRB®, e-PRO®, a broker/lawyer at RE/MAX Town and Country in Atlanta, webinars and on-demand training are a critical part of training. In fact, he wants his agents to go online before knocking on his door.

“When I started in real estate in the early 1980s, often training was available only live,” Ailion recalls. “It was expensive to travel to the training location, and it was a single exposure. Trainers, beginning with Zig Ziglar and Tom Hopkins, sold cassettes that were bulky, breakable, and expensive. For advanced training, you might have to go to a research library and order materials from a larger library.

“Today we have every kind of training on demand, much of it free or at a fraction of the actual cost of years ago,” he notes. “As a team leader, I want my people to master the available online materials, and then I’ll explain the complex issues or train on the finer points. It’s not the best use of my time teaching the basics. When someone isn’t willing to go through basic training, advanced training is of little value.”

For some brokers, online resources are primarily for continuing education, not agent training. “We’re using webinars and videos mostly for continuing education,” notes Bridgette Freeman, managing broker of the Juwai Realty Team at Palmer House

Properties and owner of Juwai Real Estate Academy in Stockbridge, Ga. “Otherwise, agent training and coaching are in person.

“In our state, agents are required to fulfill 36 hours of continuing education every 4 years,” she adds. “There’s a wide range of subjects agents can choose. The cost is still very low. A three-hour continuing education class may cost only \$20. We use webinar software, such as Zoom, to provide the training.”

## Small companies have wide access

We’re small, so even these resources are hard for us to fit into our budget, you say? Fair point, but all hope is not lost.

“In addition to our franchise materials, we also watch Tom Ferry and other coaching videos in our training classes,” notes Wray. “I’ll find YouTube videos to use on safety and various other topics to incorporate, too. It’s that kind of training that our agents like and respond well to.”

It’s Ailion’s experience that all the major real estate brands have extensive training available online. “But smaller, independent firms can borrow materials from the NAR library, participate in local REALTOR® associations’ training, or buy on-demand training from most of the national trainers at moderate costs,” he says. “Today’s new agents have such better access to world-class training than agents had years ago.”



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## How to Create Effective Checklists

**Category:** Professional Development

**Materials Needed:** Handouts included with meeting materials and flip chart

**Estimated Time:** 15-20 minutes

**PowerPoint Available:** No

**Meeting Objective:** To help your agents understand how important and effective checklists can be in their business. The meeting should also help agents realize how checklists can be used as a risk-reduction tool for the brokerage.

### INTRODUCTION TO TODAY'S MEETING

Begin with this statement: J. Willard Marriott said, "It's the little things that make the big things possible. Only close attention to the fine details of any operation makes the operation first class."

**Explain to the group:** Today, we're going to discuss creating checklists for your business.

**Note:** If your company currently uses checklists, this is a good time to review and evaluate your current checklist system with your sales staff.

Below are some possible questions to begin your meeting. **Ask:**

- How many of you currently use checklists?  
*Ask for comments and feedback from agents currently using a checklist and how it has been helpful for them.*
- Do you feel checklists are helpful with your real estate activities?  
Why or why not?
- Are there any checklists our organization should think about using that we're currently not?

### STEP 1

Have your agents get into groups of three to four and distribute Handouts 1-A through 4-A provided with the meeting materials. It's OK to have more than one group working on each assignment. Larger offices might have two or three groups working on Handout 1-A, 2-A, etc. Smaller offices may need to work on only one or two of the handouts during this exercise.

**Note:** Make more than one copy per assignment if you plan to have more than one group assigned to each checklist task.

The goal of the assignment is for groups to develop a checklist for their assigned task. Allow 5-10 minutes for the group to make a list of tasks that should be completed, recording their responses on the handout. Each group will need someone to report to the entire office on the contents of the group's checklist.

Be prepared to write the responses on a flip chart or have someone in the office who has good penmanship record the answers. This is also a good meeting to have a company assistant available to take notes since most of your information will need to be constructed into checklists for your agents to use on a regular basis.

**Note:** It's important to remember that checklists can be an excellent aid in risk reduction for brokers/managers. Be prepared to discuss and add comments for items that should be included on the checklists for complying

with real estate commission rules and regulations as well as your company policy and the REALTOR® Code of Ethics.

## STEP 2

**Begin** a discussion with your group as a whole on the types of checklists it would be important to have. Here are a few ideas:

- Just-listed properties
- Just-sold properties, with separate checklists for dealing with buyers and sellers
- Price reductions
- Open houses, with separate checklists to plan for the open house and to follow up afterward
- Accepted offers, with separate checklists for dealing with buyers and sellers



# SalesStrategies

**Record** responses on your flip chart and, at the conclusion, ask for volunteers who might want to help build checklists for each suggestion. You can also agree as a group to use next week's sales meeting to continue building the needed checklists.

## STEP 3

**Tell** your group the checklists will be available for use within the next few days.

Be sure to follow through on your weekly meeting by having the checklists built or developed into finished forms for your group to use. Have your assistant or someone inside the office take the finished checklists and produce the documents to be placed on the company intranet or e-mailed to your agents for use with their businesses.

## CLOSING

Close the meeting with this story from Glenn Van Ekeren's *The Speaker's Sourcebook II*.

Walmart founder Sam Walton was a believer in tending to the details. One day while visiting a competitor's store, which was in total disarray, Walton pointed out to one of his executives a procedure he liked.

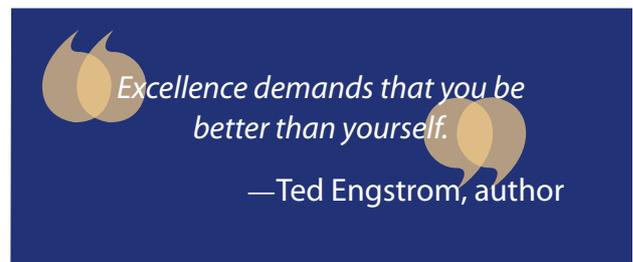
"Why aren't we doing this?" he asked.

Rather than criticize or put down his rival's chaos, Walton was looking for one thing that would give his company an edge and make it 1 percent better.

Van Ekeren goes on to say: How about taking a walk through your organization? What 1, 3, or 17 areas can you identify where 1 percent better is possible?

Adopt the concept that "finished never is." The Japanese have a word for it: *kaizen*, meaning continuous improvement. In other words, the status quo is never acceptable. Make things 1 percent better.

**Explain to your group:** Perhaps integrating checklists for our tasks can help us become that 1 percent better than our competition. We started the meeting with the quote from J. Willard Marriott, and it's worth repeating: "It's the little things that make the big things possible. Only close attention to the fine details of any operation makes the operation first class."



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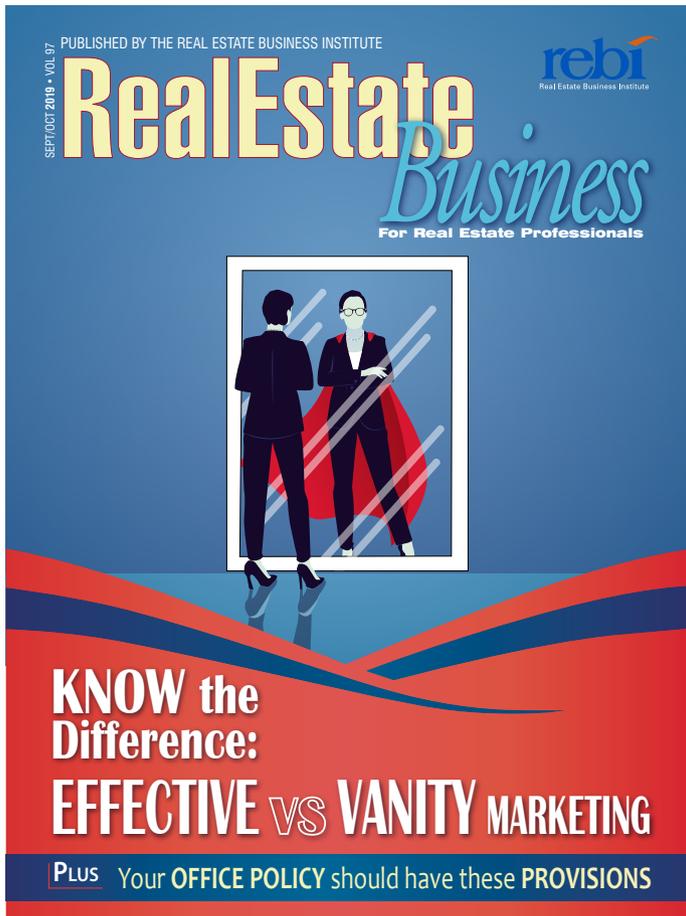
*John Mayfield, ABR®, CIPS, CRB<sup>sm</sup>, C-RETS, e-Pro, GRI<sup>sm</sup>, RENE, SRS, received his real estate license in 1978 and has been a practicing broker since 1981. He earned his Master's degree from REALTOR® University in 2015, has been recognized as REALTOR® of the Year from his local board, and received the 2014 Richard A. Mendenhall Leadership award from Missouri REALTORS®. John has spoken to thousands of real estate professionals in over 22 countries and served as the 2010 President of the CRB Council. He also owns and operates the Global Real Estate School. For more information, visit [www.globalrealestateschool.com](http://www.globalrealestateschool.com)*











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