

# SCALE

"David opens up his entire playbook here and doesn't leave anything out. A must-have for any agent who takes their business seriously."

—AARON AMUCHASTEGUI, host of the *Real Estate Rockstars* podcast

## A Successful Agent's Guide to Leveling Up Their Real Estate Business.



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**DAVID GREENE**

BESTSELLING AUTHOR OF  
BUY, REHAB, RENT, REFINANCE, REPEAT



# SCALE

A Successful  
Agent's Guide  
to Leveling Up  
Their Real Estate  
Business

**BY DAVID GREENE**



BiggerPockets®  
PUBLISHING  
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## *Praise for the series*

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“As the person who brought David into real estate sales, I’ve watched his growth in this area from zero to hero. David’s explanations and systems for how to become a top-producing agent are unquestionably effective. I can’t think of a better person to write a book this needed in the industry.”

—**David Osborn, *New York Times* best-selling author of *Wealth Can’t Wait* and *Bidding to Buy***

“David opens up his entire playbook here and doesn’t leave anything out. A must-have for any agent who takes their business seriously.”

—**Aaron Amuchastegui, host of *Real Estate Rockstars* podcast and author of *Bidding to Buy***

“I wish this book had existed when I was selling real estate! David has done a fantastic job of breaking down what it takes to be successful into simple, easy-to-follow steps that help agents master their craft and become top producers. I love this book!”

—**Pat Hiban, former No. 1 agent for both Keller Williams and RE/MAX, *New York Times* best-selling author of *6 Steps to 7 Figures***

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**David Greene**

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## CHAPTER ONE

# TRANSITIONING TO ROCKSTAR AGENT STATUS

*“Always dream and shoot higher than you know you can do. Do not bother just to be better than your contemporaries or predecessors. Try to be better than yourself.”*

—WILLIAM FAULKNER

In *SOLD*, the first book in this top-producing real estate agent series, I provided a blueprint to help agents become top-producing agents. As that book pointed out, the most difficult part of any real estate sales career is the beginning. Every inch of progress comes with massive effort and a lot of mistakes. The return on effort is low and so are the conversion rates. Conversely, top-producing agents have the momentum, confidence, experience, and skill using the tools of the Sales Funnel. It takes time and repetition to build these abilities, which is why getting started is the toughest part.

When an agent first enters the business, they are advised to talk to everyone they know until they get a lead. Every day in the office is the same thing. Lead generation, ask for business, be persistent, and get told no. This is the most exhausting and least fun part of the journey. Many new agents want to quit, and many do.

## **The Transition Process**

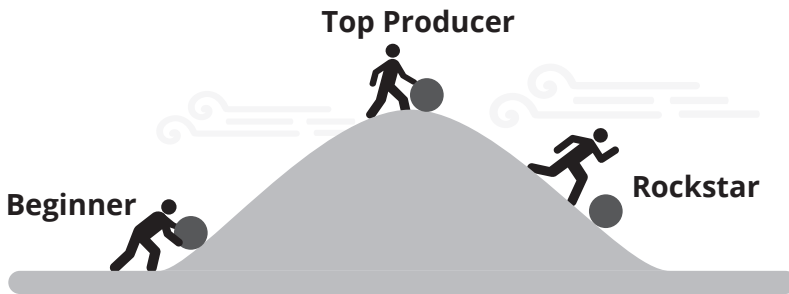
Think of a real estate career as pushing a boulder up a steep hill. Every step is agonizingly slow. Your muscles burn, you're breathing hard, and you're sweating profusely. Your fingers are rubbed raw. It takes everything within you not to quit, and you sometimes fantasize about letting go of the boulder. But to quit the real estate business before closing a single deal means you will lose money, you will lose time, and you will lose effort. You might even lose face. But you keep pushing. You attend meetings, hand out business cards, make phone calls, and ask for referrals. After several months, you garner a couple leads—but don't get them into contract. Several months later, you finally get one into contract—but it doesn't close. Nine months later, you have your first closing. It's a close friend. And now it's back to pushing the boulder uphill.

After enough time and experience, the boulder gets easier to push. You find your rhythm. You close enough deals to make a living, and you no longer hate the job. Then, in one month you have three houses in escrow. You realize that you're not half bad at this! You get recognition and respect from others in the office. You've crested the mountain top, and you can roll the boulder faster because the land has flattened out.

Top-producing agent status feels great. Ironically, though, it's at this point when most successful agents take it easy. Why? Because they are no longer in danger of the boulder rolling backward and over them. The fear factor is gone, and they don't have a Big Why for being in this business. If that Big Why isn't big enough, they put in less effort, have less focus, and spend less time creating their business. These top-producing agents make a good living but stall in their career.

However, I believe any agent can become a rockstar agent. The key is to keep your focus on pushing that boulder further and further. If you do this, you make it to the other side of the mountain where business is doing well almost without you. Being on this side means leads flow to you, clients get into contract more easily, and more deals close with less effort.

You recognize problems before they occur, so your deals are smoother. This is when the business becomes fun. Your boulder's momentum is taken over by gravity as it starts down the other side. You jog next to the boulder while the money rolls in. Once you can no longer keep up with the boulder, you hire a team so as not to lose momentum. This is the life of a rockstar agent.



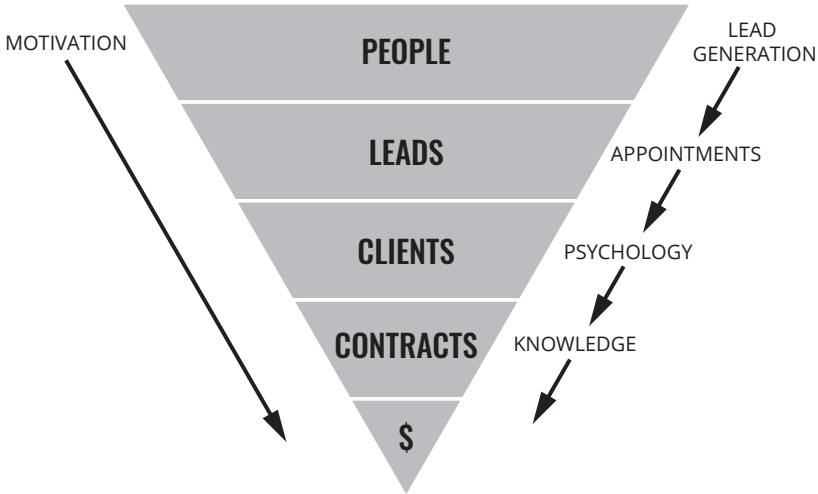
This book covers your next transition: from being a top-producing agent to becoming a rockstar agent. Rockstar agents have distinguished themselves from their competition. They are well respected in their sphere of influence and their community, earn a higher living, and have built a team that makes them look good (like a rockstar with a great band of musicians). Rockstar agents have an exceptional staff and clients who love them. If this is what you pictured when you were studying to get your license, this book can help you reach your real estate dream.

Is it tough to get there? Of course. Is it a pipe dream? Definitely not. Not only is rockstar status possible, but it is also the natural progression for agents who follow the advice and models laid out in this book. Those who master the Sales Funnel and convert leads at an elevated level generate so much business that they cannot keep up without a team. Many top-producing agents are closer to this point than they believe.

The key to unlocking your rockstar potential is leverage, which is covered in Chapter Two of this book. Once you control what is keeping your mind occupied and your eyes off the prize, you'll notice all the opportunities you're missing. Most agents who crest the hill and become top-producing agents then do very little lead generation. Truthfully, you don't have to. If you're making a good living and want to stop at top-producing agent level, of course you can. If you want to be a rockstar agent, though, you'll want to keep reading this book.

# The Sales Funnel Recap

The Sales Funnel I describe in my book *SKILL* helps agents track where they are in the sales process with a prospect or a task that crosses their desk. It allows agents to make quick decisions regarding next steps in order to move that prospect or task forward and to use the correct tool to help them do so. In the figure, the right side is the tools to move the Lead to Client and then to Closing.



CLASSIFICATION	DEFINITION
<b>People</b>	Anyone (though typically those in your database)
<b>Lead</b>	A person who knows who you are and wants to buy or sell a house
<b>Client</b>	Someone who has signed a listing agreement or a buyer representation agreement
<b>Contract</b>	A purchase agreement fully executed by both the buyer and seller
<b>Closing (\$)</b>	The event when a title is transferred from seller to buyer and the funds are transferred from buyer to seller

When you get a phone call from one person asking about the current state of the market and a text message from another person asking about the disclosure packet you sent them for a listing, how do you prioritize your work and figure out where these two people are on the motivation scale? By using the Sales Funnel. With a quick call to the person asking about the state of the market, you quickly determine they do not want to buy a house right now but want to know if a “crash is imminent.” This would classify them as People, and you would use lead generation to move them down your funnel. They are clearly not as motivated as the texter, who qualifies as a Client, and you’d use psychology to move them further along the funnel. By helping them feel less worried about the disclosure packet, you are one step closer to putting them in the Contract category.

This method of classifying information and referring to the appropriate tool to progress prospects through the funnel should begin at the start of an agent’s career because it offers direction in a new and confusing world. This method remains critical for top-producing agents who are juggling incoming leads, client questions, and issues with escrow while continuing to grow a lead database. A system that keeps Leads flowing along the Sales Funnel could mean hundreds of thousands of dollars in commissions. The Sales Funnel creates the structure and direction to be efficient in getting to Contracts.

As a rockstar agent, people will look to you for your knowledge, your time, and your advice. The Sales Funnel will keep you productive with revenue-creating tasks made with fewer mistakes. Rockstar agents, much like rockstar musicians, do whatever is necessary to give the performance their audience expects.

## **The Role of the Rockstar Agent in Their Business**

As a solo agent on the way to becoming a top-producing agent, you were the salesperson, accountant, administrator, listing agent, buyer’s agent, showing agent, database manager, counselor, and more. Even if you didn’t want to, you had no choice. As a top-producing agent on your way to rockstar status, you go from viewing real estate as a job to viewing it as owning a business. You need a team to perform the various tasks you used to do. This mental shift is the first thing you must accept on the path to becoming a rockstar agent. You cannot do it alone anymore; more importantly, you *should not* do it alone.

The job of the rockstar agent isn't to close the deals, complete the files, and post to social media platforms—it's to draw in the crowds and make them love the selling or buying experience. Just like rockstar musicians showcase less-famous bands as opening acts, you showcase your agents and administrative assistants as they develop their skills working for you. Rockstar shows create revenue for the food and beverage companies supplying the refreshments at the venues. You do the same by creating business for lenders, title companies, home warranty representatives, and others. Rockstar agents have contracts in which they get a cut of all these sales. While the Real Estate Settlement Procedures Act makes it illegal for agents to receive referral fees and kickbacks, you can still receive leads or marketing dollars. These are major perks to the rockstar agent's business.

The crucial point to understand is that rockstar agents draw in the buying and selling crowd; they don't do the actual servicing. People are attracted to your knowledge, expertise, experience, and the way they feel supported throughout the process. The more tasks a rockstar agent takes on—or worse yet, refuses to give up—the less focus there is on growing the agency. Wouldn't you rather hear Adele on stage singing, not serving you at a concession stand? Deliver your stellar performance as the rockstar agent. Create opportunities for others. Train your team to be the best at their jobs.

As a rockstar agent, you'll split your time between performing high-dollar activities and training your team to grow your business—and their careers. There is a vast difference between delivering information to clients (you) and collecting it (your team), skill work (you) and busy work (your team), and setting your business up for success (you) and running everything (your team). Your mindset must change. You must teach your team how to do the things you used to do because your job is to keep up with the speeding boulder. I go into the mindset shift in great detail in Chapter Thirteen.

Rockstar agents recruit not only clients but also talent. This book will teach you how to interview, how to hire the right people, and how to train them properly. You'll learn the incredible difference the right team member can make to your business compared to the drain of an employee with the wrong energy. You'll also learn a lot about yourself, including how difficult it can be to accept change, embrace growth, and adapt your thinking so you can hit your highest potential.



The business's most important tasks are summed up with the acronym PLAN:

- **Prospect** (lead-generate)
- **Lead Follow-Up** (set appointments)
- **Appointments** (secure clients)
- **Negotiate** (put properties in escrow, and keep them there)

Even your PLAN work is supplemented by your team. When you embrace the power of leverage (Chapter Two), you get so much done in an abbreviated timeframe (see Chapter Eight on efficiency). In order to shift from being a solo agent to a top-producing agent to a rockstar agent, your goals must evolve. You will no longer handhold a client the entire way through a process; your team does that. You therefore need a team to accomplish your top two priorities: convert Leads into Clients and move Clients into Contracts.

The following table describes some of the ways the PLAN makes your office more efficient. This is the PLAN for an administrative assistant:

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<b>Prospect</b>	<ul style="list-style-type: none"><li>• Film you in a meeting; upload the video to your social media</li><li>• Schedule you for real estate podcasts; blast the link across your social media and to leads in your database</li><li>• Call past clients on your behalf and ask them if there is anything you can do to help them</li><li>• Print out lists of For Sale by Owner, expired listings, and contact info of members of your database; upload these printouts into an auto dialer</li><li>• Schedule meetings or events; prepare slide presentations; send out Eventbrite links; enter all attendees into your database</li></ul>
<b>Lead Follow-Up</b>	<ul style="list-style-type: none"><li>• Track new leads that come in via email; enter them in a spreadsheet</li><li>• Enter new leads into database; attach a follow-up plan to them</li><li>• Call leads to schedule a time for you to talk with them; offer to connect buyer with your preferred lender</li><li>• Enter notes into your calendar or database re: what the lead said they want</li><li>• Fill out a Lead Sheet to save you time</li></ul>

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**Appointments**

- Call leads to schedule appointments; prepare prelisting packet for you to bring on listing appointments
- Put appointments on your calendar; prepare buyer-broker agreements or listing agreements
- Set up space to receive leads (with marketing info, branded pens, flyers, bottles of water, etc.)
- Create customized cover page with clients' names; insert photos on the first slide
- Become licensed; conduct presentations on your behalf

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**Negotiate**

- Prepare a spreadsheet summary of offers received on your listings; make relevant data easy to find
  - Review inspection reports with your clients before you speak with them
  - Weed out the lowest offers on your listings by speaking with the listing agents
  - Call lenders of those looking to buy your listings to see who is the most qualified
  - Speak to listing agents to find out how many offers they have and what price the seller is hoping to receive
- 

## The Purpose of Leverage

Rockstar musicians are the magnets that draw the best people to them. They work with the best producers and promoters and perform in the best venues. Rockstar musicians surround themselves with talented teams and limit themselves to writing and performing. To be a rockstar agent, you must accept that you too cannot achieve your potential without a team. Of course, not everyone you hire will turn out to be the right choice. You must learn the skills to hire good people, train them, and manage them. You will experience frustration and failure in this process. I sure did. That's why I explain hiring in its own chapter.

Seth Mosley, the Grammy-winning music producer of twenty-eight No. 1 songs, told me, "I've seen a hit song turn a career from crawling to crushing. It can literally change overnight for an artist that feels like they have been struggling for a decade or more to succeed. As we say in the music biz, a hit can cover a multitude of other sins. Meaning, even if they fail at most everything else, having a hit can make up the difference." Many musicians struggle in the competitive world of music and don't

## CHAPTER THREE

# GENERATE LEADS LIKE A ROCKSTAR

*“You are out of business if you don’t have a prospect!”*

—ZIG ZIGLER

Every successful agency has strong lead generation. Your team members will look to you, as the rockstar agent, for one main purpose: bringing in leads.

### **How Rockstars Generate Leads**

As detailed in the previous chapters, the point of being a rockstar agent is to no longer do everything yourself. What rockstar agents do well is (1) generate new leads and (2) move clients into contract. I would argue that nearly every sales job revolves around these two points of contact with a client.

By having a team to handle the other sections of the Sales Funnel, you can be more productive at those two priorities. Remember the PLAN in Chapter One? This is what allows you to do what you do best.

How successfully these two points of contact are executed will determine how profitable your business will be and how long you retain your staff. These are the two most important tasks. Hiring skilled staff and training them are the next tasks.

In short, the rockstar generates leads. Your admin assistant follows up with that lead and sets an appointment. One of your agents meets with the lead to deliver a presentation. Your showing agent takes the new client to see homes. Your contract manager writes the offers on the homes the client likes. From there, your transaction manager takes over and begins the escrow process. Showing agents arrange to meet inspectors and appraisers. Admin assistants communicate with lenders. But none of this can happen if you don't get Leads into the Sales Funnel.

The two most important metrics of lead generation are (1) appointments to deliver presentations and (2) houses put into contract. To hit your target number of appointments, you must have enough leads and follow up with them. To get clients into contract, you must find houses your clients like and make them feel comfortable writing strong offers to buy those houses. Your sales skills and psychology skills as a rockstar agent are crucial to putting clients in contract. This is why lead generation is the rockstar agent's job.

## **Team Lead Generation**

This is not to say that members of your team won't also generate leads. This is where you can embrace your team's strengths.

In Chapter One, I described the difference between busy work and skill work. Skill work is obviously work not anyone can do, as it requires experience. Your job as a rockstar agent thus includes training your team to do skill work.

While your team supports your lead generation, they also learn from you. They hear how you handle objections on the phone, see how you read leads, and watch you put new clients at ease. They slowly build their confidence to do the same when the time is right. This is a powerful way to teach your team members.

Part of the training is also teaching team members to do MLS searches, contact listing agents to schedule showings, and answer questions the client asks. My team members go on showing tours with me. After they learn what I do, they can take over those responsibilities. Imagine having

a team of people who can build your business while they build up their careers. This is how my team is structured.

This works for selling clients too. I bring promising team members to my showing appointments. I ask them for staging notes and design recommendations. I ask them to get spare keys made. I have them schedule the inspections or repairs we order.

When they sit with me during listing presentations, they hear how I deliver information, see the way the leads receive it, and watch as I conduct a delicate dance with the lead. They learn how to get the listing agreement signed. This not only makes my job easier as the listing agent, but it also helps them learn how to land their own leads and convert them to clients. I firmly believe this teaching approach is the future of real estate sales.

Most leads will come from your sphere of influence, your open houses, your online sources, your social media, and your past clients. But your buyer's agents can hold open houses on your listings and find their own leads that way. Your assistants can call past clients to ask if they know of anyone who is looking to buy or sell a home. They can manage your social media and send newsletters to your email list. When you have a team of people working on lead generation, you obviously find more leads than on your own. When you show your team the value of creating leads, they take more ownership in the success of the agency. More leads create job security and more opportunities to make more money. Offering bonuses for Leads that reach Closing in the Sales Funnel creates a natural incentive for your team to increase their efforts in lead generation and lead follow-up.

## **Lead Follow-Up Systems and Support**

It is at this point that the CRM system and checklists discussed in Chapter Two become a necessary component of your business. In our office, leads are entered into our CRM. The CRM automatically sends out introductory messages to the leads and reminders to the appropriate team members to follow up with the leads. An auto plan via the CRM reminds the team members of the next task in the series. As one auto plan is completed, the next one is assigned.

The following describes how my team assists in the Sales Funnel, moving buyer Leads to client Closings. It highlights the job duties of the

inside sales agent, showing assistant/agent, and transaction coordinator. This example uses three auto plans: the Buyer Lead Auto Plan, the New-Buyer Auto Plan, and the Buyer Pending Auto Plan.

