



Success of Challenge

An Action Plan for Success

Success Challenge

Appearance and Attitude

- First impressions – Dress for success. Smile!
- Optimism – A must to succeed!
- Positive attitude! Negativity shows through the phone.
- Wear your Tucker name badge and Tucker pin wherever you go – people notice!

Creating Your Data Base/Announcement Letters

This is one of your most important tasks. Assemble names, addresses, phone numbers, and places of business in to your data base. Do this task within the first two weeks after completion of training.

- This list will act as the starting point for your calling list, direct mail program, calendars, client prospect list. etc.
- You should send 5 to 10 announcements per day. Send everyone on your data base an announcement letter. You can find these on the Tucker Website and they can be personalized.
- You will find this will be the base of your business if you call, write personal notes and meet face to face, or “pop by” homes of the people on your list over and over. Communication is the key!
Your objective is to not only have an opportunity to convert these people to clients, but also to get these people to think of you and refer possible clients to you. This is a start to building your business by referral. Your data base can and should become your source of business.
- One of the primary work activities will be making face to face or telephone contact with everyone who has been sent an announcement. Follow up to confirm the receipt of the announcement and with an inquiry as to present or future needs for real estate services. This may take up to 30 days to call everyone on your list.
- Three to four days after mailing 5 to 10 announcements, call each of those people. Ask them if they received your letter and remind them again you are with the F. C. Tucker Company and would appreciate their business or referrals.
(Be sure to check the “No Call” Addendum # 1)
- You will be able to print 100 letters in color free of charge.
- After 100 envelopes have been addressed and they are ready to be mailed take them to your office secretary and she will give you free postage for 100 letters.
(The 100 free color copies and mailings are for your announcement letters only)

Business Plan

- Prepare your success by filling out the Business Planning Guide and follow the plan.
- Use the booklet through the year and take to your quarterly review with your manager.

You Must Know Your Real Estate Market Area

Meet with your Manager to determine area/subdivisions. A primary goal should be established of **previewing three** (3) neighborhoods **a month** to determine:

1. Styles
2. Price range
3. Age of homes
4. Prepare a CMA on the neighborhood.

This is an excellent use of your time to educate yourself by previewing current listings in the neighborhood.

Attending your office **Tour of New Listings** is another excellent way to keep up with the market.

(Refer to the "Statistics" Addendum #2)

Open Houses

Learn from your peers by shadowing an agent at a Sunday Open House which will help you learn new ideas and gain self-confidence.

Once you feel comfortable with your technique/style, schedule your own open house for following Sundays.

- Open Houses are available from 12:00-2:00/ 2:00-5:00/ 3:00-5:00.
If you choose to have two open houses a Sunday, make sure you have enough travel time between homes. You may prefer having one open house for a longer period of time.
- We suggest three out of four Sundays per month unless you have scheduled buyers on Sunday.
When you are scheduled for Sunday "Floor/Opportunity Time" do not schedule an open house)
- Start preparing for your open house the **Monday before** the next Sunday's open house.
- Select the open house you want to hold open
- Have your manager confirm the location
- What is your objective?
To get buyers? To get the FSBO near the open house? You may want to consider having an open house in the neighborhood where you are previewing homes while "learning the market".
- Prepare open house invitations and **deliver** to the 5 homes on both sides of the chosen open house and 10 homes across the street.
- Have your manager or ad secretary show you how to write an open house ad.
- Have your manager advise you as to when to put "open house hours" top rider on the yard sign.
- When do you put up directional signs, if allowed?
- Get permission from neighboring home owners to put directional signs in their yards
- Prepare the flyers/information needed for your open house/s.
- Have your Tucker mortgage representative prepare financing information for you to take to the open house.
- Follow up with the visitors by a personal note or phone call, personal visit, (check the "do not call list") the day immediately following the open house.

Floor/Opportunity Time

Shadow an agent on Floor/Opportunity Time. Have your manager help select the best agent for you to observe.

- What do you need to have available?
- Observe what to say when answering the phone
- Observe how to get name and phone number of caller
- Observe how to get information quickly on the computer
- Learn Floor Time procedures
- Learn the office policy for floor: (Ask the receptionist)
 - What if you can not make your floor time?
 - What if you miss floor time?
 - Taking someone else's floor time
 - Floor schedule for the month

Floor Time is **Not** prospecting. It is an **Opportunity for business**

Schedule an Appointment with Your Tucker Mortgage Office Representative

Your representative is more than happy to provide you with ongoing financial education.

- Go over a "Good Faith Estimate" until you understand the content.
(Your mortgage rep. will help you.)
- Find out how your representative wants to be contacted.
- Ask what you as an agent can do to help the mortgage application process with your buyers.
(Remember, when you become a seasoned high producing agent, it only stands to reason that your Tucker mortgage representative, who helped you in the beginning, willing to give you their time, will be generously rewarded with a constant stream of home buyers in need of mortgage financing.)

Shadow your manager or an agent on a Home 'Market Analysis'

The best way to prepare for a listing presentation is to find out information about the home in advance.

- Retrieve property "tax record" from Property Linx.
- Also, search Property "Archive" for history on the property.
 - Was the home sold by another Tucker agent? If so how long ago?
 - Does the Tucker Golden Rule Policy apply?
- What Tucker information is prepared to be left with the homeowner?
- Go with an agent to measure a home, and observe what questions are asked and gathered/recorded.
- How was the listing appointment set? Observe the dialogue.

Shadow Your Manager, or Agent on a Listing Presentation

- **Observe** what your manager takes on the presentation or ask your manager if you can help prepare the data for the presentation.
- **Observe** (not talk) the procedure/dialogues used during the presentation.
- How is the listing presentation booklet used?
- At what point does the price enter the presentation?
- How is the dialogue on commission handled?
- When is the sign put in the yard?
- Observe the showing instructions and lockbox explanation.
- Flyer box and who will keep the box filled with information. Keeping contact with the homeowner throughout the listing period or until closing is important.
- Feedback from showings will normally be received via email from Centralized showings. If not, the agent needs to call the showing agent for feedback.
- The seller will receive the same information on feedback as the agent.
- Price Reductions: If necessary, how is a price reduction received? What information is used to secure the reduction? What dialogue is used?

'New Listing' Office Procedure

Once the listing is signed and all documents completed, the office needs to receive the following information:

- How is the new listing posted?
- Who receives the new listing information?
- How are pictures submitted to BLC?
- How is the information received at the receptionist desk?
- Is there particular information submitted or posted at the 'floor desk'?
- When and how are the ads written for the new listing?
- Is this a home you want to hold open?
- Write the 'open house' ad.

When an "Offer is Received" on the Listing!

- The offer is usually received via email.
- Was earnest money received?
- Observe the procedure to prepare the 'Offer' to be presented to the homeowner.
- What documents are needed?
- Practice preparing a "Seller's Estimated Proceeds" Sheet.
- Is a Counter Offer needed?
- Observe dialogues used when negotiating the counter offer.
- How is the Counter Offer prepared, signatures received and delivered to the co-op agent?

Shadow Your Manager or Agent When He/She Writes an Offer

This is a very important process to learn the art of saying/doing the right thing.

- Observe materials needed
- Listen to dialogue, practice what you hear.
- **Observe** explanation of documents
- Observe how the agreement is written.
- What happens after the agreement is written.
- Communication with Listing Agent
- How is agreement delivered to Listing Agent?
- How are documents finalized, signatures acquired, earnest money check collected, etc. (Earnest money needs to be **delivered** to the listing agent immediately upon acceptance of the agreement.)

Observe Negotiating Procedures/Dialogues For a Purchase Agreement/Counter Offer

- Observe procedure
- How is Buyer Contacted
- What/How is information communicated
- Observe Writing a Counter Offer
- How is Counter Offer delivered.
- What is the office procedure when sale is completed?
- Posting of sale-where?
- Pending check sheet?
- What documents are needed?

Inspections

- Home Inspection
- Septic Inspection
- Well/Water Inspection
- Lead Paint Inspection
- Radon Inspection
- Mold Inspection

Many of the above will need to be completed after the purchase agreement has been accepted and prior to closing.

- Learn the procedure to have the above completed.
- Ask another agent if you may attend an inspection with them to observe.
- Removal of inspection contingency.

Responding to the Inspection

- Once the inspection repair request, if any, is received, observe the time to respond. Remember to always follow the times specified in the purchase agreement.
- If repairs are needed, how are repairs ordered?
- Has Tucker's Home Services been contacted?
- Unless the buyer's mortgage company request repairs to be made, how are the repair requests written?
- What 'addendum' if any, is used?
- Have **all** signatures been received?

Attend a Closing with your Manager or an agent Selected by Your Manager.

Remember the listing agent sets the closing and coordinates the times/dates with both the seller and the co-op agent in the transaction. It is important that all documents are signed, in order and ready for closing. Prior to closing you need...

- Receipt of the HUD/Closing Statement from Title Company.
- Are the figures correct and coordinate with the Good Faith Estimate?
- Have all bills (if any) been turned in and credited?
- For Buyers: Observe how the notification is to the buyer of the amount needed/what kind of check/made payable to whom or wire transfer needed? (Wire transfers are needed for any amounts over \$10,000) Has insurance been purchased? Any additional documents needed by buyer at closing? Have utilities been changed?
- For Sellers: Observe how the notification is to the seller of all figures on the HUD statement and if the seller will be receiving a check or needs to bring a check to closing. Remind sellers of the transfer of utilities and to bring keys and garage door openers.

After the Closing

- Observe the office procedure of what happens with the closed file. Are all documents accounted for as requested on the Pending Check Sheet?
- What do you keep, if anything?
- What documents are needed for the office?
- What happens with the commission check?
- How is your commission received?

Take an experienced agent to breakfast or lunch

- You can learn a lot from an experienced agent.
- Ask them questions that will help you on the road to your success. (Refer to the Addendum #3 "Take an experienced agent to lunch")

Besides doing all of the activities listed above to help build your confidence you need to constantly be:

- Asking people for business
- Passing out business cards
- Writing 5-10 personal notes a day to someone who has helped you or someone you want to compliment. (Refer to the Addendum #4 "Sample Personal Notes" And Addendum #5 "Possible Contacts")
- Attending your office Skill Building Classes
- Recording your weekly activities. (Refer to the Addendum #6 "Successful Activity Summary Report")
- Attending/participating in community activities and networking groups.
- Attending Tucker University classes to help develop your sales skills and increase your real estate knowledge.
- In the office learning by listening to other agents when you are not out prospecting or with buyers or listing homes.
- Learning that you should never allow your learning opportunities to stop.
- Achieving the success you desire by referring often to your Business Planning Guide to help keep you on track.

***"Strive for the space reserved for you.
At the top!"***

Jack O'Connor



F. C. Tucker Professional Sales Academy

9279 North Meridian Street, Indianapolis, Indiana 46260
(317) 571-2200