

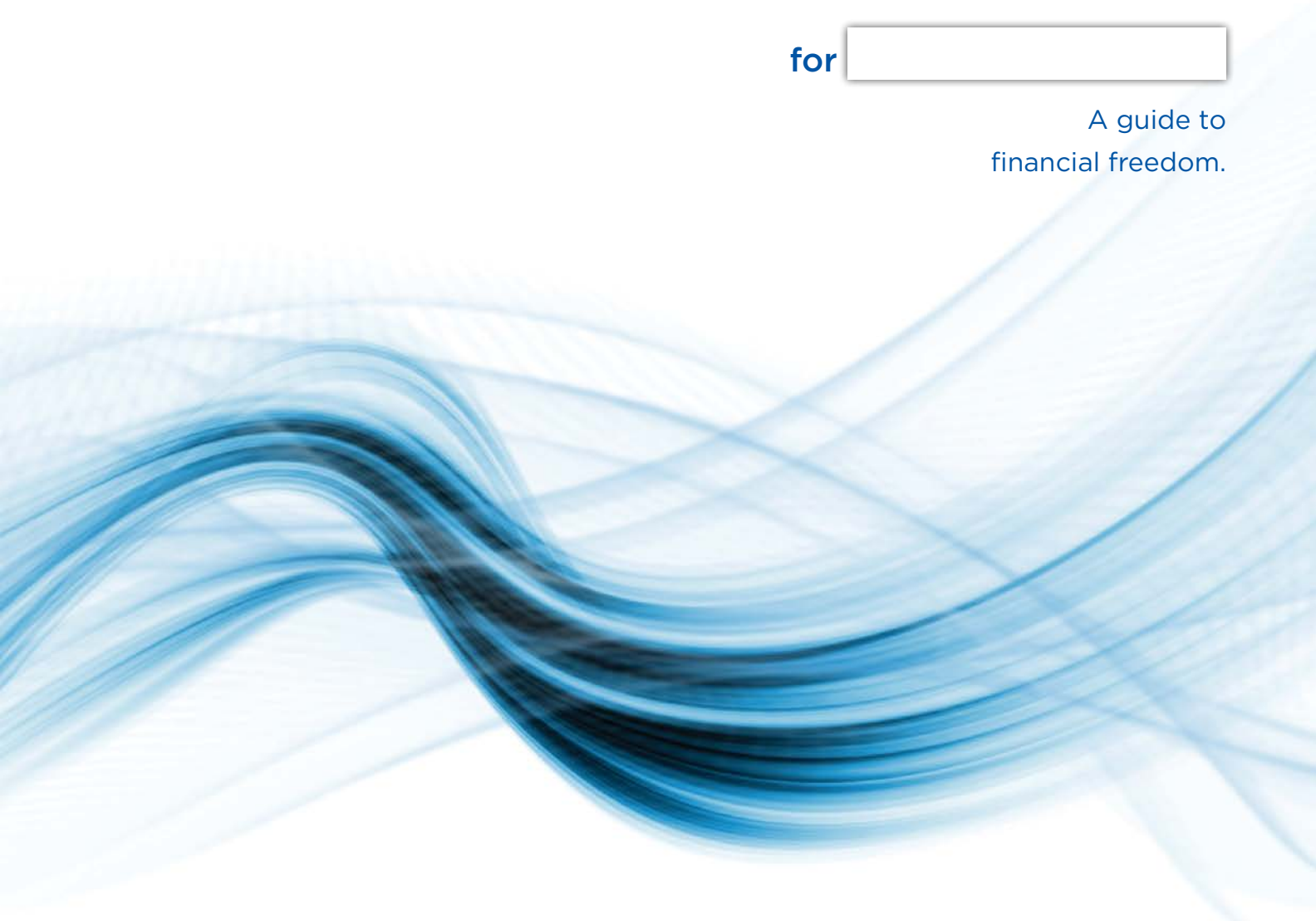
RE/MAX Integrity

# APPRENTICE BUSINESS PLAN

JUMPSTART CLASS

for

A guide to  
financial freedom.



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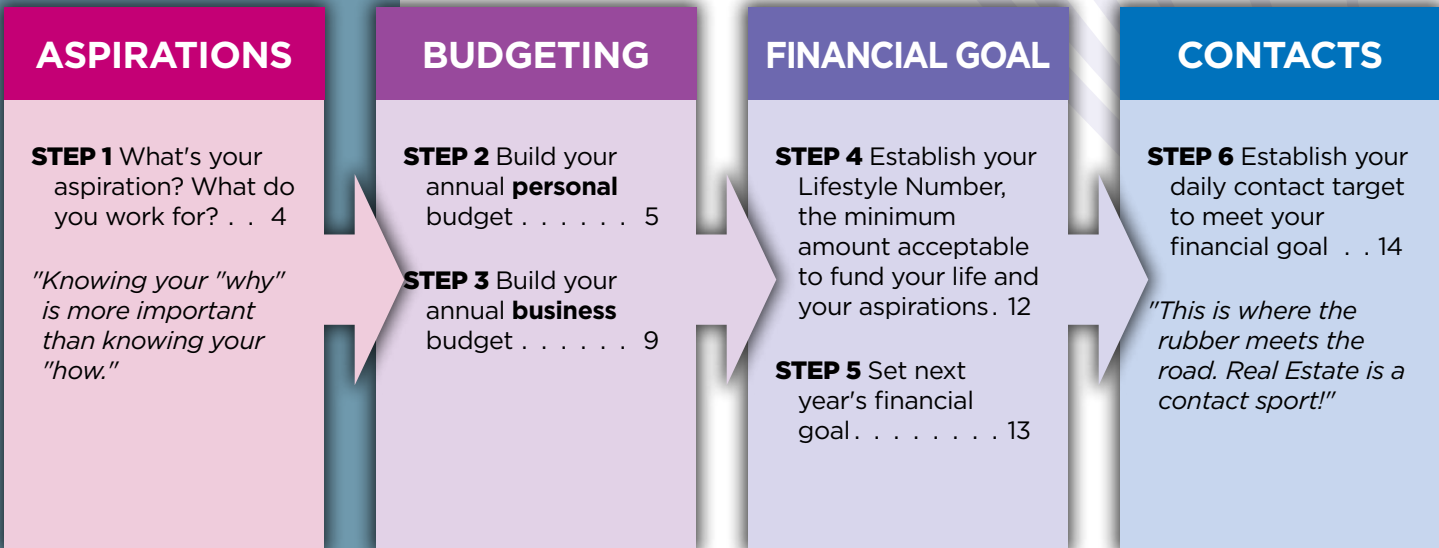
**momentum**<sup>SM</sup>

# THE ENTREPRENEUR'S PATH

This Momentum business plan was developed for RE/MAX Integrity Associates to create a thorough and logical path to follow to achieve their goals and fulfill their life aspirations.

Unlike goal setting, where you pick a number and hope for the best, this comprehensive plan walks you through, step-by-step, a tested and proven process of developing a full, easy-to-follow plan. Moving well beyond an income goal to a daily plan to achieve your goal, followed by tracking, accountability and inspiration to help keep you on your Momentum path.

After this plan is completed, you will have a clear picture of what financial level you need to attain to fund your life. Beyond a dollar figure, you'll discover how many personal contacts you need to make daily to reach your goal.



# THE ENTREPRENEUR'S PATH

Once your financial path is clear, we'll map out your plan to identify exactly what marketing sources and activities will help you meet your goals and what marketing sources and activities to avoid. It's all about focusing on the vital activities to get the desired results.

You will get out of the Momentum system what you put into it. If you complete this guide and do the hard work and obtain the training your plan recommends to become a master in business areas you select to focus on, the sky's the limit. If you complete this guide and do what you've always done, you'll get what you've always gotten.

*Let's get started down your personalized Entrepreneur's Path...*



"Obtaining your goal starts with a crystal clear, specific target and laser focus."

—Kevin

## MARKETING

- STEP 7** Review what worked last year 15
- STEP 8** Select your Marketing Channels . . . . . 16

## TRAINING

- STEP 9** Determine & schedule the Momentum courses to support your Marketing Channels . . . . . 21
  - Lead Generation
  - Lead Conversion
  - Business Courses
  - Online Marketing
  - Master Classes

## ACCOUNTABILITY

- STEP 10** Commit to the tracking system that will allow you to track your success. . . . .24
- STEP 11** Select the accountability plan that fits your business . . . . .25

## INSPIRATION

- STEP 12** Keep inspired with Mastermind Groups . . . . .26
- "Nothing keeps an Associate inspired like attending a RE/MAX R4 Convention."*



# STEP 1: YOUR ASPIRATIONS

"To put my kids through college."

"Toasting our 30th Anniversary on the Eiffel Tower!"

"Retiring at 60"

"Volunteering in a homeless shelter 20 hours a week."



Step one is the most important step. Why do you want to "succeed" anyway? What does success mean to you?

Before we start crunching numbers and getting rich you should know what you want. Do you want more money? Do you want more time?

What would you really do with more money? What would you do with more time?

What are your life's aspirations?

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# STEP 2: YOUR ANNUAL PERSONAL BUDGET

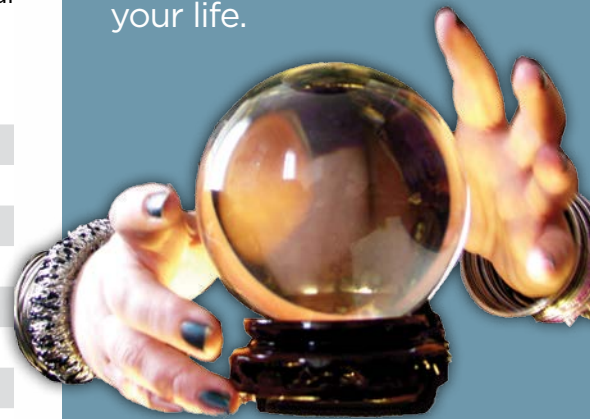
As you work through this budget the first time, just **estimate** your expenses. As you refine it, you can get more exact. For variable bills—like utilities—it’s a good idea to review three to five months worth of bills and use a good monthly average.

This personal budget is a tool for you to help establish what profit your real estate business needs to make to support your personal lifestyle. Perfection is not the goal. **Get close and get started.**

HOME EXPENSES	Priority	Sample	Your Actual
Mortgage/Rent		\$ 18,000	\$
Utilities:			
Gas		\$ 1,200	\$
Electric		\$ 1,800	\$
Water/Sewer		\$ —	\$
Garbage		\$ 600	\$
Internet		\$ 600	\$
Landline Telephone		\$ —	\$
Cell Phone (Personal Use Only)		\$ —	\$
Home Repairs & Maintenance		\$ 1,200	\$
Yard Care		\$ —	\$
Home Security		\$ —	\$
Property Taxes (if not in Mortgage)		\$ incl.	\$
Homeowners/Renters Insurance		\$ 600	\$
Other		\$ —	\$
<b>Total Home Expenses</b>		<b>\$ 34,000</b>	<b>\$</b>

DAILY LIVING EXPENSES	Priority	Sample	Your Actual
Groceries		\$ 4,800	\$
Childcare		\$ —	\$
Dry Cleaning		\$ 720	\$
House Cleaning Service		\$ —	\$
Other		\$ —	\$
Other		\$ —	\$
<b>Total Daily Living Expenses</b>		<b>\$ 5,520</b>	<b>\$</b>

Before you decide how much you “need” to make, you need to know what it costs to fund your life.



Use **Priority "1"** for **must have** items, like mortgage, rent or groceries.

**Priority "2"** is for items you’d **like to have**, like dinners out and cable.

**Priority "3"** is for luxury items you could live without **but don’t want to**, like yard care, housekeeping, etc.



These forms are also available online at [IntegrityAgentsOnline.com](http://IntegrityAgentsOnline.com)  
Go to the Momentum tab, Business Plan, Budget sheet.





## BUSINESS PLAN

# STEP 2: YOUR ANNUAL PERSONAL BUDGET

### DID YOU KNOW

The average American has \$15,611 in **credit card debt**.

The average American aged 45-54 has \$219,000 in **retirement savings**.



The average American family has \$3,800 in a **saving account**.

Many money managers recommend a 3-6 month **emergency fund**.

PERSONAL TRANSPORTATION	Priority	Sample	Your Actual
Gas/Fuel (not work)		\$ 1,200	\$
Auto Insurance		\$ —	\$
Auto Repairs & Maintenance		\$ —	\$
Parking		\$ —	\$
Other		\$ —	\$
Other		\$ —	\$
<b>Total Transportation Expenses</b>		<b>\$ 1,200</b>	<b>\$</b>

FINANCIAL OBLIGATIONS	Priority	Sample	Your Actual
Long-Term Savings		\$ 3,000	\$
Retirement (401(k), IRA, Roth, etc.)		\$ 4,800	\$
Credit Card 1 Payments		\$ 1,200	\$
Credit Card 2 Payments		\$ —	\$
Credit Card 3 Payments		\$ —	\$
Credit Card 4 Payments		\$ —	\$
Credit Card 5 Payments		\$ —	\$
Home Equity Line-of-Credit		\$ —	\$
Auto Loan Vehicle 1 (not work)		\$ —	\$
Auto Loan Vehicle 2		\$ —	\$
Student Loan 1		\$ —	\$
Student Loan 2		\$ —	\$
Tuition		\$ 300	\$
Other		\$ —	\$
Other		\$ —	\$
<b>Total Financial Obligations</b>		<b>\$ 9,000</b>	<b>\$</b>

SUBSCRIPTION EXPENSES	Priority	Sample	Your Actual
Magazines		\$ 400	\$
Newspapers		\$ 600	\$
<b>Total Subscription Expenses</b>		<b>\$ 1,000</b>	<b>\$</b>



# STEP 2: YOUR ANNUAL PERSONAL BUDGET

HEALTH EXPENSES	Priority	Sample	Your Actual
Life Insurance		\$ 960	\$
Health Insurance		\$ 7,800	\$
Dental Insurance		\$ —	\$
Over-the-Counter Drugs		\$ 1,200	\$
Co-Pays, Out of Pocket		\$ 600	\$
Other <i>Dentist</i>		\$ 2,000	\$
Other		\$ —	\$
<b>Total Health Expenses</b>		<b>\$ 12,560</b>	<b>\$</b>

VACATION EXPENSES	Priority	Sample	Your Actual
Plane Fare		\$ 2,000	\$
Accommodations		\$ 2,000	\$
Food		\$ 1,000	\$
Rental Car		\$ 1,000	\$
Other		\$ 1,500	\$
Other		\$ —	\$
<b>Total Vacation Expenses</b>		<b>\$ 7,500</b>	<b>\$</b>

RECREATION/ENTERTAINMENT	Priority	Sample	Your Actual
Cable/TV		\$ 1,800	\$
Netflix, Hulu, etc.		\$ —	\$
Dining Out		\$ 4,000	\$
Gym Fees		\$ 750	\$
Sports Equipment		\$ —	\$
Team Dues		\$ —	\$
Alcohol		\$ —	\$
Cigarettes		\$ —	\$
Gambling		\$ 2,400	\$
Other		\$ 1,200	\$
Other		\$ —	\$
<b>Total Recreation Expenses</b>		<b>\$ 10,150</b>	<b>\$</b>

Remember, **it doesn't have to be perfect.** A good guess is okay the first time through.

## DID YOU KNOW

The average **plane ticket** from Oregon to Vegas runs about \$350.00



The average **three star hotel** in a major city costs about \$350.00 per night.

The average monthly cost for **health insurance** is \$467.91 for an individual or \$1,312.00 for a family.



These forms are also available online at [IntegrityAgentsOnline.com](http://IntegrityAgentsOnline.com)  
Go to the Momentum tab, Business Plan, Budget sheet.

# STEP 2: YOUR ANNUAL PERSONAL BUDGET



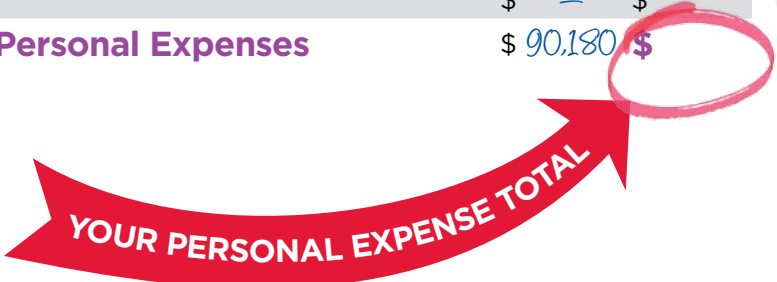
“You can make all the money in the world, but if you **don't monitor your expenses** you'll never have enough.”

—**Barb Thomas**  
Eugene

PERSONAL EXPENSES	Priority	Sample	Your Actual
Clothing		\$ 3,600	\$
Gifts (Birthdays, Holidays, etc.)		\$ 2,400	\$
Personal Care (Salon, Barber, Nails)		\$ 1,200	\$
Books		\$ —	\$
Music		\$ 150	\$
Other		\$ 1,200	\$
Other		\$ —	\$
<b>Total Personal Expenses</b>		<b>\$ 7,550</b>	<b>\$</b>

MISCELLANEOUS EXPENSES	Priority	Sample	Your Actual
Charity/Donations		\$ 500	\$
Pet Expenses		\$ —	\$
Fun for Me		\$ 1,200	\$
Other		\$ —	\$
Other		\$ —	\$
<b>Total Miscellaneous Expenses</b>		<b>\$ 1,700</b>	<b>\$</b>

PERSONAL BUDGET SUMMARY	Sample	Your Actual
Home Expenses	\$ 34,000	\$
Daily Living Expenses	\$ 5,520	\$
Transportation Expenses (Personal)	\$ 1,200	\$
Financial Obligations	\$ 9,000	\$
Subscription Expenses	\$ 1,000	\$
Health Expenses	\$ 2,560	\$
Vacation Expenses	\$ 7,500	\$
Recreation & Entertainment Expenses	\$ 10,150	\$
Personal Expenses	\$ 7,550	\$
Miscellaneous Expenses	\$ 1,700	\$
Other	\$ —	\$
Other	\$ —	\$
Other	\$ —	\$
<b>Total Personal Expenses</b>	<b>\$ 90,180</b>	<b>\$</b>





# STEP 3: YOUR BUSINESS BUDGET

The following pages outline a **business** budget. It is this budget that will provide the key to what your business needs to fund your life. Once this is established, you'll know exactly how much profit your business will make. In the steps that follow, you'll be able to develop a concise plan to meet that target.

In addition to the forms where you can determine your budget, we've provided industry benchmarks for business expenses. These benchmarks are for reference only; your income and expenses will vary. And as with the personal budget, perfection is not the goal.

AUTO EXPENSES	Sample	Your Actual
Auto Loan/Lease Payment	\$ 4,800	\$
Auto Insurance	\$ 700	\$
Gas	\$ 3,600	\$
Repairs	\$ 500	\$
Maintenance	\$ —	\$
Washing & Detailing	\$ 500	\$
DMV	\$ 100	\$
Other	\$ —	\$
<b>Total Auto Expenses</b>	<b>\$ 10,200</b>	<b>\$</b>

TRAVEL/ENTERTAINMENT EXPENSES	Sample	Your Actual
Transportation (Airfare, Car Rental, etc.)	\$ 700	\$
Lodging (Hotels, etc.)	\$ 2,100	\$
Meals/Entertainment	\$ 3,000	\$
Event Registrations	\$ 800	\$
Convention Registrations	\$ 450	\$
<b>Total Travel/Entertainment Expenses</b>	<b>\$ 7,050</b>	<b>\$</b>



These forms are also available online at [IntegrityAgentsOnline.com](http://IntegrityAgentsOnline.com)  
Go to the Momentum tab, Business Plan, Budget sheet.

## ASSUMPTIONS

- You'll **close 10 transactions** your first year. While 10 is less than half the overall company average, it's conservatively realistic for the first year.
- You'll **have a network of approximately 100 people** that you'll market to monthly (using Marketing You or any other monthly mailing contact system).
- You have **a monthly auto payment of \$200.00**

If you know that your business expenses are going to be different, you should use the numbers you feel better reflect your budget.

## BUSINESS PLAN

# STEP 3: YOUR ANNUAL BUSINESS BUDGET

Figure what it costs to market the average listing so you can **budget listing expenses**.



The amount of money spent on a **well-executed marketing campaign** to your network (sphere) gives you the most bang for your buck.

<b>NETWORK (Sphere) MARKETING</b>	<b>Sample</b>	<b>Your Actual</b>
Client Event 1:	\$ 3,000	\$
Client Event 2:	\$ —	\$
Pop-By Gifts	\$ 300	\$
Client Gifts & Personal Cards	\$ 900	\$
Marketing You or Other Mailings	\$ 2,000	\$
Postage	\$ 100	\$
<b>Total Network (Sphere) Marketing Expenses</b>	<b>\$ 6,300</b>	<b>\$</b>

<b>NON-NETWORK (Non-Sphere) MARKETING</b>	<b>Sample</b>	<b>Your Actual</b>
Just Listed/Just Sold Postcards	\$ 1,200	\$
Mailing to Geographic Farm	\$ —	\$
Mailing to Demographic Farm	\$ —	\$
Billboards	\$ —	\$
Sponsorship of Group or Team	\$ —	\$
Networking or Leads Group	\$ 1,200	\$
Civic Organization	\$ —	\$
Purchase Leads (i.e. Zillow.com)	\$ 2,400	\$
<b>Total Non-Network Marketing Expenses</b>	<b>\$ 4,800</b>	<b>\$</b>

<b>PROPERTY-SPECIFIC MARKETING</b>	<b>Sample</b>	<b>Your Actual</b>
Sign Purchase & Install	\$ 600	\$
Flyers	\$ —	\$
Ads in Newspapers	\$ —	\$
Ads in Magazines	\$ —	\$
Virtual Tours	\$ —	\$
Photos	\$ 1,500	\$
Staging	\$ 500	\$
Online Ads/Placements (i.e. Realtor.com)	\$ 1,200	\$
Feedback Software	\$ 120	\$
<b>Total Property-Specific Marketing Expenses</b>	<b>\$ 3,920</b>	<b>\$</b>

<b>BUSINESS SAVINGS ACCOUNT</b>	<b>Sample</b>	<b>Your Actual</b>
Savings Account	\$ 2,400	\$
<b>Total Savings Expense</b>	<b>\$ 600</b>	<b>\$</b>



# STEP 3: YOUR BUSINESS BUDGET

ADMIN EXPENSES	Sample	Your Actual
Education/Coaching	\$ 1,200	\$
MLS Dues	\$ 720	\$
Loop Net/Costar Dues (Commercial Only)	\$ —	\$
Realtor® Association Dues	\$ 550	\$
Designation Dues (CRS, CDPE, etc.)	\$ —	\$
License Renewal Fee	\$ 125	\$
Accounting Fees	\$ 400	\$
Printing/Copies	\$ 150	\$
Supplies	\$ 500	\$
Assistant Services (Transactions/Listings)	\$ —	\$
Business Cards & Stationery	\$ 100	\$
<b>Total Admin Expenses</b>	<b>\$ 3,745</b>	<b>\$</b>

TEAM EXPENSES	Sample	Your Actual
Salaries and Wages, including Taxes	\$ 12,000	\$
Payroll Service Fees	\$ —	\$
Health/Dental Insurance	\$ —	\$
401(k) Expenses	\$ —	\$
Extra Space Expense	\$ —	\$
<b>Total Team Expenses</b>	<b>\$ 12,000</b>	<b>\$</b>

BUSINESS BUDGET SUMMARY	Sample	Your Actual
Auto Expenses	\$ 10,200	\$
Travel/Entertainment Expenses	\$ 7,050	\$
Network (Sphere) Marketing Expenses	\$ 6,300	\$
Non-Network (Non-Sphere) Marketing	\$ 4,800	\$
Property Marketing Expenses	\$ 3,920	\$
Business Savings Account	\$ 6,000	\$
Admin Expenses	\$ 3,745	\$
Team Expenses	\$ 12,000	\$
<b>Total Business Expenses</b>	<b>\$ 54,015</b>	<b>\$</b>

**YOUR BUSINESS EXPENSE TOTAL**

A huge benefit in launching a real estate career vs other industries is that while having some seed money is important, **hard work & persistence are far more important than money.**



## BUSINESS PLAN

# STEP 4: YOUR ANNUAL LIFESTYLE NUMBER

### DID YOU KNOW

Per the 2014 NAR Member Profile, the **median income of an agent** is \$45,800.

**RE/MAX Integrity's, average agent income is \$138,400!**

Per the NAR Member Profile the **median income of an agent in the business over 15 years** is \$68,800.

**RE/MAX Integrity's average income for the same group is over \$194,000!**

**RE/MAX Integrity's agent income is**

# 3X

**the average Realtor.®**

Per the NAR Member Profile... **25% of the agents in NAR make less than \$20,000 per year.**

**25% of the agents in NAR make more than \$100,000 per year.**

The average agent in the business less than two years makes \$9,100.

## Establish Your Lifestyle Number

The minimum profit that's acceptable for your business to generate.

	Sample	Your Actual
1. Annual, Budgeted <b>Personal</b> Expenses <i>(From page 8.)</i>	\$ <u>90,180</u>	\$ _____
2. Annual, Budgeted <b>Business</b> Expenses <i>(From page 11.)</i>	\$ <u>54,015</u>	\$ _____
3. Net Income Needed <b>after</b> Taxes and Company Contribution <i>(Add lines 1 and 2, above.)</i>	= \$ <u>144,195</u>	\$ _____
4. Enter Your Multiplier* <i>(Use 1.30 if line 3 is \$0 to \$75,000, Use 1.35 if line 3 is \$75,001 to \$150,000, Use 1.40 if line 3 is \$150,000 and up.)</i>	x <u>1.35</u>	x _____
5. Gross Commission Income Needed to Fund Your Lifestyle <i>(Multiply line 3 by line 4.)</i>	= \$ <u>194,663</u>	\$ _____

**YOUR LIFESTYLE NUMBER**

When you achieve your Lifestyle Number and manage your personal and business expenses, you can fund your life and your aspirations!

\*Your multiplier is an estimate of the amount you need to "gross up" your commission to cover taxes and your company contribution. This multiplier is for guidance only and is not for tax planning purposes.

# STEP 5: YOUR FINANCIAL GOAL

Next Year's Financial Goals	Sample	Your Actual
1. Your Lifestyle Number: <i>(The amount you need to fund your life—from page 12.)</i>	\$ <u>194,663</u>	\$ _____
2. Your Average Commission per Side Last Year: <i>(Was last year typical?)</i>	\$ <u>6,000</u>	\$ _____
3. Number of Closed Transactions Needed Next Year: <i>(#1 divided by #2 and round up.)</i>	<u>33</u>	_____
4. Percent of Sides that You Plan to Be Listings: <i>(Was last year typical?)</i>	<u>50</u> %	_____ %
5. Number of Closed Listing Sides Needed for Your Goal: <i>(#3 times #4 and round up.)</i>	<u>17</u>	_____
6. Number of Listings Taken, Needed for Goal: <i>(Divide #5 by .75, assuming only 75% will close next year.)</i>	<u>23</u>	_____
7. Number of Listings <b>Appointments</b> , Needed for Goal: <i>(Divide #5 by .75 assuming, you'll list 75% of them.)</i>	<u>30</u>	_____
8. Number of New, Closed Selling Sides Needed for Your Goal: <i>(Subtract #5 from #3, above.)</i>	<u>16</u>	_____
9. Number of Buyers You Need to Work with to Reach Selling Side Goal: <i>(Divide #8 by .75, assuming 75% close.)</i>	<u>22</u>	_____
10. Number of Clients Needed to Meet Next Year's Goal <i>(Add #7 and #9, above.)</i>	<u>52</u>	_____

## Here's your numbers\* from last year:

Gross Sales \_\_\_\_\_

Commissions: \_\_\_\_\_

Avg. Commission per Side: \_\_\_\_\_  
*(without Referral Income)*

Listing Sides Closed: \_\_\_\_\_

Listing Sides Pending: \_\_\_\_\_

Sales Sides Closed: \_\_\_\_\_

Sales Sides Pending: \_\_\_\_\_

Avg. Commission Rate for Listing Sides: \_\_\_\_\_

Avg. Commission Rate for Sales Sides: \_\_\_\_\_

Avg. Commission Rate Overall: \_\_\_\_\_

After your first year in the business you'll get a custom report that includes these figures.

\*Numbers are actual data for Nov. 15, 2014 through Nov. 14, 2015.

# TIP

If you're new to the business, use 75% of the average commission per side for your office (at right). And assume 70% of your sides will be sales and the remaining 30% will be listings. These assumptions are averages to help apprentice brokers plan for the year.

Average commission per side by office last year was:

- \$4,941 Albany
- \$5,821 Corvallis
- \$6,057 Eugene
- \$5,277 Salem





# STEP 6: YOUR DAILY CONTACT TARGET

## WHAT'S A CONTACT?

The following activities count as contacts:

- 1) **Face-to-Face**, one-on-one conversations where you talk about real estate at some point.
- 2) **Phone Calls**, where you speak to someone live—messages don't count!
- 3) **A Personal Text** exchange that results in a two-way conversation.
- 4) **A Hand-Written Note**
- 5) **A Personal Email**

It's been proven that a phone call is most effective—second only to a deliberate, planned, face-to-face contact.

## Calculate Your Daily Contact Target

Various real estate coaching companies and Integrity's own tracking have shown that you'll need about 35 prospect contacts for every client. Assuming you work five days a week and fifty weeks a year, you can then use your Financial Goal from the previous page to calculate how many contacts you need to make.

	Your Sample	Actual
1. Total Clients Needed to Reach Your Goal: <i>(#10 from page 13)</i>	52	
2. Contacts Needed to Get a Client:	35	35
3. Annual Contacts Needed to Reach Your Goal: <i>(Multiply #1 by #2.)</i>	1,820	
4. Daily Contacts Needed 5 Days per Week to Reach Your Goal: <i>(Divide #2 by 250 and round up to whole number.)</i>	8	



## What's a Daily Contact Worth?

Lifestyle Number from page 12	Annual Contacts Needed from line 2, above	Dollar Value of Each Contact
\$ <input type="text"/>	÷ <input type="text"/>	= \$ <input type="text"/>
194,663 <i>(Sample Data)</i>	1,820 <i>(Sample Data)</i>	107 <i>(Sample Data)</i>

Please provide a copy of this page to your Principal Broker

Associate Name: \_\_\_\_\_

# STEP 7: WHAT WORKED LAST YEAR?

This section is designed to help you take a few moments and look back at your marketing sources from last year. This recap will serve as a guide as you select this year's Marketing Channels.

Source	Sides		% of Sides	
	Sample	Your Actual*	Sample	Your Actual*
Network (Repeats/Sphere/Referral)	20	_____	74	_____
LeadStreet (remax.com)	2	_____	7	_____
Personal Website	—	_____	—	_____
Paid Online Leads	—	_____	—	_____
Sign Calls	1	_____	4	_____
Print Ad Calls	—	_____	—	_____
Open Houses	1	_____	4	_____
Direct Mail	—	_____	—	_____
Expired Listings	—	_____	—	_____
FSBOs	—	_____	—	_____
REOs	—	_____	—	_____
Relocations	—	_____	—	_____
Company Referrals	—	_____	—	_____
Vendor Referrals (Lender, Title, etc.)	—	_____	—	_____
Realtor® Referrals	—	_____	—	_____
Leads Group	—	_____	—	_____
Civic Organization	—	_____	—	_____
Other	3	_____	11	_____
<b>Grand Total of Sides Closed</b>	<b>27</b>	<input type="text"/>	<b>100</b>	<b>100%</b>

After your first year in the business you'll get a custom report that shows where your business came from in the past year.

While past marketing sources may not exactly predict future



sources, **looking back** does show where your business has come from in the past.

\*Numbers are actual data for Nov. 15, 2014 through Nov. 14, 2015.



# STEP 8: MARKETING CHANNELS



“Looking back at my previous years’ marketing sources lets me better plan for the next year. I’m able to **better focus on the activities that bring results.**”

—Jan Sohlman  
Eugene

Successful Entrepreneurs select no more than three marketing areas to focus on. If you select more than three areas, you risk losing focus altogether. As you consider what Marketing Channels to pursue from the list that follows, look where your business has come from in the past as a guide to future success.

In addition to the all-important Network Marketing Channel (pre-checked at right) select 1-2 additional Channels you are going to focus on. You’ll see the tasks you need to do and the tools to help with those tasks. In addition to the tasks and tools, each Channel has recommended Momentum courses to attend. These courses have been tailor-made to support the Channels you choose.

Marketing Channels	Page
<b>Channel 1</b> Working Your Network (Your Sphere) . . . . .	17
<b>Channel 2</b> Open Houses . . . . .	17
<b>Channel 3</b> FSBO’s . . . . .	17
<b>Channel 4</b> Expired Listings. . . . .	18
<b>Channel 5</b> Participate in Leads Groups. . . . .	18
<b>Channel 6</b> Just Listed/Just Sold Marketing . . . . .	18
<b>Channel 7</b> Purchase Online Leads or Pay-per-Click . . . . .	18
<b>Channel 8</b> Demographic Farming. . . . .	19
<b>Channel 9</b> Geographic Farming . . . . .	19
<b>Channel 10</b> Home Seller Seminars . . . . .	19
<b>Channel 11</b> Marketing Plan for Renters to Buy . . . . .	20
<b>Channel 12</b> Marketing Plan for Rental Owners . . . . .	20
<b>Channel 13</b> Home Buyer Seminars . . . . .	20
<b>Channel 14</b> Build a Productive and Profitable Team. . . . .	20

# STEP 8: MARKETING CHANNELS

## ✓ Channel 1: Working Your Network (Sphere)

Tasks	Tools
Snail Mail Monthly	Marketing You Program
Make & Document Daily Calls	LeadStreet or other CRM/Scorecard
Write Notes Daily	LeadStreet or other CRM/Scorecard
Do Pop-Bys	LeadStreet or other CRM/Scorecard
Have Client Event	Integrity Sponsored Client Events
Birthday Cards to Adults	LeadStreet or other CRM/Scorecard
Birthday Cards to Kids	LeadStreet or other CRM/Scorecard
House Anniversary Cards	LeadStreet or other CRM/Scorecard
Personal Emails	LeadStreet or other CRM/Scorecard
Personal Texts	LeadStreet or other CRM/Scorecard

**Recommended Classes:**

Referral Bootcamp, Peak Producers, Buffini TV, Advanced Facebook Bootcamp

## ■ Channel 2: Open Houses

Tasks	Tools
Select the Right Properties	MLS Data
Promote the Event	RE/MAX Site/Signage/Craigslist/Print
Invite Neighbors	DesignCenter Postcards
Post Open House Follow-Up	LeadStreet Drip Campaign
Have Financial Cost Sheets	Lender of Your Choice
Prepare Property Flyers	DesignCenter or Marketing Dept.

**Recommended Classes:**

Open House Bootcamp, Buyer Conversion

## ■ Channel 3: FSBO's

Tasks	Tools
Find FSBO's	Zillow/Craigslist/Newspaper
Have Drip System for Follow-Up	LeadStreet or Other CRM
Track Correspondence	LeadStreet or Other CRM
Professional Listing Presentation	Integrity Marketing

**Recommended Classes:**

FSBO Bootcamp, Listing Conversion, Listing Objections Bootcamp, Pricing Bootcamp

On average, Integrity

Associates' business

comes **73% from their**

**network**

**(sphere).**



As Associates gain

longevity in the business,

that percent **keeps rising.**

# STEP 8: MARKETING CHANNELS



“By focusing

on our network of past

clients and friends

**we get to work with**

**people we like** and

make a great living at

the same time.”

—Roger & Trevor Elliott  
Salem

## ■ Channel 4: Expired Listings

Tasks	Tools
Find Expireds	MLS
Have Drip System for Follow-Up	LeadStreet or Other CRM
Track Correspondence	LeadStreet or Other CRM
Professional Listing Presentation	Integrity Marketing

### Recommended Classes:

Expired Bootcamp, Listing Conversion, Listing Objections Bootcamp, Pricing Bootcamp,

## ■ Channel 5: Participate in Leads Groups

Tasks	Tools
Select the Right Group	Ask Colleagues/Get References
Attend Regularly	Calendar Software
Market Yourself to Group	DesignCenter/LeadStreet

### Recommended Classes:

Referral Bootcamp, Power of Presence

## ■ Channel 6: Just Listed/Just Sold Marketing

Tasks	Tools
Find Just Listed in Desired Area	MLS
Find Just Sold in Desired Area	MLS
Snail Mail Postcards	DesignCenter/Marketing Dept.
Follow-Up on Inquiries	LeadStreet or Other CRM

### Recommended Action:

(Meet with Marketing Department to automate.)

## ■ Channel 7: Buy Online Leads/Pay-per-Click

Tasks	Tools
Get Feedback on Platforms	Ask Colleagues/Reviews
Develop Incubation System	LeadStreet or Other CRM
Track Success Rate	Business Plan Source Code

### Recommended Classes:

Marketing Bootcamp, Maximize Online Exposure



# STEP 8: MARKETING CHANNELS

## ■ Channel 8: Demographic Farming

Tasks	Tools
Identify Farm Area	County Records
Advertise to Farm	DesignCenter/Marketing Dept.
Drip to Farm	LeadStreet or Other CRM
Monitor Correspondence	LeadStreet or Other CRM
Monthly Newsletter to Farm	DesignCenter/Marketing Dept.

**Recommended Classes:**

Marketing Bootcamp,  
Buyer Conversion, Social Media Bootcamp

## ■ Channel 9: Geographic Farming

Tasks	Tools
Identify Farm Area	County Records
Advertise to Farm	DesignCenter/Marketing Dept.
Drip to Farm	LeadStreet or Other CRM
Monitor Correspondence	LeadStreet or Other CRM
Monthly Newsletter to Farm	DesignCenter/Marketing Dept.

**Recommended Classes:**

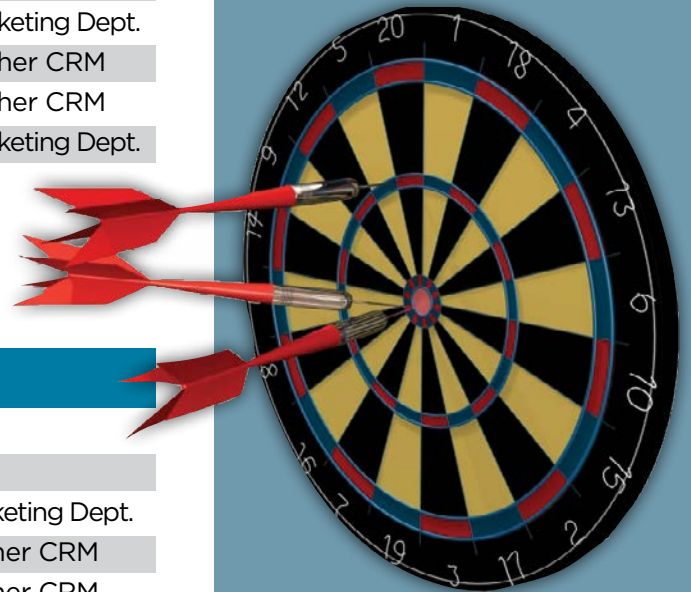
Marketing Bootcamp, Social Media Bootcamp

## ■ Channel 10: Home Seller Seminars

Tasks	Tools
Select Venue	Office
Select Target Invites	Rental Homes/Apartments
Advertise	DesignCenter/Social Media

**Recommended Classes:**

Power of Presence, Social Media Bootcamp



"Target the efforts that yield a **higher return on your investment**, whether time or money."

# STEP 8: MARKETING CHANNELS



“Pick channels you enjoy. **If you enjoy what you do, the money will come.**”

—Aleya Murphy  
Albany

## ■ Channel 11: Marketing to Rental Owners

Tasks	Tools
Identify Landlords	County Records/Title Company
Contact Landlords	DesignCenter
Follow-Up and Drip	LeadStreet or Other CRM

**Recommended Classes:**  
Marketing Bootcamp

## ■ Channel 12: Marketing to Renters

Tasks	Tools
Identify Renters	County Records
Market to Renters	DesignCenter
Follow-Up and Drip	LeadStreet or Other CRM

**Recommended Classes:**  
Marketing Bootcamp, Buyer Conversion,  
Social Media Bootcamp

## ■ Channel 13: Home Buyer Seminars

Tasks	Tools
Select Venue	Office
Select Target Invites	Rental Homes/Apartments
Advertise	DesignCenter/Social Media

**Recommended Classes:**  
Buyer Conversion,  
Power of Presence, Social Media Bootcamp

## ■ Channel 14: Build a Profitable Team

Tasks	Tools
Assess whether You're Ready	Your Principal Broker
Establish Organizational Model	Integrity Team Guide
Develop Job Descriptions	Integrity Team Guide
Establish Compensation Agreements	Integrity Team Guide
Interview and Hire	Integrity Team Guide

**Recommended Classes:**  
Team-Building Series, Position Your Business to Sell

# STEP 9: MOMENTUM TRAINING

## Which Marketing Channels Did You Select?

What two-to-three Marketing Channels from the previous pages will be your focus next year?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Now simply check the courses your Channels require and watch for those courses to be offered in the office.

## Lead Generation Courses

**✓ EXPIRED BOOTCAMP** Teaches the Call-to-Close method, a very direct and proactive approach to working expired listings over the phone. Dialogue is taught in a progressive manner, helping each associate become comfortable and confident with the technique. Associates will learn how to add from 1 to 3 listings per week to their inventory.

**✓ FSBO BOOTCAMP** Teaches the Five-Step-Follow-Up method, a complete, non-threatening approach to effectively working For Sale by Owners. Associates will learn how to pro-actively solicit, follow up with and close FSBOs in a way that adds value to all.

**✓ OPEN HOUSE BOOTCAMP** Teaches the Label-the-Looker method, a complete, non-threatening approach to conversing and following up with open-house attendees. Associates will learn how to advertise and hold highly effective and productive open houses. In-home and follow-up scripts will be discussed thoroughly.

**✓ MARKETING BOOTCAMP** Teaches the Who-Do-You-Know method, a very simple and proactive approach to working neighbors who live around just-listed and just-sold properties, the Label-the-Caller method, a focused and effective approach to answering yard sign and ad calls and the Smart Farm method for choosing and servicing fruitful farm areas.

**✓ REFERRAL BOOTCAMP** Teaches a unique 33-Touch program, which helps Associates increase their referral based business. Associates learn how to pro-actively stay in flow with friends, family and past clients through mailings, phone calls and social media.

## Lead Conversion Courses

**✓ LISTING CONVERSION** Teaches a proven, professional listing conversation. The five stages of an effective listing conversation are covered in detail. Attendees will be exposed to professional scripts and tools designed to set them apart from their competition. Plans, scripts and tools are provided.

**✓ LISTING OBJECTIONS BOOTCAMP** Teaches a non-confrontational approach to overcoming common seller objections. Associates learn how to respond with confidence and without hesitation to the most common seller questions, objections and concerns. Plans and scripts are provided.

**✓ PRICING BOOTCAMP** Teaches the unique Seven-Step Pricing Strategy™. After attending this class, Associates will feel confident in their ability to help sellers arrive at the most appropriate entry-point price while at the same time adding greatly to their value proposition as a listing consultant.

**✓ BUYER CONVERSION** Teaches Associates the five stages of effectively working with buyers. Associates learn a complete "Buyers Process," which covers how to facilitate a buyer conversation, identify appropriate properties, prepare showing packages, show homes, overcome common buyer hesitations and close the sale.

These 9 Core

Classes and the 4

on the next page

are **recommended**

**for all apprentice**

**Associates.** As you

attend the weekly

Momentum Core

Classes during your

first three months,

you'll rotate through

all of them!

# STEP 9: MOMENTUM TRAINING

The Momentum program is designed for you to take each of the recommended courses **three times** to reach mastery.



"Every time I repeat Buffini, I get something out of it. I've made it an annual tradition.

**And it's paid!"**

—Colin Call  
Eugene

## Business Courses

✓ **REAL ESTATE SALES PERSPECTIVE PART 1** Associates learn the two irrefutable facts of real estate and the unique entrepreneurial approach. Fact #1: Real Estate Sales is a GET RICH Business. Discusses the difference between being busy, productive and mastering your skill. Your thoughts matter in your overall success. If you want to grow your business to the next level you must do things differently and focus on the right activities. Teaches Associates the difference between knowing and growing.

✓ **REAL ESTATE SALES PERSPECTIVE PART 2** Fact #2: Real Estate is BASIC. Teaches how to build a plan to achieve your aspirations and non-negotiable Lifestyle Number through plans and strategy.

✓ **ACTIVITIES MANAGEMENT** Provides an overview of the career-changing Activities Management System (A.M.S.), along with an introduction to the three phases of a successful business. Associates are challenged to discard the time-management myth and embrace the use of vital time blocks.

✓ **BUFFINI PEAK PRODUCERS** This 13 week series is delivered with a mix of high energy and entertaining video instruction as well as live classroom instruction. The entire series focuses on how to leverage your network (sphere) to generate repeat and referral business. This activities based program has benefited top producing Integrity Associates time and time again. Each weekly session is two hours and includes weekly action steps. Starts 9/18 and runs for 13 weeks.

# STEP 9: MOMENTUM TRAINING

## Digital Marketing Courses

❑ **SOCIAL MEDIA BOOTCAMP** This training class is a small, hands-on workshop that introduces Associates to the most effective social media platforms to complement their real estate career. In addition to an overview on social media platforms, Associates will work with the instructor to actually build their profile on some or all of the platforms covered.

❑ **ADVANCED FACEBOOK** This workshop helps Associates enhance their Facebook business page with strategies on how to get more of their network interacting with their business page, how to use scheduled posts for hassle-free management and how to personally connect with your network. Social Media Bootcamp is a prerequisite to this course.

❑ **MAXIMIZING YOUR ONLINE EXPOSURE** Shows and assists Associates in how to maximize their exposure using online media. This course covers strategies to boost online exposure as well as how to manage your online reputation with consumer review sites. Acknowledging leads are a huge aspect of online exposure.

❑ **BUILDING YOUR MOBILE BRAND** Associates will leave this workshop-style class with a new custom look to their Integrity provided website, mobile website and mobile app. Participants learn how to add custom links, change the look of their site to fit their style as well as strategies to drive consumers to their personal website using mobile technology.

## Master Courses

❑ **TEAM BUILDING SERIES** Teaches experienced Associates how to leverage themselves through team-building. Associates receive complete job descriptions, interview forms, interview questions, behavioral assessments and performance expectations for the purpose of hiring personal assistants, closing coordinators, listing coordinators, marketing coordinators, runners, buyer's specialists, listing specialists and team leaders.

❑ **POSITION YOUR BUSINESS TO SELL** This course outlines systems and strategies to sell your real estate practice. The course will cover not only the "what" to do and how to do it, but also show a formula for pricing your business to sell. It is recommended that brokers take this course at least one year in advance of the day you plan to exit the business.

❑ **SELF-DIRECTED IRA'S** This course explores the upsides and downsides of buying real estate and other non-cash assets in a self-directed retirement account such as an IRA. Often cited as a great way to defer taxes, this course drills down to the nuts and bolts and determines at what level, if any, a self-directed IRA makes sense.

**New!**



"Going to courses at other Integrity offices is a great chance to network, get fresh ideas and get referrals."

—D'arcy Martin  
eMarketing Coach



# STEP 10: ACCOUNTABILITY —COMMIT TO TRACKING



“Tracking works!

I track all the personal contacts I make. I can

predict my closed transactions for the

year based on how

many notes, pop-by’s

and calls I make.”

—Samantha Alley  
Corvallis

## Commit to Tracking

Now that you have completed your business plan, you’re ready for the rubber to meet the road—doing the action steps your plan outlines!

As with any new plan, the focus and excitement can wane as time passes. It is for this reason that we recommend you track your daily activity.

Tracking shows your progress and helps keep you on track.

**Daily Activity Tracker**

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Daily Contact Goal: \_\_\_\_\_

Personal Notes:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Pop-by's (face to face):

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Calls:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Personal Emails/Texts:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Client Lunch: \_\_\_\_\_

Additions to Data Base:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Daily Contact Achieved: \_\_\_\_\_

Powered by **momentum**



\*These forms are also available online at [IntegrityAgentsOnline.com](http://IntegrityAgentsOnline.com)  
Go to the Momentum tab, Business Plan, Budget sheet.

# STEP 11: ACCOUNTABILITY —PICK YOUR FIT

## Accountability works!

Experience has shown that successful accountability is done with other like-minded and like-production individuals. It is for this reason that Integrity offers accountability specific to your production level versus a one-size-fits-no-one format.

- **APPRENTICE ACCOUNTABILITY:** This group meets weekly for one hour and combines all apprentice associates for all four Integrity locations. This coming together of all four offices allows for accountability as well as instruction tailored to the needs of newer Associates. *Qualifications:* Associate has been in the business less than six months and has completed—or is in the process of completing—the JumpStart series.
  - **EXECUTIVE CLUB ACCOUNTABILITY:** This group meets weekly in each office for 30-60 minutes depending on group size. *Qualifications:* In the business six months or more and have annual closed commissions up to \$99,900.
  - **100% CLUB ACCOUNTABILITY:** This group meets weekly in each office for 30-60 minutes depending on group size. *Qualifications:* Associates have annual commissions in between \$100,000-\$250,000.
- Depending on office dynamics and each office culture, the Principal Broker may combine the Executive Club and 100% Club sessions into one group to maximize effectiveness for Associates.*
- **PLATINUM CLUB+ ACCOUNTABILITY:** This Accountability level is provided one-on-one in monthly, 30 minute sessions with the Principal Broker. In addition to the one-on-one the Associate may also attend any group session for the Executive or 100% Club as well if they prefer the group dynamic. *Qualifications:* Associates have annual commissions in excess of \$250,000.

See your Principal Broker for exact times and locations.



### "Motivation and

energy! That's what I get out of our weekly accountability group. Oh, and lots of laughs!"

—Jo-Ann Zebrowski  
Eugene



# STEP 12: INSPIRATION —MASTERMIND GROUPS



Watch the Integrity Insider on Facebook for the next Mastermind Group.



## Stay motivated and inspired with Mastermind Groups

Is it a class?

Is it an accountability group?

Is it a lecture?

**It's an opportunity to share ideas with like-minded brokers from your office and others!**

It's easy to get stuck in a rut when working your plan. Integrity's Mastermind Groups provide the opportunity to share ideas, concepts and tactics with other like-minded—and like production—Associates.



- **EXECUTIVE CLUB MASTERMIND GROUP** for Associates whose annual gross commission is less than \$100,000.

- **100% CLUB MASTERMIND GROUP** for Associates whose annual gross commission is \$100,000-\$249,999.

- **PLATINUM CLUB+ MASTERMIND GROUP** for Associates whose annual gross commission is over \$250,000.

# CONTACTS =

# INCOME

## It's That Simple!

On average, for every quality contact a person makes every day, they'll earn \$25,000 in commission.

- 1 Contact per Day = \$25,000 in Gross Annual Income
- 2 Contacts per Day = \$50,000 in Gross Annual Income
- 4 Contacts per Day = \$100,000 in Gross Annual Income
- 6 Contacts per Day = \$150,000 in Gross Annual Income
- 8 Contacts per Day = \$200,000 in Gross Annual Income

How much do you want to make?

## It's Your Call...

Literally.

It's no accident that RE/MAX Integrity Associates earn **about three times as much** as the average broker. Careful planning and **superior support** provide outstanding results!





# JUMPSTART CLASSES

**SETTING EXPECTATIONS**

**BUSINESS PLAN**

**IMPLEMENTING MARKETING TOOLS**

**OPEN HOUSES**

**WRITING OFFERS**

**WORKING WITH BUYERS**

**SALE AGREEMENTS**

**WORKING WITH SELLERS**

**TRANSACTION MANAGEMENT**

**LENDING 101**

**TITLE AND ESCROW 101**



where **Entrepreneurs** thrive

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