

6 Critical Must Do's to Succeed



Christy Buck Real Estate Team
832-264-8934



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REAL ESTATE SUCCESS *.rocks*

- Culture & Core Values
- Business Plan
- Organized Systems
- Hiring The Right Talent & Selling The Team Concept
- Accountability & Time Management
- Strong Marketing Strategies



Core Values

Christy Buck Team CORE Values

OPTIMISTIC

UNITY

TRUSTWORTHY

STABILITY

THANKFUL

ACTION

GENEROUS

DEVELOPMENT P&PD (PERSONAL & PROF.)

INTEGRITY

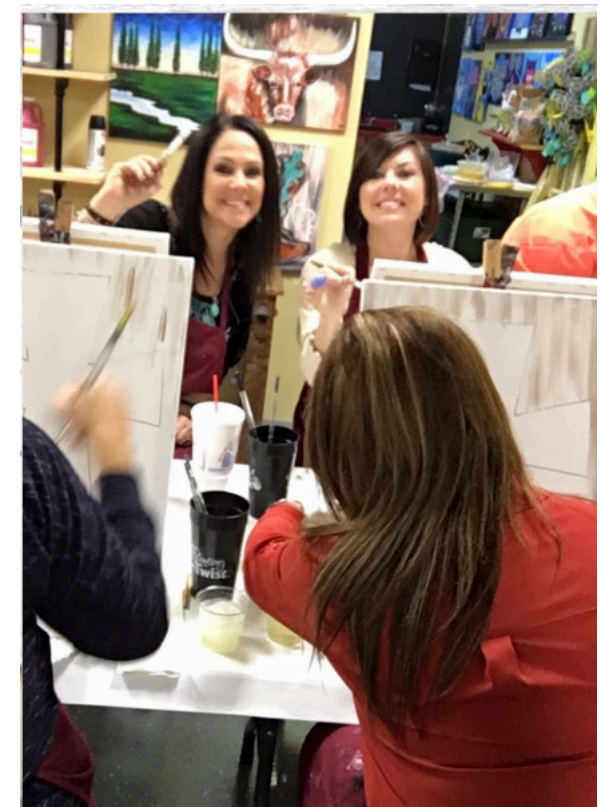
NOBLE

GROUNDED



Culture

- Monthly team outings. Ex: Bubble Ball Soccer, Weekend in Galveston, Paintball, Top Golf
- Thankful/Positive Jar
- Assigning books to read as a team monthly. Ex: The Five Dysfunctions of a Team
- Contests monthly and quarterly. Ex: Dice Game, call night gift
- Monthly, Quarterly and Annual Awards
- Discount on monthly desk fee for reaching their goals and accountability (61 Points on Daily Success Habits)
- Involvement in Community. Ex: Susan G Komen Walk
- Company Events. Ex : Egging Clients, Booing, Client Appreciation, Santa Picture



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Business Plan

with The Christy Buck Team

4 PILLARS OF SUCCESS

Pillar 1: Personal Database

Top 50

- Build list in Boom Town & Facebook
- Follow 86-50-1 Booklet and touch base on the 22nd of every month
- Set up a Pop By and Note Card plan to stay in touch, invite to all company events

Sphere/Relationship Clients

- Enter into Boom Town as sphere/archive with campaign. Once a month touch
- Set up on custom search in Boom Town and HAR to stay updated in their community
- Schedule personal visits with sphere monthly and pop by's. Time block on My Perfect Week

Past Clients

- Put in Top Producer with a Past Client Follow up plan
- Reach out on Anniversaries and birthdays- send a handwritten card or drop a gift off
- Invite to all client events and request referral business

Pillar 2: Internet Leads

Zillow

- Listing Videos on all of our listings
- Enter into Boom Town and prospect according to ABC Lead Plan. Set on drip campaign and custom search
- Stay in office on the days that I have the Zillow phone- work through Archives at that time

Boom Town

- Respond quickly to all leads and put on prospect plan according to ABC Lead Plan
- Pick up the phone and reach out personally to all
- Invite to all client events and send personal blogs

Facebook/Blogging

- Post blog post once a day of value. Share on personal page. Get consumers to engage
- Communicate with database on Facebook
- Post what I am doing in real estate often, so that I am not a secret agent

Goal: staying in touch

- Why? more referrals - more buyers
- Excuses for failure it being lazy - making time, it really isn't with it, other things are better
- Resolve work TOP 50 stayen schedule
- Action items Ideal weekly schedule and stick to it

Goal: hold more open houses

- Why? to get buyers
- Excuses for failure making the time
- Resolve - work showings around the set open houses
- Action items plan open houses earlier in the week, invite clients so I know I will have a good turnout.

Goal: Make 250,000 in within 3 mos

- Why? to help mae families, and create a great income for Family
- Excuses for failure mindset there is no way
- Resolve Always focus on money making task delegating other task
- Action items using showing agent and his personal assistant

Goal: Internet / Blogging

- Why? create a continual pressence
- Excuses for failure time and not knowing how to
- Resolve make it a daily morning task
- Action items sit w/ Samantha a team how to.

Goal: Family - Church Time

sumo clients need more time. I'll just take a little.



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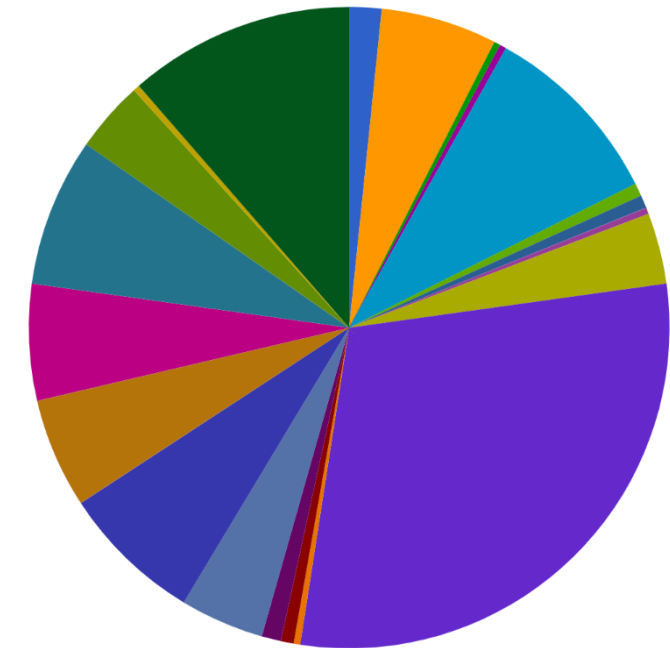
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Organized Systems

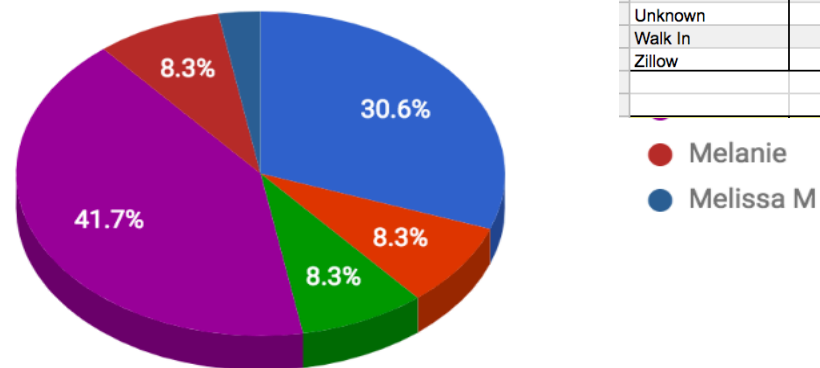
- Lead Tracking
- Lead Management Database- Boom Town
- Paperless File Storage- Google Drive
- CRM Database- Top Producer
- Operations Manual
- Agile
- Sales Tracking



Lead Source	Number of Leads
Agent Referral	5
Bill Board	0
BoomTown	18
Builder Client	1
Calendar	1
Call In	29
Car Wrap	0
Christy Buck.com	2
Community	0
Direct	2
Facebook	1
Geo Farm	0
Google	11
HAR	91
homelite.com	1
Homes.com	2
Internet	3
Landvoice	0
Loopnet	13
Open House	22
Past Client	17
Postcard	0
Pro Quest	18
ProspectingWorks	0
Ready Chat	0
Realtor.com	0
Referral	23
Relationship	11
Shopping Cart	1
Sign/Driveby	35
Social Media	1
Trulia	19
Unknown	5
Walk In	3
Zillow	250



Listing Lead Count





Name ↑

1. Listings Coming Soon

10. Withdrawn listings

2. Active Buyers

3. Active Listings ★

4. Active Buyer Agent Listings

5. Active Commercial Listing

6. Pending Clients

7. Pending Lease Files

8. Agent Referrals

9. Terminated 2017

Sample

My Drive > 1-2017 Active Paperless Files > 6. Pending Clients > Broeder Lis

Name ↑

Owner

1. Contract Brynn Cummings

2. Inspections_Amendments Brynn Cummings

3. Title Work Brynn Cummings

4. Listing Agreement Brynn Cummings

5. Buyer Walkthru_CDA_HUD Brynn Cummings

6. Emails Brynn Cummings

7. Offers Brynn Cummings

8. Photos Brynn Cummings

Document Checklist for Listings.pdf Brynn Cummings

Document Checklist for Pending Seller.pdf Susan Jenkins

Proquest Flyer.docx Victoria Solis

Paperless File Storage

Checklist for Seller's once Under Contract:

Documents that must be in paperless file through Google Drive ASAP:

- File Dividers made inside Google Drive as follows:
 1. Contract/Survey
 2. Inspections/Amendment
 3. Title Work
 4. Listing Agreement- If on listing side
 5. Buyer Walk/CDA/HUD/Payoff
 6. Emails & HOA Documents
- One to Four Family Contract (9 pages)
- HOA Addendum
- Information about Brokerage Services
- Third Party Financing Condition Addendum
- Seller Disclosure signed by all parties
- Environmental Addendum
- Stewart Title Tax Sheet initialed by buyer
- List of Upgrades signed off on
- Pre-Qualification Letter or Proof of Funds
- Copy of Earnest Money and Option Money Checks
- Buyer Disclosure Package that includes:
 - Broker Notice to Buyer Tenant
 - General Information and notice to a buyer
 - Information about Property Ins. For Buyer or Seller
 - Information about Special Flood Hazard Areas (TAR 1414)
 - Inspector Information
 - For Your Protection, Get a Home Inspection
 - Notice of Information from other Sources
 - Protecting your home from Mold

Possible Documents:

- Seller Temporary Residential Lease
- MUD Disclosure Form
- Intermediary Notice
- Non Realty Items Addendum
- Addendum for Sale of Property By Buyer
- Lead Based Paint
- Buyer Rep Form (when on Buyer's side)

Documents throughout Transaction:

- Title Commitment
- Inspection Report and all amendment s attached
- CDA – closer to closing
- Buyers Walk Through Form – after closing



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CRM

Home

Home

Calendar

Contacts

Listings & Closings

Marketing

Email

Applications

Share

FastTrack

Home

MY BUSINESS

0

28 0

0

0

125

20

0

0/138

0

Shows: Susan Jenkins For this week

!	DESCRIPTION	DATE	NAME	CONTACT METHOD	
!	Call client & co op agent regarding appraisal update	2017-08-05	Sander, Chase and Vigil, Justin	832-652-4840 (Mobile)	✓
!	If no repair requests- notify seller still	2017-08-05	Seifert, Ronald	419-439-0843 (Mobile)	✓
!	Request Title Commitment	2017-08-04	Langlinais, Chris and Patricia	225-241-6722 (Mobile)	✓
!	Add Inspection Report to Clients Google Drive Folder	2017-08-04	Seifert, Ronald	419-439-0843 (Mobile)	✓
!	Contact Client when Inspection Report/Repair Request comes in	2017-08-04	Ryder, Christian and Kimthi	281-799-2970 (Mobile)	✓

Go to Activities Add Activity

FOLLOW-UP COACH ?

★

NAME

★

CB Pending Intermediary TORI

★

After Closing Plan

★

CB Pending Intermediary- SUSAN

★

Closings services checklist

★

NHC Complete Build

★

NHC Spec Home

★

Pending Buyer Checklist

★

Pending Seller Checklist

★

Pending Seller Checklist - COMMERCIAL

Create Plan

Auto Apply Rules For Leads










Closing Plan for Pending Buyer Checklist

Activity	Description	Day	From	Reminder	Drop off	Assigned to
To-do	Put close date on calendar	0	After acceptan...	0		Applied Person
To-do	Put Contingency Date on Calendar if a...	0	After acceptan...	0		Applied Person
To-do	Create Client Folder in Google Drive u...	0	After acceptan...	0		Applied Person
To-do	Put third party financing days on calen...	0	After acceptan...	0		Applied Person
To-do	Executed Contract to the Lender	0	After acceptan...	0		Applied Person
To-do	Send client Intro Email/Copy of Contract	0	After acceptan...	0		Applied Person
To-do	Request Client to Follow us on FB	0	After acceptan...	0		Applied Person
To-do	Put HOA Delivery Date on Calendar if ...	0	After acceptan...	0		Applied Person
To-do	Verify that all contract documents are i...	0	After acceptan...	0		Applied Person
To-do	Put Third Party Financing Days on Cal...	0	After acceptan...	0		Applied Person
To-do	Put Option Period on Calendar	0	After acceptan...	0		Applied Person
To-do	Deliver Option Money and request rece...	1	After acceptan...	0		Applied Person
To-do	Deliver Earnest Money to title and get r...	1	After acceptan...	0		Applied Person
To-do	Mark Lease Back Dates on Calendar if ...	1	After acceptan...	0		Applied Person
To-do	Receipted Option Money in File	2	After acceptan...	0		Applied Person
To-do	Verify Inspection Time with Listing Age...	2	After acceptan...	0		Applied Person
To-do	Put Inspection time on Calendar	2	After acceptan...	0		Applied Person
To-do	Contact Client when inspection report c...	5	After acceptan...	0		Applied Person
To-do	Save Title Commitment to Folder	10	After acceptan...	0		Applied Person
To-do	Send signed repair amendment to title ...	10	After acceptan...	0		Applied Person
To-do	Add Inspection Report to Client's Goog...	10	After acceptan...	0		Applied Person
To-do	Follow up with Title Commitment	10	After acceptan...	0		Applied Person
To-do	Have Lender order appraisal	11	After acceptan...	0		Applied Person
To-do	Follow Up/Email Client	13	After acceptan...	0		Applied Person
To-do	Follow up/Email Lender	13	After acceptan...	0		Applied Person
To-do	Order Closing Gift	14	After acceptan...	0		Applied Person
To-do	Follow Up/Email Client	15	After acceptan...	0		Applied Person
To-do	Follow up/Email Lender	16	After acceptan...	0		Applied Person
To-do	Follow up on Appraisal	16	After acceptan...	0		Applied Person
To-do	Follow up/Email Client	18	After acceptan...	0		Applied Person
To-do	Complete CDA, and send full file to Ra...	20	After acceptan...	0		Applied Person
To-do	Follow Up/Email Lender	20	After acceptan...	0		Applied Person
To-do	Follow up with Co Op Agent to see if re...	20	After acceptan...	0		Applied Person
To-do	Send CDA to title company	20	After acceptan...	0		Applied Person
To-do	Remind Client and Co Op agent to set ...	21	After acceptan...	0		Applied Person
To-do	Follow Up/Email Client	21	After acceptan...	0		Applied Person
To-do	Follow Up/Email Lender	23	After acceptan...	0		Applied Person
To-do	Follow up/Email Client	24	After acceptan...	0		Applied Person
To-do	Set up Buyer's walk Through with Buye...	25	After acceptan...	0		Applied Person
To-do	Coordinate Possession/Keys with Co O...	25	After acceptan...	0		Applied Person
To-do	Set up Closing	25	After acceptan...	0		Applied Person
To-do	Provide Buyer Closing Details	25	After acceptan...	0		Applied Person
To-do	Print Closing Docs for agent	26	After acceptan...	0		Applied Person





































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Name ↑	Owner
 1. CORE Values & 10 Scrolls	me
 2. Job Descriptions & Contracts	
 3. Team Handbook and Expectations	
 4. Trademark and Assumed Name	
 5. Management	
 6. Time Management	
 7. Hiring Process	
 8. Agent Termination Documents	
 9. New Building 2017	

Operations Manual

Name ↑	Owner
 1. General	me
 10. Marketing	me
 2. Lead Systems	me
 3. Listings	
 4. Pending	
 5. Training Binders for Positions	
 6. ISA	
 7. Team	
 8. Geo Farming	
 9. Time Management	

Name ↑	Owner
 Changing A Listings Status in HAR.pdf 	me
 Documents that must be loaded in HAR.docx 	me
 How to Add HAR Weekly Report.mp4 	me
 How to Enter a Listing into HAR.mp4 	Brynn Cummings
 How to Enter a Listing into HAR.mp4 	Brynn Cummings
 How to Enter an Open House into HAR.mp4 	me
 How to Enter Documents into HAR Listing.mp4 	me
 How to Put Listing Incomplete in HAR.mp4 	me
 How to Send Incomplete Listing in HAR to Agents.mp4 	me
 Offer Instructions.docx 	me
 Offer Instructions.pdf 	me
 Private Agent Remarks in HAR.com.docx 	me



Agile

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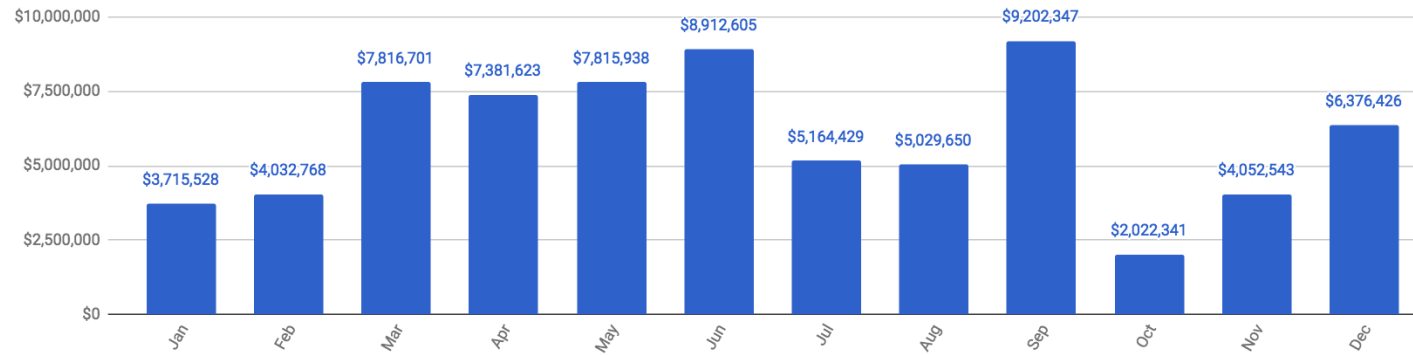


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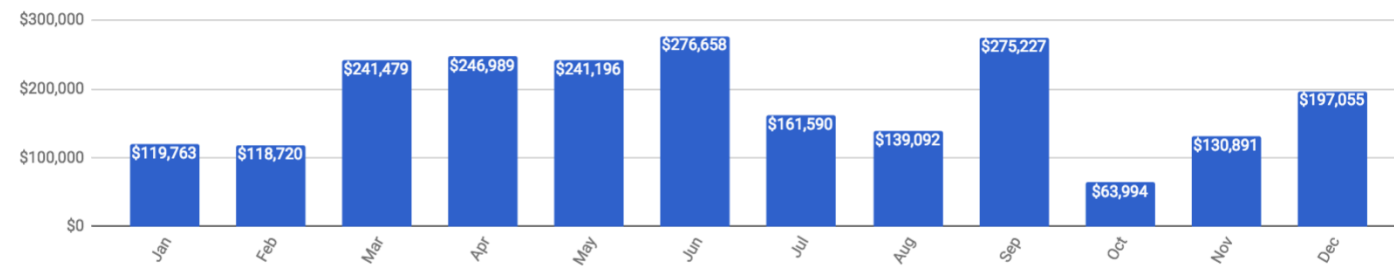
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Sales, Commissions & Other Fee Related Charts

Team Total - Total Sales by Month

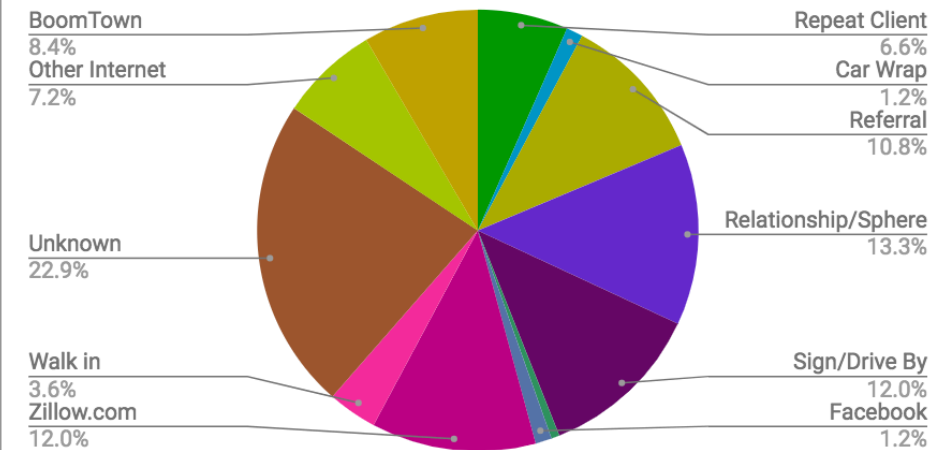


Team Total - Gross Commissions by Month



Sales Tracking

Team Totals (Counts) by Lead Source



Michele Woods

Closed Transactions

Year	Buyer	Seller	Total	Goal	Sales Price	Commission	BSF	E&O	Amount Paid to Agent	Listing Partner Amount	ISA Fee	Processor Bonus	Processor Bonus (Listing)	Team Net Commission
2017	26	7	33	60	\$6,747,289	\$210,251		\$1,388	\$89,493		\$1,153	\$375	\$80	\$120,471

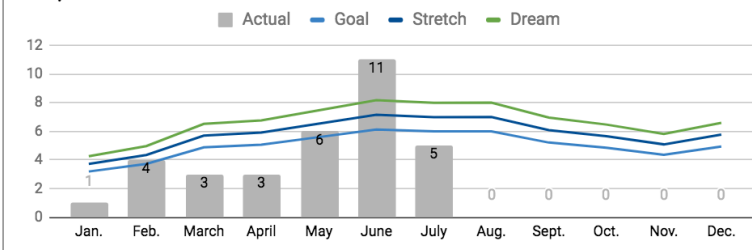
2017 Goals

Your sales goal for 2017?	60
Stretch goal for 2017?	70
Dream goal for 2017?	80

2017	Actual	Goal	Stretch	Dream
Jan.	1	3	4	4
Feb.	4	4	4	5
March	3	5	6	7
April	3	5	6	7
May	6	6	7	7
June	11	6	7	8
July	5	6	7	8
Aug.	0	6	7	8
Sept.	0	5	6	7
Oct.	0	5	6	6
Nov.	0	4	5	6
Dec.	0	5	6	7
Total / Year	33	60	70	80

No data

Goal, Stretch and Dream



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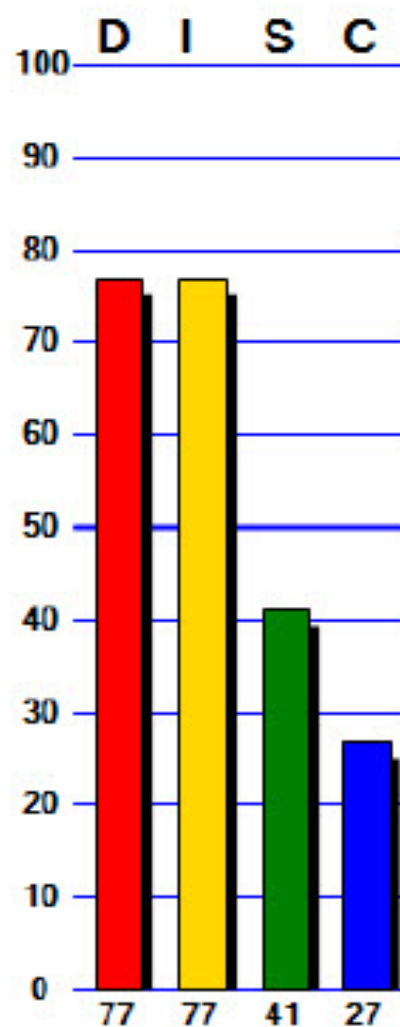
Hiring The Right Talent & Selling The Team

- Hiring Process
- Delegation
- Compensation
- Script For Selling The Team



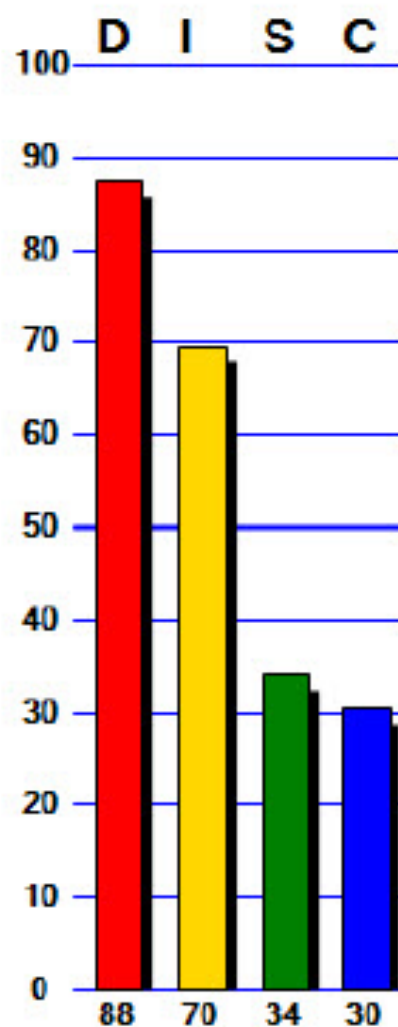
Christy

Adapted Style - Graph I



Pattern: ID (5532)
Focus: Leadership

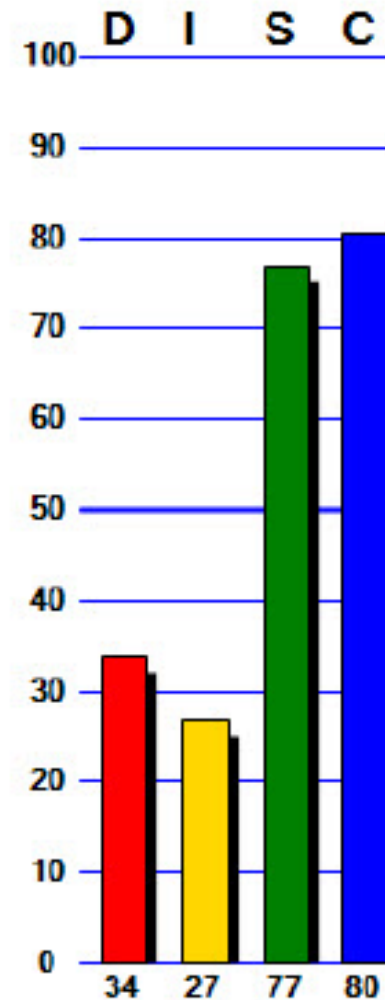
Natural Style - Graph II



Pattern: DI (6522)

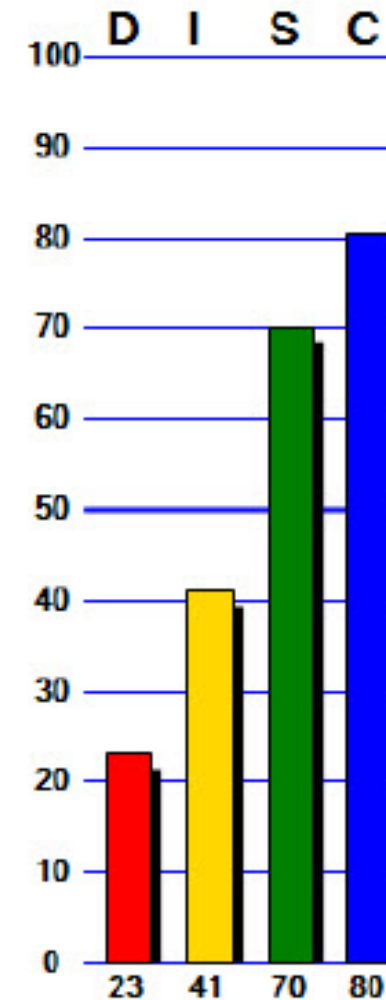
Samantha

Adapted Style - Graph I



Pattern: CS (2256)
Focus: Work

Natural Style - Graph II



Pattern: CS (2356)





"Creating endless opportunities."

ChristyBuckTeam.com



MEET OUR TEAM

OFFICE MANAGER



SAMANTHA KNOERR
832.549.3387
Samantha@
ChristyBuckTeam.com

Samantha has been with the Team for 10 years and is a licensed Realtor. Given her background, she provides support and expertise to the Christy Buck Team to ensure quality, first class service to its clients.

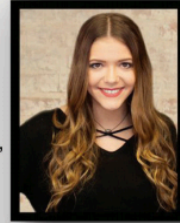
CLOSING COORDINATOR



SUSAN JENKINS
832.429.6778
Susan@
ChristyBuckTeam.com

Under Contract? Susan is a licensed Realtor and will handle all the details of your transaction from contract to close. As the team closing coordinator, she will keep you informed of details throughout the process of your transaction.

LISTING COORDINATOR



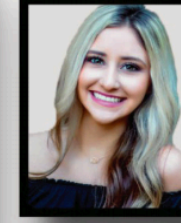
BRYNN CUMMINGS
832.930.0129
Brynn@
ChristyBuckTeam.com

Brynn is a licensed Realtor and works closely with Christy Buck, supporting all Team property listings. She will provide communications with the sellers throughout and will negotiate offers and repair issues.

OUR SUPPORT TEAM



VICTORIA SOLIS
832.481.3166
Victoria@
ChristyBuckTeam.com

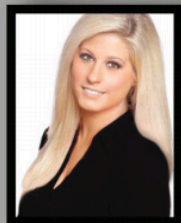


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LISTING AGENT



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OUR BUYER'S AGENTS



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Accountability & Time Management

- My Perfect Week
- Daily Success Habits
- Daily Huddles
- Weekly Office Meeting
- Weekly Accountability Meetings
- Quarterly Review



CLIENT CARE COORDINATOR “MY PERFECT WEEK”

[illegible]

Daily Success Habits

Name _____

Date _____

Activity Tracker

61 POINTS OF RHYTHM			Date
8			
8:30			
9	CALLS	25	B's Into Drip
9:30	EMAILS	25	C's Into Drip
10	NOTES	5	Showings
10:30	2 HOMES 1 CLIENT	10	Listing Apts
11	OFFER WRITTEN	10	Buyer Apts
11:30	LISTING APT	10	Open House Attendees
12	AGENCY AGREEMENT	10	Emails Sent
12:30	CLOSING	10	Leads
1	1 NEW THING	1	
1:30	TOTAL	61	
2	Notes:		
2:30			
3			
3:30			
4			
4:30			
5			
5:30			
6	To Do List		
6:30			
7			
7:30			
8			
8:30			

Start: End: Total Min. Called:

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100	101	102	103	104	105	106	107	108	109	110	111	112	113	114	115	116	117	118	119	120	121	122	123	124	125	126	127	128	129	130	131	132	133	134	135	136	137	138	139	140	141	142	143	144	145	146	147	148	149	150	151	152	153	154	155	156	157	158	159	160	161	162	163	164	165	166	167	168	169	170	171	172	173	174	175	176	177	178	179	180	181	182	183	184	185	186	187	188	189	190	191	192	193	194	195	196	197	198	199	200	201	202	203	204	205	206	207	208	209	210	211	212	213	214	215	216	217	218	219	220	221	222	223	224	225	226	227	228	229	230	231	232	233	234	235	236	237	238	239	240	241	242	243	244	245	246	247	248	249	250	251	252	253	254	255	256	257	258	259	260	261	262	263	264	265	266	267	268	269	270	271	272	273	274	275	276	277	278	279	280	281	282	283	284	285	286	287	288	289	290	291	292	293	294	295	296	297	298	299	300	301	302	303	304	305	306	307	308	309	310	311	312	313	314	315	316	317	318	319	320	321	322	323	324	325	326	327	328	329	330	331	332	333	334	335	336	337	338	339	340	341	342	343	344	345	346	347	348	349	350	351	352	353	354	355	356	357	358	359	360	361	362	363	364	365	366	367	368	369	370	371	372	373	374	375	376	377	378	379	380	381	382	383	384	385	386	387	388	389	390	391	392	393	394	395	396	397	398	399	400	401	402	403	404	405	406	407	408	409	410	411	412	413	414	415	416	417	418	419	420	421	422	423	424	425	426	427	428	429	430	431	432	433	434	435	436	437	438	439	440	441	442	443	444	445	446	447	448	449	450	451	452	453	454	455	456	457	458	459	460	461	462	463	464	465	466	467	468	469	470	471	472	473	474	475	476	477	478	479	480	481	482	483	484	485	486	487	488	489	490	491	492	493	494	495	496	497	498	499	500	501	502	503	504	505	506	507	508	509	510	511	512	513	514	515	516	517	518	519	520	521	522	523	524
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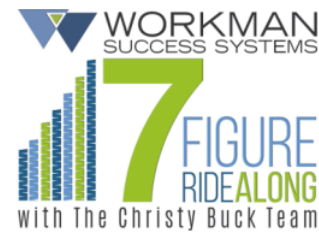
Workman Success Systems



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Daily Huddle Outline:



CHRISTY BUCK TEAM HUDDLE

GOAL: GET ALL TEAM MEMBERS UP AND TO THE OFFICE IN THE MORNING, PUMPED FOR THE DAY. THIS TIME ALLOWS ALL TEAM MEMBERS TO GET ON THE SAME PAGE ABOUT WHAT IS GOING ON WITHIN THE TEAM.

TIP: GROUP HUDDLES SHOULD BE NO MORE THAN 15 MINUTES EACH MORNING.

OUTLINE:

- CORE VALUES & 1 SCROLL
- READ NOTES FROM THANKFUL/POSITIVE JAR
- LISTING TEAM: HOW MANY LISTING APPOINTMENTS YESTERDAY?
UPCOMING LISTINGS THE TEAM NEEDS TO KNOW ABOUT?
DO ANY HOMES NEED AN OPEN HOUSE SOON?
- PENDING DEPARTMENT: DOES THE CLOSING COORDINATOR NEED ANYTHING FROM ANY AGENTS ON THE FILES? HOW MANY PENDING FILES ARE CURRENTLY WITH THE TEAM?
- PROJECTS: WHAT COMPANY PROJECTS ARE GOING CURRENTLY, WHICH TEAM MEMBERS ARE NEEDED AT THIS TIME TO ADVANCE THE PROJECT.
- SCRIPTING
- WRAP UP— REMIND TEAM OF ADDITIONAL ACTIVITIES FOR THE WEEK

Quarterly Review Outline:

Q1:

Discussion: 113 Leads total in BT assigned. 13 qualify, 8 hot, 31 nurture, 60 watch leads. All caught up. Still working on a few nurture clients, and this week is watch lead week. Doing well on follow up with sphere. Reviewing goals from the year: Doing really well on balancing family and time. Reached 6 month goal in re adjusting zillow.

Follow Up Items: Discussing an assistant option right now, pay ideas, Michele wants someone full time to work with her. Stay on this topic. Samantha suggests getting this person to be able to reach goal of 60 this year.

Areas for Improvement: Being a little more personal, staying on task, more phone calls- getting back to basics. Tweaking 4 Pillars this week to break them out a little more and group some together in the Sphere/Database pillar. Main focus on second quarter is to work on the follow up on prospects more after Day 2. Lack of inventory is hurting, going to help get inventory.

Goal for next quarter: 17 (down 4 additional for goal). 3 under contract currently. Plan to reach that goal: Prospect more, and work on better follow up after Day 2-3 on qualify leads. Helping with geo farm plan.

Activity: Write down all tasks that an assistant can do for you to free your time. Goal would be to get someone that can get licensed and grow with her.

Pull My Perfect Week back out and DO the activities on there. Get back on track- relaxed lately but identifies that area needing improvement. **BALANCE!**



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Strong Marketing Strategies

- Marketing Material such as Koozies in local restaurants/venues
- 7 wrapped company vehicles
- Just Listed/Just Sold Cards
- Billboards
- VIP Open Houses
- Geographic Farming
- Pop Bys
- Referral Gifts
- Client Egging/Client Booing
- Client Appreciation Events- Thanksgiving Pie Giveaway, Pictures with Santa
- Social Media Marketing Plan



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Downloads: WorkmanSuccess.com/RESR



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