

# Chapter 1: Building Success - Mastering the Art of Convers8 in Real Estate

Convers8 is a life's work. Not just my life mind you; but, the lives of everyone I've come in contact with over the years and all my experiences. It has been forged through a great number of failures and cast into a clear path from success. We are here to introduce a proven system that will build lasting connections with every contact you make and monetize them.

Sounds too good to be true? It's not and the success of every agent who's worked with me at MTX Realty can attest to it. Let me help you understand how.

Real estate sales is an extremely exciting career path. This industry holds absolutely no ceilings for the industrious and creative minds that choose it. It can, however, hold a treacherous path for those who don't treat it for what it really is.

As a real estate agent, Realtor, you are a small business owner. The business brand is you and all that entails. As branded business owners we have two jobs and only two

jobs that must be our main focus daily. Producing leads & solving problems for them, right? Super simple! Sales cures all! Everything else can be delegated in time but these two core jobs will forever be our responsibility or the business will die.

What we bring to the market is extremely important and sates a core need for every person in every community around the world. How seriously this point is taken holds a direct impact on the success of your business. I'll explain how to do this a little later but for now let's set the scene so it will be simple to understand.

Think about your business, real estate, as a child. Now you have carried this baby in your mind and heart while completing the coursework, fingerprinting, exams, classes then finally the big test. You walked up to the counter to receive the results and BOOM! You've passed!! Now after a short wait, the license number comes in and your business is born in its infancy.

Now what?

I'm going to point out a figure that you should already know. 87%. This is the percentage of new Realtors that fail within the first two years of getting their license. With this kind of attrition rate our attention should be focused on the other number, 13%. How do these agents make it? What is the secret that opens the door to success in the real estate industry? How do I make sure I'm at the top of that 13%?

It's a simple formula that I'd like you to write down and put somewhere so that it will be in front of you every day.

Activity + Consistency = Success

Now, every new agent I've ever worked with comes in super excited full of hope and expectations of greatness. We discuss the requirements, their expectations, my expectations then agree and commit to each other that we will uphold our parts in the journey. We set a one week check up for accountability and what happens next is like clockwork.

Creating lead flow in real estate is easy if you're actively working at it. We have seen a multitude of agents work through hundreds of leads and get nothing at all from it. On the other hand, the agents who lean whole heartedly into what Convers8 show a 30% or better conversion rate on the same leads even in the very beginning. The difference, setting themselves up for success with the knowledge of not only how to communicate with these leads but also what to expect throughout the entire transaction.

36% of the agents I begin working with fall short just one week in. 64% hit their mark and find that by doing so and following through with the simple tasks they already have new business coming in. This is shared back with those that missed and on average another 21% jump on board giving us an 85% success rate by the end of week two.

This paints a clear picture of what to expect short term with the agent's business success rate. The 15% that fall short in these first two weeks have the same excuses. Showing a character flaw that will rule their lives until forced to make significant change. But more likely than not, this won't happen before they drop out of real estate all together. So they join the 87% on the national average.

Now, the 64% that smash their first week's goals... These agents move on to hit our leader boards in the next six months. Graduate from independent agent to team lead. Grow out a significant residual income and open offices of their own. With a straightforward path to success and the self control to maintain consistent progress through simple daily tasks the formula to success is executed.

Now that you have a clear understanding of what it really takes to achieve success with your business, how are you measuring up? A question most are asking is what the hell are the daily tasks? The big one that's missed is what the initial goals were that got the new agents on the success track immediately.

You see, these are the cornerstones of any business. Remember those two items we decided are the most important and should be our main focus daily? Lead generation and problem solving for them right? It makes sense with this knowledge that designing our branded marketing to attract leads and learning 'how to' problem solve correctly should be step one.

So, setting the digital front up correctly in two days is key. Launching the marketing sets creating immediate lead flow is locked in. Learning how to have a pointed conversation that not only builds deep connections but sets expectations for all parties with a simple and achievable goal as our agreed upon mark solves the problems. Breaking down this strategy throughout the entire process for buyers, sellers and tenants brings it home and establishes a confidence that's second to none.

We've built a secure system for marketing that every MTX Realty agent can plug into and launch in three days. What we want to share with you is how we speak to these leads. How we connect in such a deep way. How we are able to help them identify, visualize and articulate their dreams. The way we guide them through their most viable options to

choose the best fit making that dream a goal. How we establish action steps and tasks creating a plan to bring the goal into reality. Setting clear expectations for ourselves and the clients so no misunderstandings come to bare. Locking in the timelines required to bring us all together at the finish line to celebrate a successful journey.

It's the business batting cage! Where instead of balls being pitched at you it's the lead flow that we simply exercise this crazy new skill set to connect with each one. This methodology, aptly named 'Convers8,' not only enhances client conversion rates but also solidifies your success in the challenging real estate industry.

The magic? A byproduct of your sincere desire to better the lives of everyone you interact with. Making each of their dreams come true and earning an amazing living for it. We have devised an unassailable method for agents to consistently transform leads into clients. Through decades of practical real estate experience furnishing us with unique insights into the realities and subtleties of the industry. The typical real estate market is marred by uncertainty and stiff competition, a reality that you will quickly realize. To counter this, we sought to develop an innovative and comprehensive strategy that would both address these issues and deliver exceptional client service.

The Convers8 method involves a carefully designed sequence of interactions to engage and convert potential buyers and sellers. It commences with an intimate discovery phase, where agents ask open-ended, personal questions to truly understand their client's lifestyle, needs, and preferences. Rather than just posing transactional inquiries, agents genuinely invest time and effort to connect with clients on a deeper level.

Once agents gather ample information, they shift into the logic phase, reflecting on the details obtained during the discovery stage. This step reinforces trust, as it demonstrates the agent's active listening and attentiveness to the client's needs.

The subsequent stages, including 'Data,' 'Options,' and 'Driving,' are targeted towards presenting a tailored solution that not only aligns with the client's envisioned lifestyle but also stimulates an emotional connection with the property. This process crafts a compelling narrative that transports clients into their future homes, fostering a strong desire to make it a reality.

The final stages, 'Next Steps,' 'Set the Appointment,' and 'Confirm Expectations,' serve to lock in the commitment from clients. At these stages, agents lay out clear steps for both parties, paving the way for the client's active participation in the process. By

involving the clients in task creation and confirmation, agents foster a sense of ownership and engagement, thereby securing the client's commitment.

Convers8 is a significant departure from traditional sales techniques, which primarily focus on the property's features or financial aspects. Instead, it integrates interpersonal connection, storytelling, and client participation, thereby creating an immersive and engaging client experience.

The significance of our Convers8 methodology lies in its human-centric approach. The real estate industry is often perceived as purely transactional, with little room for human connection. However, Convers8 proves the contrary by showing that building genuine relationships with clients and understanding their individual needs can drive successful real estate transactions. The method recognizes that buying or selling property is a significant life event for people and, as such, treats the process with the personal touch it deserves.

In the current real estate landscape, where competition is fierce and client expectations are continually evolving, the Convers8 methodology provides a reliable blueprint for success. It allows agents to stand out, not merely as salespeople, but as trusted advisors who can guide clients through the complex real estate journey with empathy, knowledge, and commitment. The Convers8 method is indeed a testament to the importance of intertwining effective sales techniques with the art of human connection in real estate.

Now, let's jump right in so you can see what all the fuss is about!

# Chapter 2:

# Discovery

**Learn, Learn, Learn**

## **Objective:**

The objective of Discovery is to hyper connect and bring down the initial barrier of communication.

## **Goal:**

The goal in discovery is getting to know the potential client while making a connection and logging what we learn about them in the process. They are going to paint the picture for us of exactly what they want and don't want in a new home. Our job is to get it all down!

## **2.1 Understanding the Discovery Process**

In the initial stage of the sales process, it is important to build a deep understanding of the potential client. You need to delve into their personal information, learn about their daily routines and understand what their desires are from their new home. This information won't always be directly related to real estate but is critical in establishing a genuine connection with the potential client.

To make the potential client comfortable, it is important to explain the nature of the questions we are going to ask. You might say something like:

"I can ask you the same questions 99% of the agents out there will and end up going down the wrong path. That is absolutely not my goal. I'd like to learn about you, a day in the life in your shoes, which is where I will get the information we absolutely need for me to provide the best service to you and your family. These are personal questions, so I'm asking permission first. Would you be open to having a conversation like this?"

By using this opening statement, we set the expectations of what it will be like working with us in their minds and prepare them for an open and meaningful conversation.

The Discovery phase is the initial and arguably the most crucial stage in the sales process. During this phase, your aim is not to sell anything but to gather as much information as possible about the potential client. By showing genuine interest in your client's life and needs, you create an atmosphere of trust and understanding, which is paramount for any successful business relationship.

The core principle of Discovery is "Learn, Learn, Learn". This phase is all about asking the right questions and actively listening to the client's answers. The more you know about the client, the better you can serve them in the later stages of the sales process.

## 2.2 The Importance of Learning

Understanding your client's lifestyle, needs, and preferences is key to finding them the perfect home. This involves asking questions about their daily routines, family situation, hobbies, work, and even their social life. Every piece of information can help you build a clearer picture of the client's ideal home.

During the Discovery phase, remember to be patient and give your client enough time to answer your questions. Be empathetic and show genuine interest in their answers. This will make your client feel heard and valued, fostering a strong and trusting relationship.

## 2.3 Key Questions to Ask During Discovery

In the Discovery phase, the quality of your questions is just as important as the quantity. You want to ask open-ended questions that stimulate conversation and give your client the opportunity to share detailed information about their life and needs.

Avoid asking yes or no questions, as they often end conversations rather than encouraging them. Instead, use questions that start with "what", "how", "where", "who", and "why". For example, instead of asking "Do you like to cook?", you could ask "What is your favorite thing to cook and why?"

The following are some question topics you can ask to start the conversation and keep it flowing:

- Could you take me through a typical day in your life? Let's start with your morning routine...
- Do you have children? If so, what are their names and ages?
- Do you own any pets?
- What are your hobbies? What do you enjoy doing in your free time?
- What does your workday look like?
- Where do you go to church?
- Tell me about your friends.
- What kind of car do you drive?
- Are you part of any clubs or organizations?

- What area of the home does your family spend the most time in?

Your aim should be to create a comprehensive profile of the potential client, which will guide the rest of the sales process.

## 2.4 Handling Unresponsive Leads

If the potential client is not responding or giving one-word answers, it might be necessary to pause the conversation and request their consent to proceed with personal questions. If they're not willing to engage in such a conversation, it might be an indication that you're not a good fit to work together.

By the end of this chapter, you should have a detailed understanding of the potential client's lifestyle, their needs, and their expectations from their new home. This knowledge will inform the next stages of the sales process and help you provide a tailored and personalized service.

## 2.5 Documenting the Information

As you gather information, it's important to document it carefully. This can be in the form of notes, voice memos, or any other method that works for you. Make sure to organize the information in a way that makes it easy to refer back to in the future.

## 2.6 Summary

The Discovery phase is the foundation upon which the entire sales process is built. By dedicating time and effort to learn about your client, you not only create a trusting relationship but also equip yourself with the knowledge needed to find the perfect home for your client. So remember, in the Discovery phase, it's all about "Learn, Learn, Learn".

# Chapter 3: Logic

**Repeat, Confirm**



## **Objective:**

To confirm and validate the information gathered during the Discovery phase and establish a shared understanding of the client's needs and expectations.

## **Goal:**

To reach a mutual agreement with the client about their needs and expectations, ensuring they feel heard, understood, and confident in the salesperson's capacity to meet their specific requirements.

### **3.1 Understanding the Logic Phase**

Following the Discovery phase, we move into the Logic phase, another crucial part of the sales process. Here, we validate and confirm the information gathered during Discovery, ensuring our understanding aligns with the client's expectations. The essence of the Logic phase can be encapsulated by two words: "Repeat" and "Confirm".

### **3.2 Repeating - A Reflection of Understanding**

Repetition serves as a tool to showcase your understanding of the client's needs. It demonstrates to the client that you've been attentively listening and processing the information they've shared. Repeating also gives you a chance to clarify any ambiguities and avoid any potential misunderstandings.

For example, you could say something like, "Let me ensure I understood correctly. You're looking for a four-bedroom house within walking distance of schools and parks, with a spacious kitchen as you love to cook. Have I captured your needs accurately?"

### **3.3 Confirming - Affirming Client's Requirements**

Confirmation is the second essential part of the Logic phase. Once you have repeated the client's needs and expectations, it's crucial to ask for their confirmation. This is the moment when your client has the opportunity to correct any misunderstood information, add further details, or validate that you've accurately understood their preferences.

It's crucial to ask the client directly if the recapitulated information is correct. For example, you could say, "Is that correct?" or "Have I missed anything?" This not only confirms that you're on the same page but also reinforces the client's trust in you.

### 3.4 Emphasizing the Importance of Feedback

Within the Logic phase, feedback from the client is vital. Their feedback helps rectify any misconceptions and fine-tune your understanding of their needs. Encourage the client to speak openly, reassuring them that their input is highly valued and crucial for the success of the process.

### 3.5 Summary

The Logic phase, characterized by "Repeat" and "Confirm", builds upon the foundation laid during the Discovery phase. It ensures that the gathered information aligns with the client's expectations and prepares the groundwork for the subsequent stages of the sales process. This phase emphasizes the importance of clear communication, validation of understanding, and openness to feedback.

# Chapter 4: Data

## Build, Feeling

### Objective:

To help the client clearly envision their dream home and foster a deep emotional connection to it, guiding them to articulate their preferences and feelings related to their prospective new home.

### Goal:

By the end of this phase, the client should be able to express, in specific terms, the details of their desired home and the feelings they associate with owning that home. This emotional bond will serve as a powerful driving force in the subsequent steps of the home-buying process, shaping their decisions and making them more committed to the pursuit of their dream home.

## **4.1 Purpose of Data - Build, Feeling Phase**

The 'Data - Build, Feeling' phase emphasizes the importance of the client's unique vision and how it relates to their life goals and emotional well-being. Here, you will encourage the client to build their dream home in their mind using the personal details they shared in the Discovery phase. By bringing their emotions into the picture, you help them make the shift from merely wanting a new home to desiring the perfect home that is shaped by their dreams and life aspirations.

## **4.2 Conducting the Data - Build, Feeling Phase**

Begin this phase by prompting your client to express what they exactly want in their new home. Use their words and phrases gathered during the Discovery phase to guide this conversation. Encourage them to visualize every detail, from the layout of the kitchen to the view from their master bedroom window. This exercise helps paint a vivid picture of their dream home, allowing them to articulate their preferences more confidently and accurately.

Next, you want them to articulate the feeling they would experience when they finally step into their new home. Whether it's the sense of accomplishment, the pride of owning a beautiful home, or the excitement of starting a new chapter in their life, getting them to verbalize this feeling is crucial. This emotional connection plays a pivotal role in propelling them forward in the home buying process.

Remember, the goal of this stage is not to sell a house but to build an emotional connection between the client and their future home. This emotional bond will significantly influence their decisions moving forward and can make your job as a salesperson much more straightforward.

## **4.3 Key Takeaways**

In the 'Data - Build, Feeling' phase, your role is to be a facilitator who helps the client articulate their dream home's specifics and emotional significance. By drawing out these details and feelings, you can better understand what the client truly wants, enabling you to provide a more personalized and impactful service.

It's important to note that this process might take time and require patience. Not all clients will open up immediately or know exactly what they want. Your job is to gently

guide them through this process, encouraging them to explore their dreams and feelings without feeling rushed or pressured.

By the end of this phase, you will have built a deep emotional connection between the client and their potential home, providing a strong foundation for the next steps in the sales process.

# Chapter 5: Options

## Menu Sell, Decision

**Objective:** We present the options as action steps to make their goal of buying a new home a reality.

**Goal:** The goal of these options is to get them to a literal step forward and make a choice to proceed with us.

## 5.1 Importance of Options

When dealing with real estate transactions, it's crucial to recognize that different clients have different needs based on whether they're buying or selling property. Consequently, the options you present and the guidance you provide should align with these distinct roles.

## 5.2 Options for Buyers

The buyers might be interested in several types of properties based on their needs, financial capabilities, and lifestyle preferences. A few options could include:

- **Brand New Construction / Spec:** For buyers who want customization and don't mind waiting, new construction offers them the freedom to select their preferred designs and layouts.

- **Established Home in an Established Neighborhood:** For those looking for a ready-to-move-in solution with a warm community feel, a home in an established neighborhood could be the perfect fit.
- **Condominiums:** If the buyer seeks a low-maintenance lifestyle, perhaps a condo with amenities such as a gym, pool, and security might appeal to them.

## 5.3 Options for Sellers

Sellers, on the other hand, might be contemplating various ways to market and sell their property. Some choices could be:

- **Traditional Sale:** This involves listing the property on the open market and waiting for a buyer to make an offer. The seller has control over the price and negotiation process.
- **Quick Sale to Real Estate Investors:** If the seller is looking for a quick transaction, they might consider selling to a real estate investor who can offer cash and a swift closing process.
- **Lease Option or Rent to Own:** If the market conditions are not favorable, the seller might consider a lease option, offering potential buyers a chance to rent the property with an option to purchase at a later date.

## 5.4 Making the Decision

Once you've presented the options, your next job is to ask them which option best aligns with their goals. Then, silence. It's critical at this juncture to let them think. The silence might be uncomfortable, but remember, the first to speak generally loses. The silence allows the clients to internalize the information and weigh the options.

This strategic pause is not just a sales tactic; it's a sign of respect for the client's thought process. It gives them space to voice their concerns, ask questions, and eventually come to a decision that best suits their needs and goals. Your patience and understanding at this stage can significantly enhance their confidence in you as a trusted advisor.

## 5.5 Summary

Presenting clients with a menu of options is about empowering them to make informed decisions that align with their goals. The key to a successful Menu Sell is to present

clear, comprehensible options tailored to the client's situation, whether they are a buyer or a seller.

However, presenting the options is only half the battle. What truly counts is giving them the space to think and make their decision. This shows respect for their autonomy and reassures them that you're there to facilitate their journey, not dictate it. By doing this, you cement your role as a trusted advisor, making them more likely to turn to you in the future and recommend you to others.

# Chapter 6: Driving

## Options, Direction

**Objective:** We want to build expectations of what it will be like working with us throughout the process.

**Goal:** To ensure they understand they are in the driver's seat every step of the way. They will be 100% in the know and presented with options each step of the way. Their choices will be highly educated ones so they may proceed with confidence through us.

### 6.1 They Are In The Driver's Seat

In the "Driving" stage of a real estate transaction, your role is not only to present the options available but also to guide your client towards a decision that aligns with their goals. This is an opportunity to demonstrate your expertise and commitment to their needs, ensuring they feel confident and comfortable throughout the process.

### 6.2 Exploring Options

This is the stage where you'll take a deeper dive into the options you've presented to your clients, discussing the potential benefits, drawbacks, and implications of each choice. For buyers, this might mean exploring different property types, discussing financial implications, or considering lifestyle changes. For sellers, this might involve a thorough discussion about the market dynamics, home-staging tips, and potential investments to increase their home's value.

As you walk them through each option, you could say, "I'm going to lay out all of the options for you at each stage of the transaction, just like this, for you to choose from. I am here to help and serve as a guide and advisor through this process so that you are able to reach your goal with confidence. Okay?" By asking "Okay?", you're seeking their agreement and reinforcing that they are in control, ensuring they feel validated and heard.

## **6.3 Providing Direction**

Providing direction is more than presenting choices; it's about stepping in when your clients feel overwhelmed or uncertain. As their guide, you will need to ask open-ended questions to help them clarify their thoughts and feelings. This could be as simple as asking a buyer, "How important is a large yard to you?" or asking a seller, "What's your timeline for selling your property?" These questions can help your clients express their priorities and better articulate what they truly want.

## **6.4 Summary**

The "Driving" stage is a critical point in a real estate transaction, requiring you to balance providing insightful advice with empowering your clients to make their own decisions. By laying out all the options clearly and offering your professional guidance, you equip your clients with the knowledge and confidence they need to navigate the process successfully. By ensuring their understanding and agreement at each step, and letting them have the final say, you also build their trust and confidence in you, paving the way for a smoother transition to the next stage.

# **Chapter 7: Next Steps**

## **Set Expectations**

**\*\*YOU HAVE TO INTRODUCE THE NEXT STEPS IMMEDIATELY AFTER THEY AGREE TO OUR QUESTION**

**Objective:** We are simply setting expectations in their minds of their tasks and letting them know what we will be doing for them.

**Goal:** To ensure they are prepared and ready to either buy or sell their home. Setting these expectations will not only make our next steps clear, but also qualify them as a client.

## 7.1 Managing Expectations

The "Next Steps" stage of a real estate transaction provides a roadmap for your clients, defining the milestones and potential challenges ahead. It is an essential part of the process as it helps to manage your clients' expectations and prepare them for what's to come. It's an opportunity for you to showcase your expertise and reassure them that they are in capable hands.

## 7.2 Laying out the Process

You must outline the process your clients will follow over the coming weeks or months. This might include pre-approval for buyers, listing for sellers, property viewings, offer negotiation, inspections, closing procedures, and more.

Make sure your clients understand each step's importance and the possible time frames involved. Be honest about potential delays or issues that might arise, such as market fluctuations, inspection surprises, or negotiation complications. This transparency will help to build trust and keep your clients from feeling blindsided down the road.

## 7.3 Setting Realistic Expectations

Setting realistic expectations is crucial in the real estate business. Overpromising can lead to disappointment and damage the trust you've built with your clients. Discuss what they can realistically expect in terms of their budget (for buyers) or selling price (for sellers), the time it takes to close a transaction, and any potential hurdles they may face.

For instance, if they are buyers, inform them about the competitiveness of the current market and the possibility that they might not get the first house they bid on. If they are



sellers, discuss the factors that can affect their property's marketability, such as its location, condition, and the prevailing market conditions.

## 7.4 Keeping Communication Lines Open

Communication is key in setting expectations. Make sure your clients know that they can reach out to you with any questions or concerns they might have during the process. Provide them with regular updates, even if it's just to say that there's no update. This constant communication will reassure them that you're on top of things and working hard on their behalf.

## 7.5 Reviewing Expectations

These are the expectations for us to list out for them as tasks to complete:

### **SELLERS:**

- Make sure that all the parties relevant to the sale of the property are present so we are able to move forward if we decide we are a good fit at the end of the appointment.
- Make sure you have the most recent survey, the current balance of any loans as well as exclusions, updates/upgrades during your term of ownership printed out on paper and ready at the time of the appointment. (This shows they are serious)
- Make sure we are able to tour the entire property inside and out.

### **ME:**

- Run the comps in the area in detail for the subdivision and surrounding area
- Do our research on all comps and subject properties history and condition
- Ready for guided tour of the property to make notes of each areas condition to suggest improvements for marketing
- Complete and print out the supporting documents, disclosures and listing agreement

### **BUYERS:**

- You will get proof of funds in writing from your bank or submit an application for a pre-approval from one of our trusted lending partners today and get it back to me via email.

- You will confirm receipt of the detailed list of homes I've sent over to choose from.
- You will pick out the top 3-5 homes that you would actually like to purchase seeing just the photos and information shown in the listing (max of 5 homes) and text/email me those addresses.
- We will be ready to submit 2-3 offers from those choices after touring them all that day.

#### **ME:**

- I will text/email the contact information and connect you with our lending partners.
- I will confirm receipt of your proof of funds or a pre approval in writing by replying "Confirmed" to your email.
- I will email a detailed list of homes for you to choose your top 3-5 options from.
- I will confirm receipt of the text/email and schedule the top 3-5 homes and schedule our tour (max of 5 homes) and have the briefs printed for us to make notes along each stop on pros/cons/condition.
- I will be ready to submit 2-3 offers after researching the comps and discussing the best offer price on each of the choices after touring them all that day.

"Does this sound fair to you?"

**Let them be the first person to speak here and we will get another "YES" from them which is what we need to move onto the next step.**

Great! Now onto the next step!

## **7.6 Summary**

The "Next Steps" stage is a critical juncture in the client relationship where you set the tone for the rest of the transaction. By clearly outlining the process and setting realistic expectations, you prepare your clients for the journey ahead. This proactive communication helps minimize stress, creates a smoother transaction process, and underscores your role as a trusted guide and ally.

# Chapter 8: Set The Appointment

## Lock It Down

**Objective:** We are locking in the appointment with them to an exact date and time.

**Goal:** Our main goal is to set the appointment and get in front of a qualified client.

### 8.1 Securing Commitment

At this stage in the process, you've guided your client through discovery, worked out logical steps, weighed up their options, and outlined the upcoming process. The time has now come to set the appointment and move forward with tangible action. Setting an appointment is more than just scheduling a meeting - it's about securing commitment and establishing momentum.

### 8.2 The Significance of Setting an Appointment

Setting an appointment signifies a shift from exploring possibilities and building rapport to actively advancing towards the client's real estate goals. It's a critical juncture that signifies progress and a mutual agreement to proceed. It creates a sense of certainty and provides the client with something concrete to look forward to.

### 8.3 The Art of Scheduling

Scheduling the appointment requires a delicate balance of assertiveness and flexibility. You need to propose a date and time confidently, but also be mindful of the client's

availability and preferences. Here's where your people skills come into play - discerning the best time to suggest an appointment and understanding when to push a little and when to step back.

***This is all you say:***

***“What is the best time for us to meet with all parties present today or tomorrow?”***

## **8.4 Confirming the Appointment**

Once you've agreed on a date and time, confirm the appointment to reduce any chances of misunderstanding or forgetfulness. You can do this verbally during the conversation and follow up with a calendar invite that reiterates the date, time, and purpose of the meeting.

Additionally, it can be beneficial to outline what the client should expect during this appointment, so they feel prepared and look forward to it. For example, if it's a viewing, provide details about the property and any documents they might need. If it's a consultation, briefly explain what topics you'll be covering.

## **8.5 Summary**

The "Set The Appointment - Lock It Down" stage is a pivotal moment in the client relationship where you transition from discussing options to making tangible progress. Successfully setting and confirming the appointment underscores your professionalism, keeps the client engaged, and sets the stage for the next steps in the real estate transaction. It's a crucial step towards making your client's real estate aspirations a reality.

# **Chapter 9: Confirm Expectations**

## Driving It Home

**Objective:** We are locking in what to expect on both sides and the outcome after completing all the tasks.

**Goal:** Our main goal here is to set the tone for what is about to take place and that we will be submitting offers or signing a listing agreement at the appointment.

### 9.1 Confirmation To Success

As you move through the sales process, it's critical to keep your client on the same page and ensure that you both have the same expectations. The "Confirm Expectations - Driving It Home" phase is all about affirming what has been discussed, outlining what will happen next, and securing the client's commitment to the process.

### 9.2 Significance of Confirming Expectations

Confirming expectations serves several essential functions in the client-agent relationship. Firstly, it minimizes misunderstandings that could jeopardize the deal. Secondly, it sets the stage for a smooth, predictable process, which can ease client anxiety and boost their confidence in your services. Lastly, it promotes accountability on both sides, creating a foundation of mutual respect and cooperation.

### 9.3 Steps to Confirm Expectations

To confirm expectations effectively, start by summarizing the discussions, decisions, and agreements made so far. It's good practice to restate these verbally, then follow up with written communication. This summary not only provides a record of the agreement but also gives the client an opportunity to correct any misconceptions.

Next, outline what the client can expect in the next steps. Discuss the actions you will take, any tasks the client needs to complete, and a rough timeline for these tasks. Be clear about what the client should expect and what you expect of them.

### 9.4 Securing Commitment

Finally, confirm the client's commitment to moving forward. Ensure they're ready and willing to take the next steps. You can achieve this by asking direct, but non-threatening questions such as, "Does this sound like a plan you're comfortable with?" or "Are you ready to move forward based on what we've discussed?"

This is all you do:

1. Ask them to repeat their tasks.
2. Repeat the tasks you will be doing.

Then the close:

### **BUYERS:**

Ask them: "Do we have time to speak with my lender now to get that pre-approval?"

Do a three way call with your preferred lender and the client right now if possible otherwise share the contact information via text/email CCing the lender as an introduction.

"Awesome! Now I'm off to go to work for you.

- I'll have the list of 20 properties over shortly for you to choose your top 3-5 from
- Text or email me back those and I'll get the tour scheduled and a calendar invite for \_\_\_am/pm today/tomorrow over to you
- Once I have the tour locked in I'll email you the tour guide with the starting address

When you have a question just let me know. Thanks and I'll talk with ya in just a bit!"

### **SELLERS:**

"Awesome! Now I'm off to go to work for you.

- I'll have a calendar invite over shortly for \_\_\_am/pm today/tomorrow

If you have a question or think of anything else just let me know. Thanks and I'll talk with ya in just a bit!"

## **9.5 Summary**

The "Confirm Expectations - Driving It Home" stage is crucial for maintaining a strong client-agent relationship. By summarizing the agreement, outlining next steps, and securing the client's commitment, you set the stage for a successful transaction. This process not only keeps your client informed but also empowers them, making them feel more involved and confident in their decisions.

# Chapter 9: The Power of C/8 - Transforming Leads into Clients

Upon reaching the end of this journey, you should now feel fully equipped to qualify leads and convert them into clients who are eager to do business with you. Through the eight-step Convers8 process, you have learned to effectively navigate and manage the intricate dance of a sales conversation, turning potential leads into committed clients.

## The Magic of Convers8

The Convers8 framework is magical because of its comprehensive and systematic approach. Each step is designed to guide you seamlessly from one stage to another, effectively turning an initially skeptical or indifferent lead into a client who feels understood, valued, and confident in your ability to meet their needs.

## Step-by-step Transformation

- **Discovery: Learn, Learn, Learn:** This initial step lets you gain vital insights about your lead, laying the foundation for a personalized and targeted sales approach.
- **Logic: Repeat, Confirm:** Here, you validate your understanding of the client's needs, ensuring you both are on the same page, fostering trust, and showing that you genuinely care.
- **Data: Build, Feeling:** Providing relevant and compelling data helps build a logical case for your services. By linking this data to their personal needs, you can stir emotional engagement, a potent motivator in decision-making.
- **Options: Menu Sell, Decision:** Presenting a range of options empowers the client to make informed decisions. It highlights your versatility and demonstrates that you prioritize their preferences.
- **Driving: Options, Direction:** You reinforce the client's sense of control by reiterating that they steer the decision-making process. This encourages their buy-in while subtly guiding them towards the optimal choice.
- **Next Steps: Set Expectations:** Setting expectations helps the client understand the process ahead, making them feel prepared and confident. It also shows your proactive nature and commitment to transparency.
- **Set The Appointment: Lock It Down:** Locking down an appointment secures a concrete commitment from the client, transitioning them from prospect status to an active participant in a business relationship.
- **Confirm Expectations: Driving It Home:** Lastly, confirming expectations reinforces the agreements made, ensures both parties understand their roles, and solidifies the client's commitment.

## Summary

With the Convers8 methodology, you're not just selling a service or a product - you're creating an interactive, personalized, and empowering journey for each client. This holistic approach goes beyond mere sales strategies. It focuses on building strong, respectful relationships that inspire clients to entrust you with their needs. So, now equipped with these eight steps, step forward confidently into your sales conversations, ready to transform leads into committed clients.



# Chapter 10:

# Implementing C/8

# with User-friendly

# Templates for

# Buyers and Sellers

## Buyer Call Template

### Discovery

“I can ask you the same questions 99% of the agents out there will and end up going down the wrong path. That is absolutely not my goal. I’d like to learn about you, a day in the life in your shoes, which is where I will get the information we absolutely need for me to provide the best service to you and your family. These are personal questions, so I’m asking permission first. Would you be open to having a conversation like this?”

These are a few question topics as an overview of this process you can ask to get the ball rolling:

- Great, take me through a day in the life of you. Let's start with your morning routine...
- Learn, Learn, Learn... **LISTEN SO AND MAKE NOTES ON THE INFO SO YOU CAN REPEAT IT BACK LATER**
  - ☐ Kids
  - ☐ Pets
  - ☐ Hobbies
  - ☐ Church
  - ☐ Friends
  - ☐ Work
  - ☐ Cars
  - ☐ Clubs
  - ☐ Get it all!
- What area of the home does your family spend the most time in... tell me about that?
  - ☐ Kitchen
  - ☐ Livingroom
  - ☐ Gameroom
  - ☐ Bar
  - ☐ Porch
  - ☐ Driveway
  - ☐ Garage
  - ☐ Bedroom

**What to do when the lead is not responding or giving one word responses. Stop the process and ask permission to proceed with personal questions so that you may learn about them! If they aren't willing to do this you probably won't be a good fit to work together.**

### Logic

Show them you were listening by stating what you learned and confirming.

- ☐ "Thank you for sharing all of this with me! To make sure I got it all down correctly this is what I heard..."
- ☐ Repeat back in bullet points what you learned about them.
- ☐ Then ask them "Did I get that right? What did I miss?"

Once they've replied in full affirm their response

- ☐ "Ah, thanks! Now I've got the complete picture."

### Data

## Build the perfect scenario in their head!

- ☐ We want to build exactly what they want using their words from what they shared with us already and get them to state how they will feel when they walk through the door once it's theirs.
- ☐ The goal for us is painting the picture of the perfect new home for them in their minds.
- ☐ **This is the most important step! Get them to verbalize this feeling and you have a closing on your hands!**

## Options

Now it's time to present the options:

### For Buyers: 3 choices

- ☐ Brand new construction / Spec
- ☐ Established home in an established neighborhood
- ☐ Rental or stay where they are

Ask them which option is best suited to help them achieve their goal.

**Be quiet and give them time to think... The first person to speak here loses, don't be that guy!**

Once they have picked their option, show gratitude and congratulate them for choosing an option.

## Driving

"I'm going to lay out all of the options for you at each stage of the transaction just like this for you to choose from. I am here to help and serve as a guide and advisor through this process so that you are able to reach your goal with confidence. Okay?"

**By asking "Okay?" we are going for the close. Let them be the first person to speak here and we will get another "YES" from them which is what we need to move onto the next step.**

## Next Steps

### BUYERS:

- ☐ You will get proof of funds in writing from your bank or submit an application for a pre-approval from one of our trusted lending partners today and get it back to me via email.
- ☐ You will confirm receipt of the detailed list of homes I've sent over to choose

from.

- ☐ You will pick out the top 3-5 homes that you would actually like to purchase seeing just the photos and information shown in the listing (max of 5 homes) and text/email me those addresses.
- ☐ We will be ready to submit 2-3 offers from those choices after touring them all that day.

#### **ME:**

- ☐ I will text/email the contact information and connect you with our lending partners.
- ☐ I will confirm receipt of your proof of funds or a pre approval in writing by replying "Confirmed" to your email.
- ☐ I will email a detailed list of homes for you to choose your top 3-5 options from.
- ☐ I will confirm receipt of the text/email and schedule the top 3-5 homes and schedule our tour (max of 5 homes) and have the briefs printed for us to make notes along each stop on pros/cons/condition.
- ☐ I will be ready to submit 2-3 offers after researching the comps and discussing the best offer price on each of the choices after touring them all that day.

"Does this sound fair to you?"

#### **Set The Appointment**

"What is the best time for us to meet with all parties present today or tomorrow?"

**Let them be the first person to speak here and we will get the day and time from them which is what we need to move onto the next step.**

#### **Confirm Expectations**

This is all you do:

1. Ask them to repeat their tasks.
  - ☐ You will get proof of funds in writing from your bank or submit an application for a pre-approval from one of our trusted lending partners today and get it back to me via email.
  - ☐ You will confirm receipt of the detailed list of homes I've sent over to choose from.
  - ☐ You will pick out the top 3-5 homes that you would actually like to purchase seeing just the photos and information shown in the listing (max of 5 homes) and text/email me those addresses.
  - ☐ We will be ready to submit 2-3 offers from those choices after touring them all that day.
2. Repeat the tasks you will be doing.

- ☐ I will text/email the contact information and connect you with our lending partners.
- ☐ I will confirm receipt of your proof of funds or a pre approval in writing by replying "Confirmed" to your email.
- ☐ I will email a detailed list of homes for you to choose your top 3-5 options from.
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Then the close:

### **BUYERS:**

Ask them: "Do we have time to speak with my lender now to get that pre-approval?"

Do a three way call with your preferred lender and the client right now if possible otherwise share the contact information via text/email CCing the lender as an introduction.

"Awesome! Now I'm off to go to work for you.

- ☐ I'll have the list of 20 properties over shortly for you to choose your top 3-5 from
- ☐ Text or email me back those and I'll get the tour scheduled and a calendar invite for \_\_\_am/pm today/tomorrow over to you
- ☐ Once I have the tour locked in I'll email you the tour guide with the starting address

When you have a question just let me know. Thanks and I'll talk with ya in just a bit!"

**Congrats! You just locked in a qualified client who is ready to do business with you!**

## **Seller Call Template**

### **Discovery**

"Before we put the plan together to sell where you've been, we've got to figure out where you're going! Once we have that lined out, building a plan to sell your current property is easy."

"I can ask you the same questions 99% of the agents out there will and end up going down the wrong path. That is absolutely not my goal. I'd like to learn about you, a day in the life in your shoes, which is where I will get the information we absolutely need for me to provide the best service to you and your family. These are personal questions, so I'm asking permission first. Would you be open to having a conversation like this?"

These are a few question topics as an overview of this process you can ask to get the ball rolling:

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- Learn, Learn, Learn... **LISTEN SO AND MAKE NOTES ON THE INFO SO YOU CAN REPEAT IT BACK LATER**
  - ☐ Kids
  - ☐ Pets
  - ☐ Hobbies
  - ☐ Church
  - ☐ Friends
  - ☐ Work
  - ☐ Cars
  - ☐ Clubs
  - ☐ Get it all!
- What area of the home does your family spend the most time in... tell me about that?
  - ☐ Kitchen
  - ☐ Livingroom
  - ☐ Gameroom
  - ☐ Bar
  - ☐ Porch
  - ☐ Driveway
  - ☐ Garage
  - ☐ Bedroom

**What to do when the lead is not responding or giving one word responses. Stop the process and ask permission to proceed with personal questions so that you may learn about them! If they aren't willing to do this you probably won't be a good fit to work together.**

## Logic

Show them you were listening by stating what you learned and confirming.

- ☐ "Thank you for sharing all of this with me! To make sure I got it all down correctly this is what I heard..."

- ☐ Repeat back in bullet points what you learned about them.
- ☐ Then ask them “Did I get that right? What did I miss?”

Once they’ve replied in full affirm their response

- ☐ “Ah, thanks! Now I’ve got the complete picture.”

## Data

### Build the perfect scenario in their head!

- ☐ We want to build exactly what they want using their words from what they shared with us already and get them to state how they will feel when they walk through the door once it’s theirs.
- ☐ The goal for us is painting the picture of the perfect new home for them in their minds.
- ☐ **This is the most important step! Get them to verbalize this feeling and you have a closing on your hands!**

## Options

Now it’s time to present the options:

### For Sellers: 3 choices

- ☐ Clean, stage and prep the entire property for pictures, hire the right photographer and order the correct picture set, gather all market data to price the home correctly for max value, market the property on over 800 websites, schedule and hold all showings, vet each buyer and/or agent as well as their financial credibility, collect and execute all 37 documents for the sale to protect yourself from any later legal implications and act as the hub for all third parties like title, lender, appraiser, inspector, buyer agents, contractors and more to get the contract closed completely on your own.
- ☐ Hire me to represent you in selling/renting your home to achieve top dollar and a smooth transaction by coordinating all of this for you.
- ☐ Or hold onto the property and stay where you’re at.

Ask them which option is best suited to help them achieve their goal.

**Be quiet and give them time to think... The first person to speak here loses, don’t be that guy!**

Once they have picked their option, show gratitude and congratulate them for choosing an option.

## Driving

"I'm going to lay out all of the options for you at each stage of the transaction just like this for you to choose from. I am here to help and serve as a guide and advisor through this process so that you are able to reach your goal with confidence. Okay?"

**By asking "Okay?" we are going for the close. Let them be the first person to speak here and we will get another "YES" from them which is what we need to move onto the next step.**

## Next Steps

### SELLERS:

- ☐ Make sure that all the parties relevant to the sale of the property are present so we are able to move forward if we decide we are a good fit at the end of the appointment.
- ☐ Make sure you have the most recent survey, the current balance of any loans as well as exclusions, updates/upgrades during your term of ownership printed out on paper and ready at the time of the appointment. (This shows they are serious)
- ☐ Make sure we are able to tour the entire property inside and out.

### ME:

- ☐ Run the comps in the area in detail for the subdivision and surrounding area
- ☐ Do our research on all comps and subject properties history and condition
- ☐ Ready for guided tour of the property to make notes of each areas condition to suggest improvements for marketing
- ☐ Complete and print out the supporting documents, disclosures and listing agreement

"Does this sound fair to you?"

## Set The Appointment

"What is the best time for us to meet with all parties present today or tomorrow?"

**Let them be the first person to speak here and we will get the day and time from them which is what we need to move onto the next step.**

## Confirm Expectations

This is all you do:

1. Ask them to repeat their tasks.
  - ☐ Make sure that all the parties relevant to the sale of the property are present so we are able to move forward if we decide we are a good fit at



the end of the appointment.

- ☐ Make sure you have the most recent survey, the current balance of any loans as well as exclusions, updates/upgrades during your term of ownership printed out on paper and ready at the time of the appointment. (This shows they are serious)

- ☐ Make sure we are able to tour the entire property inside and out.

2. Repeat the tasks you will be doing.

- ☐ Run the comps in the area in detail for the subdivision and surrounding area
- ☐ Do our research on all comps and subject properties history and condition
- ☐ Ready for guided tour of the property to make notes of each areas condition to suggest improvements for marketing
- ☐ Complete and print out the supporting documents, disclosures and listing agreement

Then the close:

#### **SELLERS:**

“Awesome! Now I’m off to go to work for you.

- ☐ I’ll have a calendar invite over shortly for \_\_\_am/pm today/tomorrow

If you have a question or think of anything else just let me know. Thanks and I’ll talk with ya in just a bit!”

When you have a question just let me know. Thanks and I’ll talk with ya in just a bit!”

# Chapter 11:

## Convers8 Mastery - Mastering the Art

# of Client Conversion

Congratulations! You've successfully navigated the Convers8 process, understanding each of its eight steps, and you are well on your way to becoming a conversational maestro. However, the journey doesn't stop here. Just like mastering any craft, true proficiency in the Convers8 method requires continuous practice, reflection, and adaptation.

As a seasoned practitioner of the Convers8 method myself, I am here to guide you on this path to mastery. Allow me to share some valuable insights and practical tips that will take your Convers8 skills to the next level.

1. **Deepen Your Understanding:** Dive deeper into each step of the Convers8 process, continually expanding your understanding. Every conversation with a lead presents a unique scenario and diverse challenges. The more you understand the subtleties and nuances of each step, the better equipped you'll be to handle these diverse situations.
2. **Practice Makes Perfect:** Practicing the Convers8 method consistently is key to achieving mastery. Each sales conversation provides a valuable opportunity to refine your skills. Reflect on every conversation, analyze the techniques you used, identify areas where you did well, and those you need to improve.
3. **Listen Actively:** Effective communication is a two-way street. Listening to your client is as essential as talking. Practice active listening, make sure you understand your clients' needs and preferences correctly, and reflect them accurately in your responses.
4. **Adaptability is Key:** No two clients are the same. Flexibility is key in tailoring your Convers8 process to suit each client's unique needs. Be agile and ready to pivot your strategies based on the dynamics of the conversation.
5. **Sincerity Wins Hearts:** Clients can sense genuine interest and dedication. Show your leads that you genuinely care about their needs and are committed to

helping them. Authenticity creates trust, making your leads more willing to turn into clients.

6. **Lead with Empathy:** Always remember that you are dealing with people who have their aspirations, fears, and expectations. Understanding their emotions and showing empathy can create a powerful bond and significantly enhance your success rate.
7. **Continuous Learning:** The real estate industry and customer behavior evolve over time. Stay up-to-date with the latest trends and adjust your Convers8 strategies accordingly. Your commitment to learning will ensure you remain a competent and successful realtor.

Remember, mastery is not a destination, but a journey. As you delve deeper into your Convers8 journey, you will discover more about the process, your clients, and even yourself. The mastery of Convers8 is not just about the technical understanding of the steps but also about becoming an empathetic, adaptable, and sincere realtor who clients trust and appreciate.

Bear in mind that every step taken, every conversation had, and every relationship built brings you one step closer to becoming a Convers8 master. So continue on this path with an open mind and heart, ready to learn, grow, and excel. After all, mastery of Convers8 is not just about converting leads; it's about making a meaningful difference in people's lives—one conversation at a time.

# Chapter 12:

# Conclusion

In the conclusion of this journey, I want you to remember that Convers8 is more than a system; it's a philosophy, a shift in mindset. It's about embracing the role of a realtor as

a small business owner and, crucially, as a problem solver for your leads. It's about understanding that activity and consistency are the fundamental drivers of success in real estate, as in any business.

Remember that the success of the 13% of realtors who make it isn't a fluke. They succeed because they choose to lean wholeheartedly into systems like Convers8, understanding the true value of meaningful, personalized interactions with leads. They understand that conversion isn't merely a game of numbers, but rather a testament to their ability to genuinely connect with potential clients and guide them towards making their dreams a reality.

As we wrap up, it's crucial to reiterate the importance of the Convers8 methodology. Its human-centric approach deviates from the traditional, transactional perception of the real estate industry, instead emphasizing the importance of forging genuine connections and treating every real estate transaction as a significant life event.

The success of the MTX Realty agents who have used Convers8 is a testament to the efficacy of this approach. We've seen time and again that agents who immerse themselves fully in this process not only survive in the real estate industry but thrive, growing their business, leading their teams, and eventually opening their own offices.

As you move forward in your journey, keep the Convers8 method in mind. Embrace the system, embody its principles, and put them into practice every single day. Take your business seriously, focus on producing leads and solving their problems, and keep the formula of activity plus consistency at the forefront of your mind.

It's been my pleasure to guide you through the intricacies of the Convers8 method, and I'm confident that, if put into practice, it will equip you to navigate the challenging landscape of real estate sales successfully. No matter where you are on your journey, remember: the power to create lasting, fruitful connections lies within you. It's about tapping into that potential and harnessing it for the benefit of your clients and your business.

Finally, know that the journey doesn't end here. This book has given you the tools, but their application is up to you. Be diligent, consistent, and compassionate in your approach, and the results will follow. The real estate industry is indeed a challenging path, but armed with the Convers8 method, you have everything you need to find your place among the 13% and build a successful, rewarding career in real estate.

So, set your goals, remain committed, and embrace the journey. Your path to success in the real estate industry awaits. Let the Convers8 methodology be your compass, guiding you through the obstacles and towards the promising vistas of success. Stay passionate, stay focused, and, most importantly, keep conversing. Because every conversation is a step towards success. The power is in your hands. Now, go forth and conquer!