

# **SHIFT TACTIC 3: EFFECTIVE PEOPLE LEVERAGE**

WORKING WITH THE RIGHT PEOPLE IN THE RIGHT WAYS



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## Acknowledgments

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# Perspective

*"The more things change, the more they stay the same."*

– NINETEENTH CENTURY FRENCH PROVERB

*The Millionaire Real Estate Agent* teaches us that, to achieve at the highest level, our focus must be on the activities that matter the most—the Three Ls: Leads, Listings, and Leverage. These are the fundamentals. These are the goals. These are the things that should matter the most for any agent, in any stage of their career, and in any market.

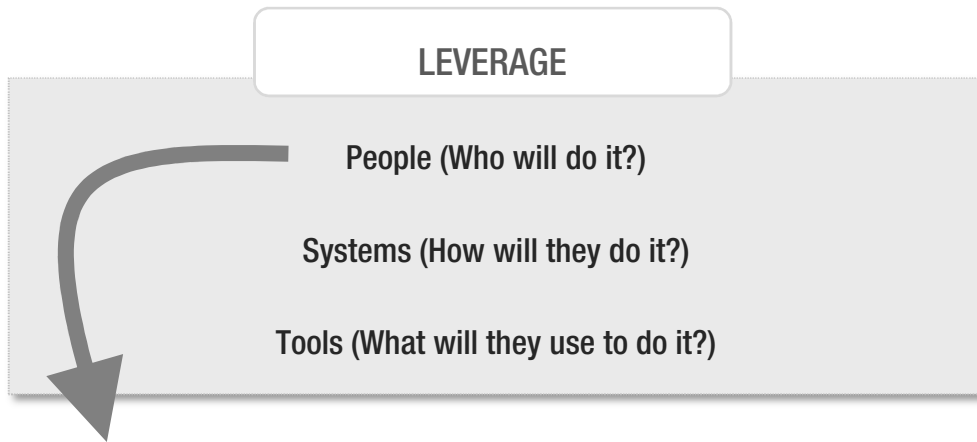
Agents who understand this truth and continue to focus on mastering leads, listings, and leverage will be the ones to not only survive in a shifting market, but **thrive**. They may change some of their tactics, but these agents don't panic and let the market dictate their strategy.

"Ultimately you will make it in whatever market you are in if you have a plan, you follow it, and you take it to the end," states Darla Buehler of The Buehlers & Associates in Flower Mound, Texas. "Of course, you may have to tweak it. We've tweaked our plan numerous times. Now we make sure we have coaches, and we attend all masterminds and training classes we can find because these help us prepare and know what changes we need to make."

# The Power of Leverage

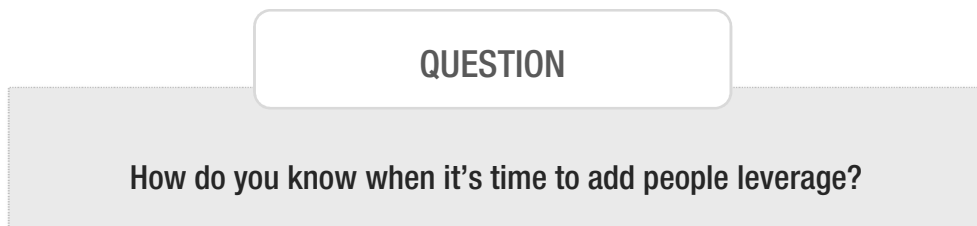
*The Millionaire Real Estate Agent* also teaches us that when you put your energy, creativity, and skills into achieving the first two Ls—generating **leads** and building the **listing** side of your business—you almost certainly will need **leverage** to break through to the next level.

Keller Williams Realty is known for helping agents run their business like a business. And running a real estate business requires a solid appreciation for the power of leverage—the Who, How, and What that will help you get things done.



High achievers know that all three forms of leverage—People, Systems, and Tools—must be used in concert, but that the **people** are the most powerful form of leverage.

In fact, if you find the right people, they will bring with them the systems, tools, and know-how to automate, standardize, streamline, and organize your business. They'll free you up to do what you do best and together you'll take your business to the next level.



Take a moment to assess your situation.



1. Which of your activities are the most “dollar productive”?

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Let’s not forget that you are in the real estate sales business. So, you should have answered that the activities that make you the most money are lead generation, lead conversion, listing houses, and selling houses. You might also add that your time is well spent on training and practice to help you build those skills. As your business and team grows, additional dollar-productive activities will be recruiting, hiring, training, and consulting your staff. That’s it. Those are the critical money-making activities that need to matter the most to you.




So, how many hours a day are you spending on activities *other than* lead generation, lead follow-ups, and appointments? Are you buried under transaction paperwork? Are you spending hours preparing marketing, addressing mailers, updating webpages, bookkeeping, staking signs, refilling flier boxes, building trend charts, and calling mortgage and title companies to check progress?

These tasks have to get done. However, when you see that these tasks are not the tasks that bring you joy and they are taking more time than you are able to give to the critical activities of generating new business, taking listings, and selling properties, you need to reevaluate your situation. You need leverage.



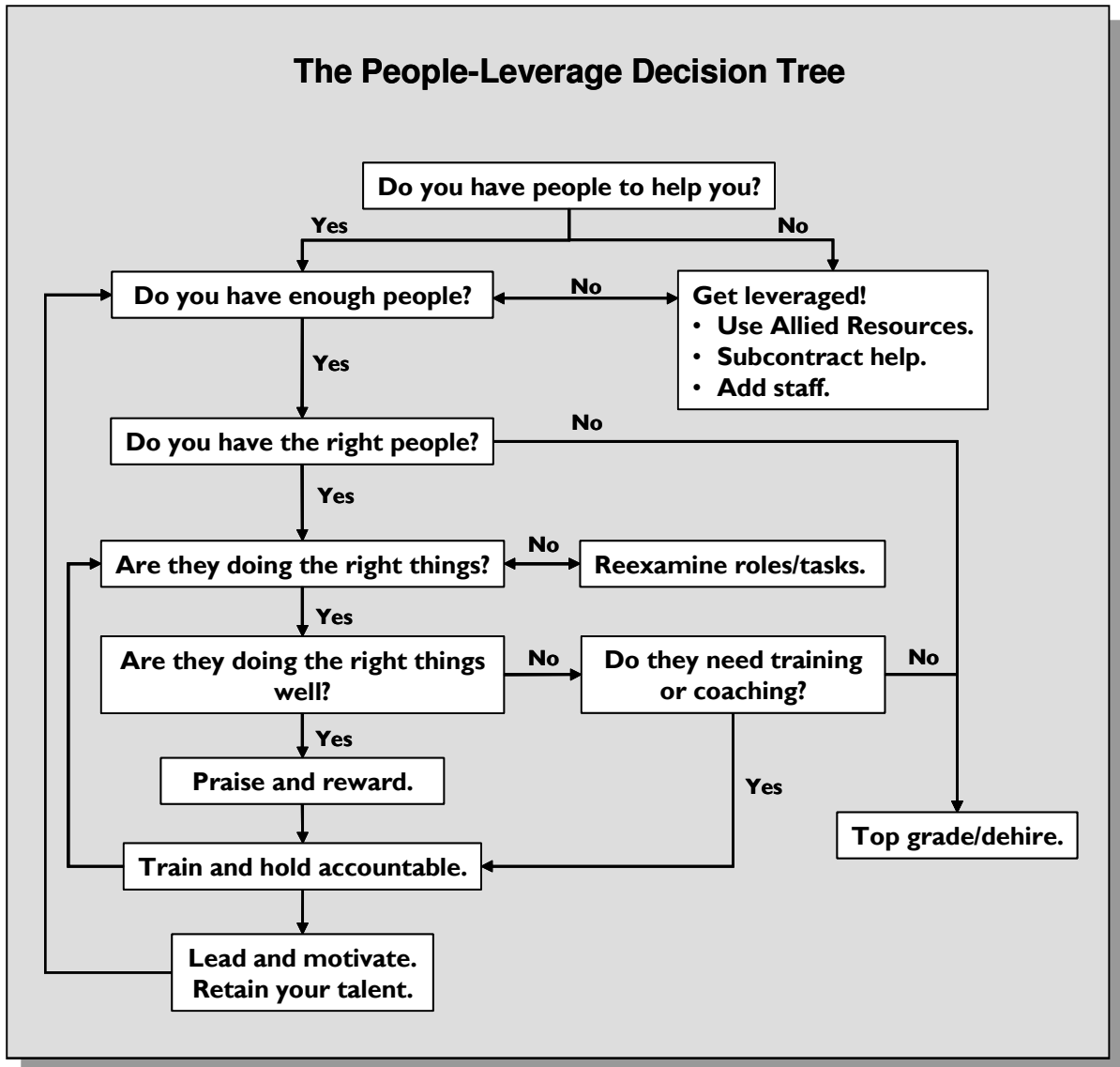
# Change the Way You View Your Business

Begin to change the way you view your business from a do-it-all-yourself enterprise to one which is leveraged with help from others.

Yesterday	Today
<p style="text-align: center;">"I did it."</p> <p style="text-align: center;"></p>	<p style="text-align: center;">"We do it."</p> <p style="text-align: center;"> </p>
<ul style="list-style-type: none"> <li>■ You did it all.</li> <li>■ Your vision for your business was in your head.</li> <li>■ You didn't need job descriptions. You did it all.</li> <li>■ You answered to you.</li> <li>■ You were the only trainee.</li> <li>■ You had the power of one. Without effort.</li> <li>■ Your work environment was just about your effectiveness. It had to work for one</li> </ul>	<ul style="list-style-type: none"> <li>■ The work is divided up.</li> <li>■ You must now communicate your vision.</li> <li>■ You now need two (or more) job descriptions.</li> <li>■ Someone else answers to you.</li> <li>■ You are a trainee and a trainer.</li> <li>■ You must create the power of two (or more). This takes direct effort.</li> <li>■ Your work environment is now about team effectiveness. It has to work for all of you.</li> </ul>

*Maybe  
someday:  
"They do it."*

# You Have Some Decisions to Make: The People Leverage Decision Tree



The People Leverage Decision Tree helps illustrate the sequence of questions you should be asking yourself before you pursue people leverage, once you have them in place, and as you evaluate their performance and contributions.

Be careful not to assume that this decision tree is only about staff—hiring, evaluating, eliminating staff. This tree helps you make smart decisions about building a team. This tree helps you effectively leverage your network, subcontractors, and employed staff.

Gene Rivers explains what adjustments his wife Rebekah Rivers, as CEO of their 7th Level agent team, had made to address the market shift in Tallahassee, Florida. “She’s moved several people out of positions and new people into positions,” says Gene. “She had some of the wrong people on the bus, and she found that some of the people were doing the wrong things. Rebekah also led by example. She got everybody on a daily accountability for prospecting and lead generating. She also committed to jumping back in and doing it herself—making calls to past clients and ‘Mets’ each day.”

You may be in the stage of your career where you are a solo agent. You are all things in one. You’re a lead generator, a buyer’s agent, a listing agent, a bookkeeper, a runner, a marketing coordinator, a call coordinator ... and the list goes on.

You can still have a team. In fact, to succeed, you must have a team.

### THE TEAM CONCEPT

**Start thinking about your “team”—not just as the people you employ, but as the larger circle of people in your life who can help you achieve your goals.**

[illegible]

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# got leverage?:

## Acquiring the Talent You Need

The help you need may come from a variety of sources. You will find your three key sources to be

1. Your network of Allied Resources
2. Individuals who will work for you as subcontractors
3. Individuals you will employ on your team

## Leverage Your Allied Resources

Every day, you come in contact with people you should consider your Allied Resources—people who can help you build, sustain, and improve your business. The vendors you turn to, your colleagues in real estate, professionals in the community, friends, family, and others who can offer aid.

Have you asked your Allied Resources how they might be able to help you?

### **SCRIPT:**

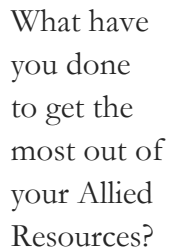
I'd love for us to find a way to work together to meet our business goals. You know that my goal is to \_\_\_\_\_. Is there anything you might be able to do to help me achieve this?

What other services do you provide that I am not aware of? ... Is there anything else you can think of? ...another place where our businesses overlap? ...Anything else we haven't discussed?

Again, thank you. Now let's talk about how I might return the favor and help you with your business!

The beauty of this strategy is that you will often uncover services and assistance that your Allied Resources can provide without any cost—or at least without a dollar cost—to you. You may agree to a barter arrangement—a win-win.

- If local mortgage or title companies create high-quality charts and graphs to use in their own presentations about market trends, ask if you can leverage these as well.
- Of course you would expect your lender partners to prequalify and preapprove your buyers and sellers, but they should also be available to you and your customers to answer questions about financing options.
- At closing, ask the closing company if you can piggyback onto their standard postclose mailings to the buyer and seller. You can add a “Welcome to Your New Home,” “Congratulations,” or other final message to the mailing they’re already planning to send. A nice touch—leveraging a single stamp!
- Find out which other types of businesses are targeting your same geographic farm (e.g., restaurants, tree-trimming services, housecleaning services). Partner with them to update your database of addresses, and look for creative ways to co-market your services.
- Offer to mentor new agents in the office, giving them experience showing homes, preparing fliers, writing contracts, entering MLS data.
- Create an “internship” position for a young person interested in learning more about the real estate industry.
- Contact local colleges and technical schools to inquire if a student in the technology field would be interested in designing/building your website as a course project.
- Inquire if graphic arts students would be available to create marketing materials, website images, stationary, etc., as a course project.
- Partner with local, regional, and national moving companies to promote their services and to be the first to learn when people are moving in and out of the community.
- Ask other agents who are looking for experience to host open houses for your listings. Hold them open each weekend.
- Partner up with other agents to hold networking events.



What have you done to get the most out of your Allied Resources?

Rebekah Rivers of The Rivers Team approached local companies about a marketing campaign inline with their paperless, “go green” program. “We have a subset of our database we call our Special Client Club,” explains Rebekah. “Every month, we send out email certificates worth \$5 to a different local vendor. It could be to Marble Slab Creamery, or it could be to TCBY, or it could be to Connie’s Hams.”

“The best part about it is that when these clients get the certificate with their name on it, they find instructions that say, ‘You need to email your favorite agent or call them to get the code.’ If they don’t do that, it stills give the agents an excuse to call the ones that they want to call and say, ‘I’m calling to give you the code this month for your certificate,’” explains Rebekah.

This great no-cost program is going like gangbusters for The Rivers Team, who must now think very selectively about who gets to be a member of the Special Client Club and how often they send the promotionals!”

## Communicate Your Expectations and Standards

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Even though you are not in an employer/employee relationship with your Allied Resources, you must ensure that their activities and behavior reflect well upon you and reinforce your standards of customer service and professionalism. Communicate up front what you expect of them and of the relationship. This should be a two-way dialogue—so, listen as they offer their expectations and standards of performance as well.

## Subcontract Your Way Up

Free partnerships with Allied Resources are a great, creative way to get more done—without adding any personnel overhead to your operations. If your finances allow, however, you may need to take the next step and contract with professionals to help you address specific business and personal needs.

### Business Tasks

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You may be able to contract with someone to fulfill work tasks such as the following:

- Bookkeeping/accounting
- Data entry (including MLS entries)
- Database administration
- Appointment scheduling
- Printing/Mailing (prelisting, relo, marketing)
- Website design and maintenance
- Website listings, virtual tours, and content development
- Search engine marketing
- Print marketing (brochures, fliers, etc.)
- Courier/runner tasks
- Transaction coordination
- Contract management
- Call center/phone answering/IVR services

How are you leveraging contract labor?

When Bruce Hardie, regional director, was a mega-agent in Spokane, Washington, he contracted with a part-time runner/courier and asked him to pick up the responsibility of checking vacant listings twice a week. The courier uses a property checklist to check all the doors and windows to make sure they are secure and makes sure the heat has not been turned up or down. He reports on the condition and showability of the house.

“When it snows,” says Bruce, “he will shovel the walk to the front door. That is a different level of service. He gets paid minimum wage plus miles, and that is a very affordable deal for me. He’s a retired school teacher, and he is loving it.”



## Personal Tasks

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You may be able to contract with someone to fulfill personal tasks such as the following:

- Housecleaning
- Child care/elder care
- Pet sitting
- Home and car maintenance
- Bill preparation/bookkeeping
- Yard care
- Grocery shopping/meal preparation
- Pool maintenance
- Errands

Remember your list of activities that make you money and those that bring you joy? Keep these activities for yourself and look to contract out as much of the remainder that your budget will allow.

## Where to Look

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### Question

**Where do you find professionals who are looking for part-time, per-transaction, or short-term work assignments?**

Start by finding out what services your Market Center office offers. Your Market Center may provide or know of individuals who provide specialized professional services. Some Market Centers have a contract management specialist who assists agents on a per-transaction basis, for example.

Some agents are finding that, in a downshifting market, it makes sense to share resources—particularly administrative help. If you are not aware of other agents who are interested in sharing resources, contact your Market Center and let them know you are seeking this type of arrangement. They may be able to play matchmaker for your needs.

Here are some other great sources for subcontractor talent:

- Allied Resources—In addition to your vendors, partners, friends, and family, don't forget to leverage your community connections (churches, schools, HOAs, etc.) for candidates and referrals.
- People currently holding such a position—These individuals may want to join you or they may have candidate names to refer to you.
- Temporary Employment Agencies
- Recruiting Firms
- Real Estate Schools
- Job Websites
- Want Ads

## Go Virtual?

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Do you need serious administrative help, but are hesitant to hire staff under your current market conditions? Virtual assistants are a great way for you to leverage experienced, top talent without having to support someone on full-time payroll with benefits.

Virtual assistants (VAs) are professionals who use technology to offer administrative services from a remote location. If you have more work than you can handle but are not ready for a full-time assistant, VAs may be contracted on an as-needed basis. Use them as often or as seldom as you like. In addition, VAs work out of their own homes on contract, so you don't have to worry about office space, taxes, or benefits. All of this translates to a low staffing overhead. Most virtual assistants bill by the hour and do not require a retainer (set number of hours) per month. Others will work on a flat-fee basis.

## Communicate Your Expectations and Standards

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Set your team up to win. Let each subcontractor you go into business with know what you expect of them and know what you consider the standards for the job to be. Create job descriptions. Keep them flexible and review them regularly. Get agreement from your subcontractors that they are ready, willing, and able to carry out these responsibilities to the quality and performance standards you define.

**Are you ready, willing, and able?**

Are you ready to subcontract professionals to help you with specific needs? Why or why not?

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Is your business (sales volume, budget, etc.) able to support this decision at this time? Why or why not?

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Which tasks will you look to contract out?

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Who do you know who can help you address these needs?  
(candidate names or people who can refer you to talent)

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# Getting the Most Out of This Experience

You have begun an exciting journey toward ramping up your business. What kind of student will you be in this class?

<b>The Prisoner</b>	<b>The Vacationer</b>	<b>The Explorer</b>
<i>Has to be there, doesn't want to be there, and doesn't know why they're there.</i>	<i>A day in training is better than a day on the job.</i>	<i>Excited and curious about the new knowledge, skills, and tools they will discover in class.</i>
<b>Doesn't engage</b>	<b>Spends as much time chatting as listening</b>	<b>Listens attentively, then participates fully in discussions and exercises</b>
<b>Spends class time catching up on their emails</b>	<b>There to have fun—distracts the class with irrelevant comments</b>	<b>Asks meaningful questions and contributes compelling aha's</b>
<b>Escapes by spending time in the hall on their phone</b>	<b>Returns late from break and lunch</b>	<b>Arrives to class on time and returns promptly from breaks</b>
<b>Holds on to limiting beliefs</b>	<b>Not purposeful in their learning goals</b>	<b>Adopts a posture of acceptance</b>
<b>Multi-tasks on their computer by working on side projects</b>	<b>OMG! Spends the day on their smartphone, texting and checking Facebook</b>	<b>Takes notes in their manual for future reference</b>
<b>Picks fights with trainer or other participants if they don't agree</b>	<b>Isn't paying attention</b>	<b>Respects the different learning styles and opinions of others</b>

*Hopefully you picked “The Explorer!”*

# Hire the Best

While no-cost partnerships may offer some assistance, and part-time subcontracts will likely get you even closer to your goals, the next step is to hire on permanent staff.

*"First leads, then income, then help. We call this leading with revenue,' and it's smart business."*

Gary Keller, cofounder and chairman of the board, Keller Williams Realty



What has hiring a team done for you?

Rick Hale, top producer from Atlanta, Georgia, recalls the days before he had his team of fourteen running like a well-oiled machine. "In my third or fourth year in my real estate career we opened one of the first offices in Atlanta. I had a good year with 55 units, but I was tired of doing it all. I was just not capable of serving all people in all ways with just my abilities."

Rick attended a Mastermind session at Family Reunion and began to learn about building a team. He learned the 80/20 Principle, which stresses that if you focus on the 20 percent that really matters, those activities will yield you 80 percent of what you want. He also learned how to identify his Big Rocks—the key goals for his business and personal life. He returned to Atlanta and began hiring talent onto his team.

"Having a large highly productive team," says Rick, "has given me the time to really focus on big picture thinking—working *on* my business, not *in* it. I consult, motivate, and train. I operate like a CEO and co-create action plans and accountability strategies necessary to track in-coming results instead of carrying the load of working the streets, as in the past! Now, I am working towards perfecting my role under the new title 'Director of Positive Energy and Fun!'"

"In 2007, we closed 236 homes with just over \$35 million in production volume. Not bad, considering that no buyers spent time in my car, and I personally listed fewer than 3 homes! That's leverage, and, man, do I love my team!"



Do you still  
hire in a  
shifted  
market?

Mega agent Rick Brenkus of The Brenkus Team in Las Vegas, Nevada, was in a shifted market with sales volumes down more than 48 percent for the year. He made the business decision to reallocate the \$10,000 a month he was spending on Yellow Page ads and instead hire more team members.

“We increased our staff. We added a second listing manager and we hired a team manager to help put out fires, present offers, and hold the team accountable to goals. We also added more full-time buyer agents and listing agents.”

Rick explains his strategy: “I believe that all great businesses are built in a shifted market. Our goal was not only to maintain what we’d done, but to increase market share. We had a number of leads coming in and we needed to work on conversion skills. With more people on both the buyer and listing side, had a much higher conversion rate.”

## Follow the Career Visioning Process

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A major factor in promoting your business’s efficiency, growth, and profits will be your ability to find and hire talented people who are a match for the performance expectations and behavioral requirements of the job. The right person in the right job has a high chance of job success; the right person in the *wrong* job can be a disaster!

Companies of all sizes and in every business field lose thousands of dollars each year because they select people who do not have “the capacity to produce” in key jobs. The cost of turnover increases dramatically when we add in the expense of training, additional hiring and training expenses, lost time and production, and perhaps even lost business through dissatisfied customers served by mismatched individuals. In addition, team managers personally experience discouragement and frustration in their own jobs when they realize they must begin all over to recruit a replacement for a key position.

At Keller Williams Realty, we follow a defined process—called Career Visioning—that helps us identify talent, get into relationship with them, and make smart, informed decisions about their fit for our organization.

### *Steps in the Career Visioning Process*

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The Career Visioning process begins with thoughtful planning and analysis of who you want and need in your business. Screening candidates is the first step in the formal process, but the activities that help you generate leads for great talent should become an ongoing aspect of how you do business.

Once you've identified a strong candidate, the KPA behavioral assessment verification and information gathered in multiple in-depth Interviews will inform your decision to continue the process. Getting Perspective from others, the next step, is essential to offer more insight into the candidate's work history and experience.

And finally, the Commitment Interview is your chance to address any points of incompatibility, discuss expectations, and—hopefully—make an offer to the candidate to be the next member of your team.

**RESOURCE**

Learn more about the Keller Williams hiring system in the Keller Williams University course Leverage Series: Career Visioning.

*The people you hire must be talent. And if you are facing the additional business challenges of a down market, you must ensure that these people are “heavy lifters.”*

## Your Goal: Build a Team of Talent

Make sure all the people you hire are the S-A-M-E!

**S** Smart; quick; intelligent. It's as much about EQ [emotional intelligence] as it is about IQ.

**A** Attractive to clients and to others

**M** Motivated

**E** Ethical

As you interview candidates for a coveted position on your team, you must learn to distinguish between talent and non-talent:

	Non-Talent in a Role	Talent in a Role
1	Brings you _____	Finds solutions.
2	Doesn't fulfill your needs and ends up giving you back _____	Shares your goals and fulfills your needs as a natural by-product of fulfilling their own.
3	Doesn't know what they want and isn't searching.	Knows what they want or is actively searching to know.
4	_____	Pushes you.
5	May not know where the existing bar is set or even what bar you're talking about.	Is continually raising the bar.
6	Doesn't care who they spend time with and _____	Demands to be associated with Talent and attracts Talent to them.
7	When they try to talk action and results, they can't _____	Talks the language of action and results.

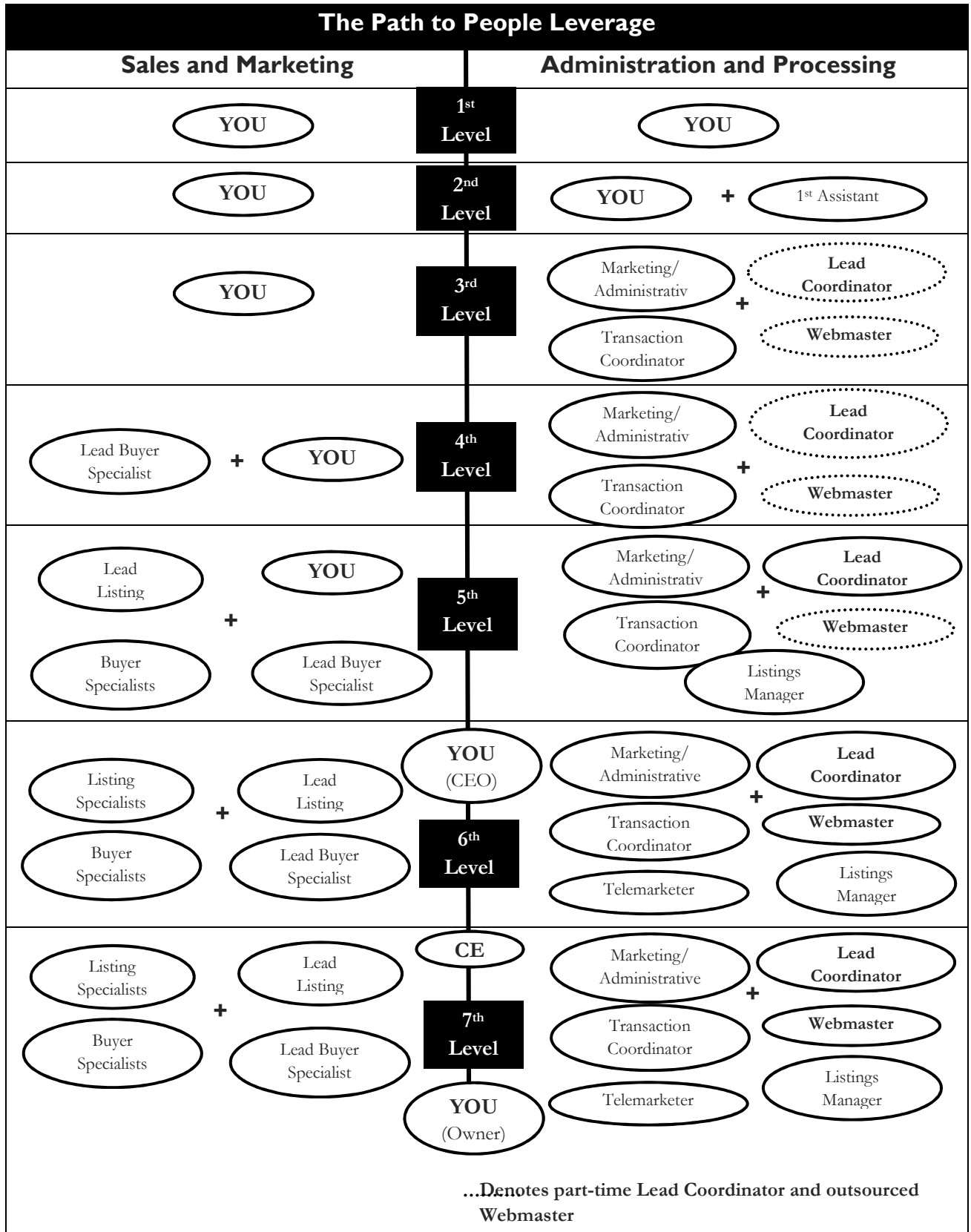
# The Hiring Path of a Millionaire Real Estate Agent

*The Millionaire Real Estate Agent* lays out what's called “the Path to a 7<sup>th</sup> Level Business.” Following this plan, you build your team by adding administrative help first, then sales, then more admin if needed, and so forth. You identify leaders for your buyer side and your listing side, and eventually, you identify someone to step in as CEO of your sales business and run it for you—allowing you to step out at the 7<sup>th</sup> Level and earn residual income by owning an asset-based business.

The seven-level Path to People Leverage chart on the following page was derived from the original chart in *The Millionaire Real Estate Agent*, but it also includes information about when to add technology support individuals to your team.



To learn more about the recommended organizational model for a Mega Agent, read *The Millionaire Real Estate Agent*.



## 1<sup>st</sup> Level: Do It All!

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You're on your own at this level. You are fulfilling all roles and responsibilities for your lead generation, lead conversion to sales and listings, transaction management, customer service, and office administration. Hopefully, you have begun to leverage Allied Resources and possibly subcontractors to help you.

## 2<sup>nd</sup> Level: Hire an Administrative Assistant

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One of your key hires will be your First Assistant. This individual owns all administrative activities for the team and allows you to focus on the 20 percent (lead generation and selling). Your assistant should create systems for servicing sellers, servicing buyers, lead generation, lead coordination, marketing, database management, and office support. In addition, your assistant should maintain all financial systems, filing systems, and databases; manage office communications; and provide customer service.

Once you are ready to expand the team further, your First Assistant should support all hiring activities, particularly those for additional administrative staff.

**TIP**

Check out KWU's *MREA Operations Manual and Forms: Appendix* (available on [www.KWConnect.com](http://www.KWConnect.com)). This is a comprehensive, customizable guide to running a Mega Agent office.

## 3<sup>rd</sup> Level: Hire Additional Administrative Staff

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At this stage, your First Assistant is likely ready to become more of a Marketing/Administrative Manager. The volume of your business will determine the need and speed of your growth, but your next hires will likely need to be administrative as well. Many Mega Agents hire on a full-time Transaction Coordinator to oversee the transaction process.

As more buyer and seller leads come in, you must care for proper lead management—particularly if you are using the Internet to generate leads. Many Internet buyers begin their buying process earlier and thus translate into longer cultivation and conversion times for you.

At this stage, you may choose to hire a part-time Lead Coordinator to record leads as they come in and track lead conversion activities. Until you add additional sales support and/or a full-time licensed Lead Coordinator, however, you will still be the one responsible for cultivating and converting leads into business.

The need for new sites or major updates to existing sites may be too infrequent to require you to hire a full-time staff member. Some Mega Agents also outsource various pieces of their Internet presence to different companies. They hire a web designer to build their site, and hire another company to handle their search engine marketing.

#### 4<sup>th</sup> Level: Hire a Buyer's Agent

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*"Only after you have great administration help (who in turn bring systems and tools), and they have helped grow your business to a point where there are more clients than you can handle, do you being the process of hiring real estate salespeople leverage."*

The Millionaire Real Estate Agent

As your business success continues, you will likely find that the buyer side of your business is growing and taking much of your time. You need to protect your time for lead generation and conversion and maintain a focus on listings ("when you have listings, buyers will come").

Your second key hire should be to support your buyer business: a Buyer's Agent. Search for top talent with the objective of hiring a Lead Buyer's Agent (or "Lead Buyer's Specialist") who can hopefully assume a leadership role as your team grows. Another alternative (a temporary one) is to hire a Showing Agent just to alleviate this workload until you can hire that top buyer talent to build your buyer-side business.

At this stage, your Marketing/Administrative Manager continues to manage your administrative staff.

## 5<sup>th</sup> Level: Hire a Listing Specialist, a Lead Coordinator, and Continue Building Administrative Staff

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Your third key hire is a Lead Listing Specialist, someone to assist you with your seller-side sales and marketing activities. Again, search for top talent that can serve in a leadership role as your sales team grows. It is often an emotional transition for Mega agents to share the listing side of their business with a Listing Specialist. Communicating expectations and standards will be key in effectively migrating your seller business to other professionals on your team.

At this stage, reevaluate your need for a full- or part-time Lead Coordinator. If you find a licensed individual to join you in this role, you will be able to train them in your sales techniques so that they can help you service the needs of leads and actively try to convert them into appointments.

Many Mega Agents leverage their buyer's agents to help service and convert leads. However, agents with big Internet-based lead generation strategies often find that their buyer's agents are so focused on servicing today's clients, that the cultivation of tomorrow's is often only done "when time permits," if at all. These Megs often choose to hire a full-time Inside Sales Agent with a focus on lead cultivation and conversion.

**TIP**

One successful agent created a Lead Coordinator position on their agent team and titled the position "Home Search Director." The Home Search Director was in charge of cultivating the website leads from registration to setting the appointment for the buyer consultation.

Other important roles to support your growth at this 5<sup>th</sup> Level include a Listing Manager and Telemarketer.

## 6<sup>th</sup> Level: Move into CEO Role and Allow Sales Staff to Drive Business

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At the 6<sup>th</sup> Level of your Path to People leverage, you will add additional Listing Specialists who will be managed by the Lead Listing Specialist. You should feel confident passing lead generation and sales activities on to the team, as you are clearly moving into the role of CEO of your real estate business.

A few of the top agents we interviewed had a full-time Webmaster on their team by this stage in their organizational development. In addition to creating new sites and updating existing sites, their in-house Webmaster also handled the day-to-day operation of the websites and acted as an in-house technologist for the day-to-day technology needs of the team. When you hire an in-house Webmaster, make sure that they are not only a good web designer, but that they can also help you with your search engine marketing and office computer systems. Whatever they do not do for you, you will have to pay someone else to do.

## 7<sup>th</sup> Level: Step Out of Business Operations and Enjoy Business Ownership

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At this final stage of the Millionaire Real Estate Agent's Path to People Leverage, your sales and administrative staff should be complete and well-rounded. You will have a CEO to run your business operations so that you may step out and serve as the owner of an asset-based real estate business that provides you with residual income

**TIP**

Want more information about the specific tasks and responsibilities of the roles on an MREA team? Go to [www.KWConnect.com](http://www.KWConnect.com) and use the search words "Career Visioning" to pull up some great resources.



# Take Stock of What You've Got

## Do You Have the Right People?

Congratulations! You're leveraged! Now, you have to ask yourself the following question, again and again and again: **Do you have the right people on your team?**

You should ask this scrutinizing question of your hires, but also of your subcontractors, and even your Allied Resources. When you are facing a downturn in the market and in your transaction volume, this will be the question that will lead you into the important discussion about “remargining” your business.

### RESOURCE

For more information about re-margining your business and cutting expenses in a shifting market, see Keller Williams University's *SHIFT Tactic 2: Expense Management*.

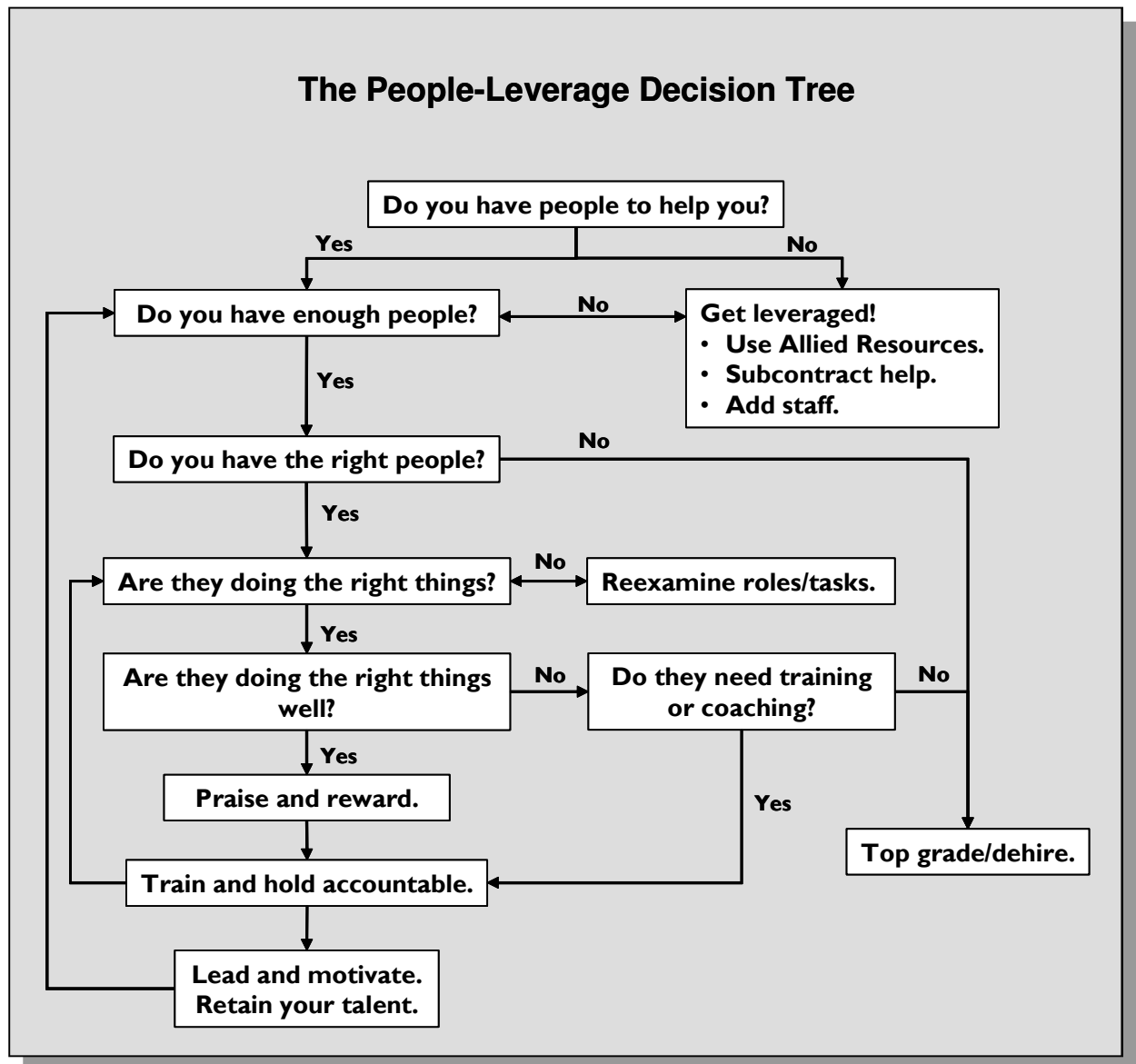
*“When a market shifts, what was smart money (money that we put behind proven, effective people) instantly becomes dumb money. Some people who do well in a growing market may be truly challenged to do as well in a shrinking one. Always put your money behind the right people. We call this Smart Money – Smart People.”*

Gary Keller

Let's look at the People Leverage Decision Tree again. Notice the sequence of the questions. You must determine if you have the right people *before* you get tangled up in assessments about whether they are doing the right things. You must determine if your people are talent in the way that you need them to be. This is essentially a Yes or No question. If you skip this question and begin asking if their scripts are effective, if they are providing your standard of customer service, if they are strong on lead conversion, if they manage your books with the right software applications ... you are missing the point.

**The right people are the right people**, even if they need some training or coaching or a modified job description. They fit the definition of talent, they're a behavioral match, and you want them on your team in some capacity.

**The wrong people are the wrong people.** By definition, the wrong people can't do the right things. They are not a fit. They're not talent. And you have to take action.



Some agents assume a “parental” relationship of obligation with their people and feel great guilt and discomfort about evaluating the value and performance of their team members. You must remember to see your business as a business. And in a shifting market, your business may be a business at risk.

In hotter market conditions, team members with so-so skills may have remained on the team protected by statements like “He’s a good guy,” “Every transaction helps,” “This next year will be his year; I just know it!” “Well, he tries hard; that should count for something,” “I have known his family for years,” “He’s my second cousin,” “I haven’t had time to think about recruiting anyone else ...”

A shifted market can have many effects on your business. One is that it often exposes weaker talent that has been coasting along on the good times. The market may also expose the fact that your lead generation plan and your lead conversion techniques just aren’t going to cut it anymore. The tactical changes you make may have a people impact. Some people will no longer possess the specific skills and behaviors you need for the new market.

Look for these essential attributes in employees, subcontractors, and Allied Resources:

1. Strong work ethic
2. Resilient attitude
3. Trainable and into mastery
4. Willingness to follow your systems



### **From Here to There**

Think about the people on your team and the goals you have for your business.

#### **1. What do you want?**

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#### **2. What do you have now?**

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### People-Leverage Assessment Exercise

Use the space below or a separate piece of paper to draw a diagram of your current team structure. (If you don't currently employ staff, you can draw your sphere of key Allied Resources and subcontractors.)

Critically assess which team members are strong performers, which are weak performers, and which (if any) need to be completely removed from your business in order for you and your team to become more profitable, productive, stress-free, unburdened, at peace ...

Use a scale of 1–10 to rate the value of these team members to your business or the level of their performance.

1	2	3	4	5	6	7	8	9	10
----- -----									
<b>Below Avg</b>				<b>Average</b>		<b>Well Above Avg</b>			

Use colored markers to mark your evaluations (e.g., green for Well Above Average, red for Average, brown for Below Average).

Now, with a better understanding of your current organization, assess your true people-leverage needs.

### Critical Assessment of My Team

Write your thoughts below as you consider your team members.

## Are Your People a Behavioral Fit?

Each job role has its own “behavioral requirements”—meaning that certain behavioral styles will be best suited for the job and will help the person achieve at the highest level with the least degree of stress and discomfort. When the behavioral traits of a person match the behavioral requirements of the job, they’ll experience “job behavioral comfort.”

Most jobs have some discomfort. However, when a person’s behavioral traits are not matched to the job, “job behavioral discomfort” is more likely to result—and this can lead to **bad business** for all involved.

### Signs and Symptoms of Job Behavioral Discomfort

- Fatigue
- Fear
- Physical-illness
- Stress
- Depression
- Frustration
- Insecurity
- Withdrawal
- Weight Change
- Burnout
- Anxiety
- Short-temper

No one wins if a person is forced into a role that does not suit their behavioral strengths and does not allow them to thrive and feel satisfaction.

You don’t have to be an expert in the KPA behavioral assessment to put some thought into identifying the behavioral requirements of the positions on your team. What behavioral tendencies are critical for success?

It’s not your job to be a “parent” to your people, but it is your responsibility to communicate the expectations and requirements and to do your best to place people into roles that fit them and that will lead to job comfort and a natural motivation to succeed.

## Do You Need to Top Grade or Dehire?

*"Always be upgrading and never settle. Find the best, expect the best, and continue to work with only those who deliver the best...I encourage you to have the courage to top grade...When people don't do what they say they'll do or don't care about doing it well, move on to those who do care."*

The Millionaire Real Estate Investor

Revisit the People-Leverage Assessment Exercise you completed in this chapter. Did you remember to include Allied Resources and subcontractors in your assessment?

- Let's say you used the color green for the people you would rate as **Well Above Average** (8, 9, or 10) team members. Find ways to reward and recognize their contributions, performance, and attitude. Continue training and coaching them for future success.
- For the people you rated as red or **Average** (4, 5, 6, or 7) team members, you need to address issues immediately. In your mind, these people are worth the effort and you anticipate that they will be able to make the improvements necessary to fit into and bring value to the team. Find ways to reward and recognize the specific things they are doing well. Establish an action plan for how you will address shortcomings. Continue to train and coach them for performance improvement.

- Any individuals you rated as brown or **Below Average** (1, 2, or 3) likely need to be de-hired. If you know now that they are a drain on your financial resources, your time, your physical and mental energy (“energy vampires”), your team’s healthy dynamic, and your precious relationships with your clients, you need to take action. It’s not personal. It’s business. Take action to protect and ensure the health of your business.

### TRUTH

**People often hire employees too quickly and hold on to them way too long when things aren’t working out.**

Don’t be afraid to get out of business relationships with people on your team who are not contributing as you need them to. If you have treated them fairly and professionally and you continue to do so when you have the honest conversation about their future on the team, you are not being cruel or callous, and you should not feel guilty. It’s not personal. It’s business.

*When you have loaded up your organization with Talent,  
your life will never be the same!*

# Focus on Doing the Right Things

*noun/thing:* \le ver age \ 'le-və-rij, 'lē-; 'lev-rij, 'lēv-

In the world of finance, *leverage* means using given resources in such a way that the potential outcome is magnified.

## LEVERAGE

In physics, *leverage* means applying a lever to multiply a force to gain advantage.

In the world of real estate sales, *leverage* means the Who, How, and What that will help you take your business to the next level.

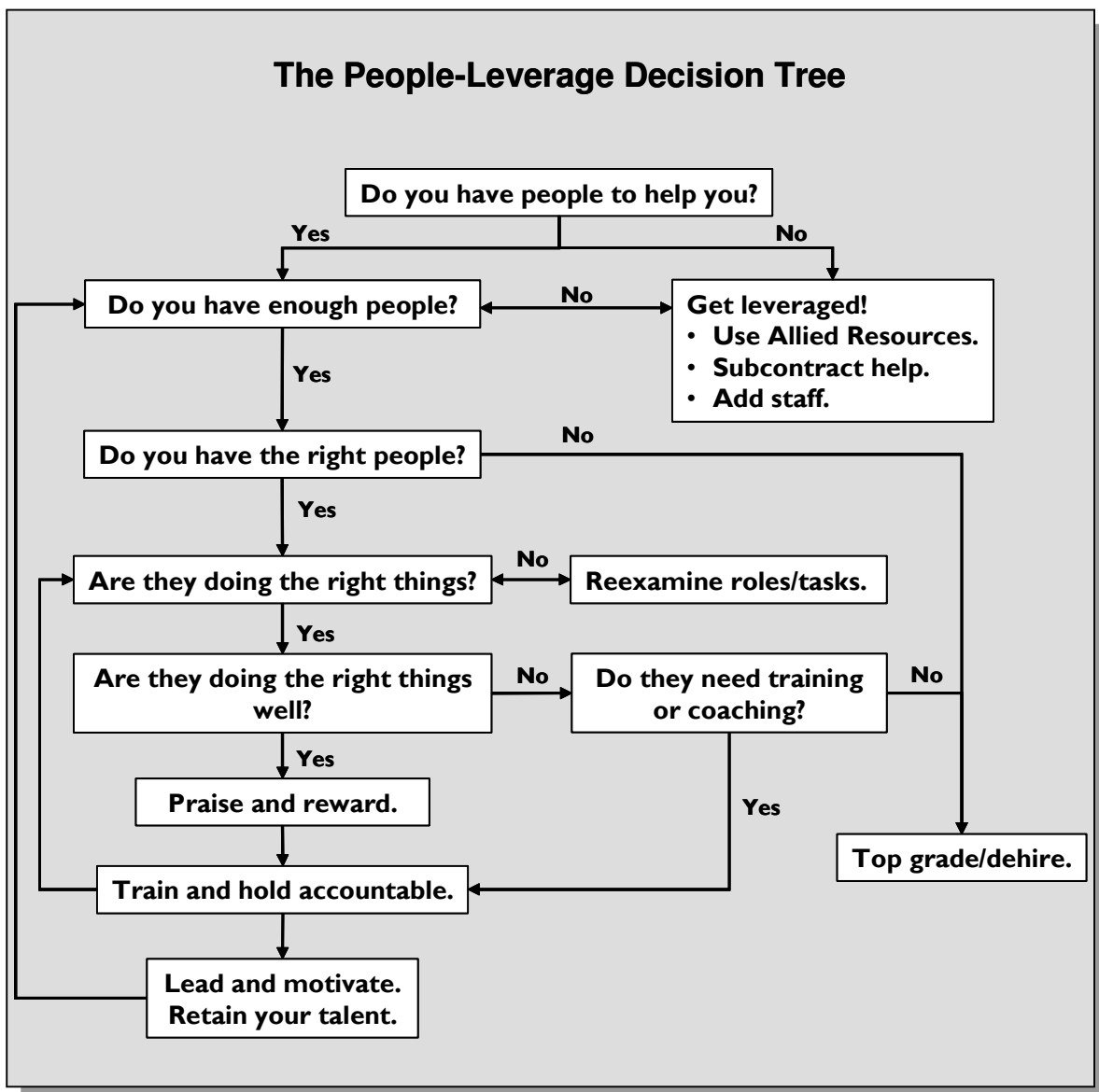
Leverage is about getting help, doing more, working smarter. Make sure your people leverage are really adding *leverage* to your business! That is, make sure your people are helping you to:

- Magnify your potential outcome
- Multiply a force [action] to gain advantage
- Take your business to the next level



# Are Your People Doing the Right Things?

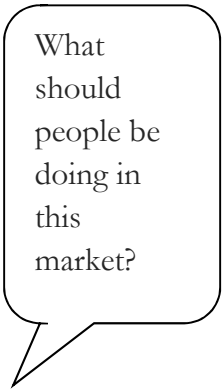
Let's revisit the People-Leverage Decision Tree a final time. You've got people leverage—Allied Resources, subcontractors, and/or employees. You've assessed your team and ensured that you have the right people. (Remember, the *wrong* people can never do the *right* things.) Now, you need to ask the next critical question: Are your people doing the right things?



## The Right Tactics for a Tough Times

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When sales drop, everyone must be more effective. Everyone must be on their game. What things should your people be doing to help the team succeed in a challenging market? In addition to the information that you're gathering from this guide to Effective People Leverage, check out KWU's other SHIFT Tactics to learn what you can implement immediately in a shifting market.




What  
should  
people be  
doing in  
this  
market?

To stay at the same level of production in a shifted market, you must double your efforts. Monitor your team's numbers weekly. Have a weekly meeting to review results. Provide them with scripts, and role-play every day.

## Reexamine Roles and Tasks

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Rebekah Rivers found that, during the last major national market shift, her listing specialists were having to work extra hard because their listing inventory had gone up so much. She says, “We really had to tweak our marketing plan to make sure that it was really effective and that we weren’t just doing stuff because that’s what we were doing. Everybody was a little overworked and we needed to work smarter.”



Are your people doing the right things?

Bruce Hardie adopted a strategy that made his team more nimble in shifting markets. “Rather than having job descriptions,” says Bruce, “we have job tasks. We can move tasks from different people to different people as needed. We might even be able to eliminate a staff position and farm those tasks out to others on the team.”

In non-shifted markets, you may have had the transaction volume and profit to support multiple specialized roles. For example, you may have employed a coordinator to prepare buyer and listing packets. In a slower market, you may be able to reduce head count by reassigning these tasks to your buyer and listing specialists.

Having the flexibility to move tasks from one individual’s workload to another—possibly crossing the lines of more formal job descriptions—is critical for teams operating in a shifting market.

## Always Provide Outstanding Customer Service

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Be careful. Remember that working smarter does not mean cutting corners that compromise the level of service you provide your clients.

During a fast-paced seller’s market, some agents were able to get away with offering very little in terms of customer service. In some cases, houses sold so quickly that sellers were barely able to recall whether they had received good or bad service from their listing agent. All they knew is that the home sold and they were happy. In a shifted market where things have slowed down and homes are sitting for three, six, nine months or longer, the level of customer service an agent provides can be a differentiating factor.

## Are YOU Doing the Right Things? Get Back into the Game!

Martin Bouma had found that, in the shifted market that began in late 2006, his time was well-spent assisting his sellers through all phases of the transaction. When at one time he would have just shown up at the closing, Martin stepped back in to assist his sellers from contact to close. By his estimation, 95 percent of their property inspections forced a renegotiation, and his skills were required to support them through this process.

### NEW STRATEGY

**Quit passing out leads. Start passing out appointments.**

In a shifted market, your focus should be on lead generation. Lead Generation 36:12:3 teaches us that a commitment to the discipline of lead generation for 3 hours a day is a commitment to the single most important business outcome and number one priority for any real estate agent: the generation of an ongoing supply of quality buyer and seller leads.

But, a lead sits as a lead—a name in your database—until you *convert* it to active business!

Many Mega Agents made another very significant change to their business operations during the last major marketplace shift: They stepped back in to work **lead conversion**. Many Mega Agents from the top teams in Keller Williams Realty found that reengaging in the business and bringing their personal conversion rates into play was the fastest way to reclaim lost ground. Most felt, “If I can just get to the seller/buyer, I can lock them in every time.” Name recognition, reputation, experience, raw sales talent, time-tested scripts, an existing relationship—these are some of the factors that lead to the Mega Agent’s superior conversion rates.

Looking specifically at the buyer's side of the business, some Mega Agents saw that their buyer's agents were struggling to effectively convert new buyer leads and that the challenge was negatively affecting their work with current buyer clients. However, when the buyer's agents receive *appointments* versus names of leads, they had phenomenal success—and success within their behavioral gift zones.

*"Many top agents generate leads, pass the leads out, and then expect a high conversion to appointments. What they soon discover is that one of the reasons they were personally successful is that they were so phenomenal at lead conversion to appointment. When they simply passed out leads to individuals with less skill and no accountability, the conversion rates dropped horribly."*

Gary Keller

Examine your team structure and determine if you yourself, a Lead Coordinator, a Lead Buyer Specialist, or someone else should serve in an inside sales capacity, qualifying and converting buyer leads and handing off appointments to buyer's agents.

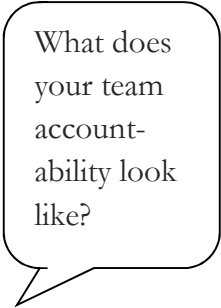
If you make such a change to your team's roles, you likely also need to revisit what you are offering your buyer's agents as a commission split. A 30 percent split is appropriate, given that the leads have already been qualified and set as appointments by the time they reach the buyer's agent for follow-through. This may initially sound like an unattractive proposition for buyer's agents, but when they receive set appointments with motivated buyers, they are likely able to be more productive, carry more clients, close more transactions, and take home more pay. A win for all.

## Train and Coach Your People to Do the Right Things Well

Once you have confirmed that you have the right people on your team and that they are doing the right things, your next goal is to ensure they are doing these things *well*—to your standards and expectations and beyond.

This is the time to be a great leader-coach (someone who is on the field with the agents, calling the plays) vs. a leader-boss. A leader-coach runs the drills and holds the agents accountable.”

Mega Agent Martin Bouma describes his accountability process during the last major market shift:



What does your team accountability look like?

“I met with my team last week and said, ‘Okay, team, we’re off track on our goals for the month. What do you have, Julie? What do you have, Scott? We’ve got to get another \$55,000 up on that board to hit our goal for the month. What are we going to do to get that done?’ So everyone really gets into it. ‘Okay, let’s get ten price reductions. Kristal is going to do this.’ You know what I’m saying? It’s amazing. When you really let your team know where you are every moment of the day, you know exactly what goal you have to hit. That’s team accountability.”

Again, remember that your team includes people outside of your roster of employees. Train them on your systems and to your standards. Include vendors, colleagues, family, and friends in training and coaching sessions. Communicate with them regularly. Take action when expectations are not met or standards are not kept.

## Empower Your People

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*"We have discovered that over time talent will not need to be micromanaged. Trained, yes. Consulted, yes. Micromanaged, no."*

The Millionaire Real Estate Agent

Are you having to micromanage your staff members three to six months after hiring them? You may not have hired the talent you need or they may not be motivated to reach the goals you have agreed upon. Or you may need to monitor your own management tactics. Are you letting your talent exceed your goals and expectations without your interfering micromanagement?

Experience the highest possible success through people by practicing these ten principles for empowering people (from *The Millionaire Real Estate Agent*).

### Ten Principles for Empowering People

1. Tell people what their responsibilities are. Get agreement.
2. Give them authority equal to their assigned responsibilities.
3. Set standards of excellence and guidelines.
4. Provide initial and ongoing training that will enable them to meet standards (skills, knowledge, etc.)
5. Hold them accountable. Define consequences.
6. Provide them with weekly feedback on their performance.
7. Recognize them for their achievements (praise in public; correct in private).
8. Trust them. Allow them to grow into self-leadership.
9. Give them permission to fail.
10. Treat them with dignity and respect.

## A Word about Systems and Tools



### Sharing your agent-branded KW App?

1. Get the Keller Williams Real Estate app from Apple App Store or Google Play Store.
2. In the app, use “Agent Search” to find and select your name.
3. Toggle “Make this my agent” button to “Yes”
4. Use “Share App” to share with your contacts!

Find More on  
KWConnect.com

*“Systems are simply the repeatable processes that allow us to duplicate magnificent results easily.”*

The Millionaire Real Estate Agent

The focus of this SHIFT Tactic is on Effective People Leverage. However, people are often most effective and efficient in their jobs when they take advantage of the leverage that is possible through systems and tools. Systems are *how* you get the job done. Systems can be as complex as the coordination of seamless transitions between team members and vendors through the contract-to-close process or as simple as a checklist of items to go into a prelisting packet. Systems are defined by your standards, they document your specific methods, and they are repeatable by others. Those are the keys.

Tools are *what* you use to get a job done and can range from full-functionality contact management software, to PDAs, to script cards, to IVR software, and so forth.

#### TIP

The Millionaire Real Estate Agent cautions us that “designing and implementing systems takes more time than you think and very specific skills. For most real estate agents, trying to put multiple systems in place by yourself will actually reduce productivity.” Contract with or hire administrative help and get them to start creating systems and adding productivity tools to your business.

### Technology

The ultimate goal in adding technology to your business is to set a higher standard of production for yourself and your staff. And given that your focus should be on lead generation, lead conversion, listings, and sales, the technology that you use should either support these specific tasks OR help reduce the administrative burden of your business that takes time away from those crucial activities.

Look for technology to assist you with the following:



- Listing presentations (PowerPoint, website metrics for featured properties)
- Database management (contact management software)
- Marketing (eMarketing, prefabricated fliers, eCards)
- Lead generation (websites and social media)
- Customer relations (email newsletters)
- Contract management (computerized form filing)
- Transaction management (Contract-to-close management)
- Budgeting (accounting software, mortgage calculators)
- Scanning and printing
- Photography and photo editing



### Maximize Profit with KW ProfitDash App

- Integrated with KW systems to track your real-time GCI and Commission Pipeline.



### Are you effectively leveraging systems and tools?

As you assess the strength of your people, ask yourself if systems and tools are needed to take them to the next level. Your administrative team should be identifying these needs for you and helping to recommend or implement solutions.

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- Tracks mileage and deductions automatically and calculates taxes for you.

- Sync expenses **automatically** with your business credit card or enter them **manually**.

- Provides your business' *True Profit!*

Download KW ProfitDash from Apple App Store or Google Play Store.

# The Bottom Line

You have likely heard of the 80/20 Principle—the classic Keller Williams rally call to get focused on what matters in your life and your business. In a book of the same name, Richard Koch explains that, while studying patterns of wealth and income in nineteenth-century England, Italian economist Vilfredo Pareto (1848–1923) discovered the pattern commonly referred to as “the 80/20 Principle.” This principle states that predictably 80 percent of our results will come from 20 percent of our actions. **The key is to focus on our most important 20 percent.** When we are focused on the 80 percent that doesn’t matter, we tend to get only 20 percent of the results we want.

In the KWU course Lead Generation 36:12:3, Gary further emphasizes the importance of this principle by calling it “The Principle of Greatest Leverage.”

## The Principle of Greatest Leverage

**When your goal is mastery and success, you can leverage your time to yield the highest productivity if you spend your time strategically focused on only a few key actions.**

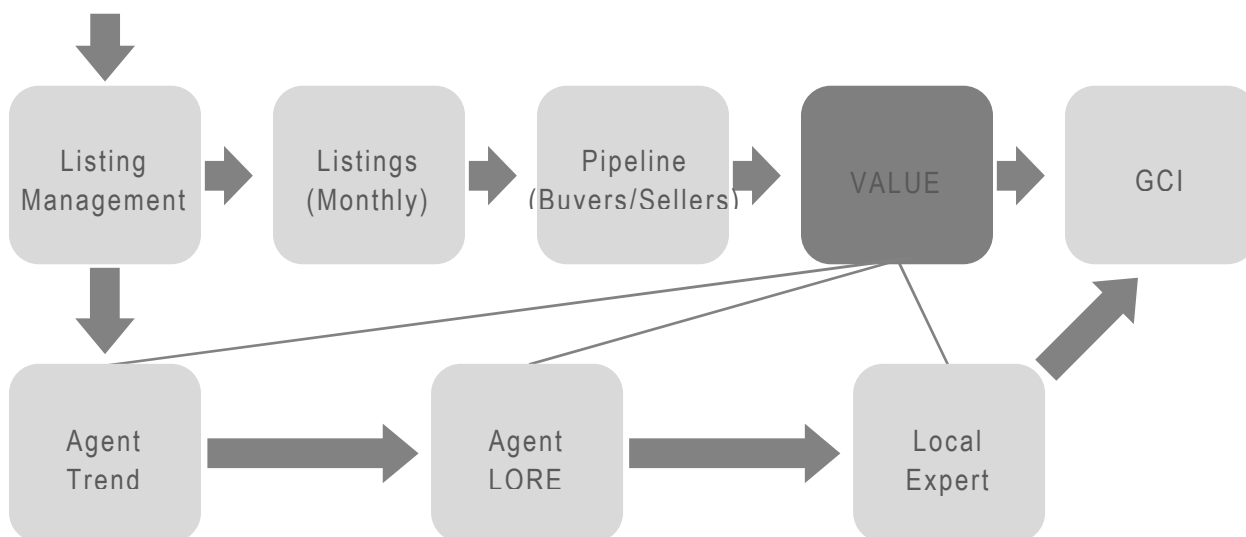
To achieve mastery and success in your career and life, you must adopt a laser focus on your 20 percent. In your real estate sales career, that is Leads, Listings, and Leverage.

This SHIFT Tactic has delivered to you a perspective and a plan for how to bring great people leverage into your life and hold them accountable to maximizing their own potential and taking your business to the next level.

*Are you ready to take action?*

## Career Growth Initiative Power Tools:

The tools of the Career Growth Initiative are a synergistic system that fuel the Four Conversations with evidence.



### Vision Tools

- **Listing Management:** A yearly plan for profitability through growth in market share.
- **Listings (Monthly):** Monthly tracking with adjustments to help you achieve your yearly goal.
- **Pipeline (Buyers/Sellers):** Identify on a daily basis whether your activities will turn your goals into reality.

### Value and Validity Tools

- **Agent Trend:** Report that tracks your growth in market share and critical levers in your business to assess performance and opportunities.
- **Agent Language of Real Estate (LORE):** Provides evidence of your value by comparing the growth of your business to that of your board, your subdivision, your Market Center, your Region, etc.
- **Local Expert:** The story of your expertise to underscore your validity to clients.

### Thriving Tools

- **GCI:** Track your GCI against your expenses to identify your Break-even Day.

## The Wall of Value

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When you are able to quantify and communicate the benefits of the value you deliver, you will create a **Wall of Value** in your business that attracts listings and creates closings.



### Communicate Value

Look for ways to share your Wall of Value to grow your business:

- Listing and Pre-Listing Presentations
- Buyer Consultations
- Marketing materials
- Conversations with allied resources

**For more, go to the Career Growth Initiative page on [KWConnect.com](https://www.kwconnect.com)**

# My Action Plan

Don't put away this training guide without developing a plan to put what you have learned into action! Review the key "challenges" listed below and assess your current ability to meet each challenge on a scale of 1–5.

1 = "I have no experience with this."

2 = "I am not very good at this."

3 = "I am pretty good at this."

4 = "I am confident with this."

5 = "I am an expert at this."

For any rating of 3 or below, write down the action steps you will take to increase your understanding, build your skills, develop your confidence, see greater results, and take home more money!

Challenge	Rating	Action Steps
1. Looking at my "team," it is obvious that I understand that people are the most powerful form of leverage for my business.		
2. I know how to evaluate <i>when</i> it is time to add more people leverage.		
3. I have assessed which activities are most dollar productive for my business and which activities bring me joy.		
4. I have Allied Resources on my team.		

Challenge	Rating	Action Steps
5. I regularly ask my Allied Resources how they might be able to help me.		
6. I communicate my expectations and standards to my Allied		
7. I am ready, willing, and able to add people leverage by subcontracting specific business and personal tasks.		
8. I know where to look for talented subcontract labor.		
9. I communicate my expectations and standards to my subcontractors.		
10. I “lead with revenue,” and I am ready, willing, and able to hire people onto my team.		
11. I have attended KWU’s Career Visioning course to learn the formal process for finding and hiring top talent.		

Challenge	Rating	Action Steps
12. When assessing potential people leverage, I can spot the difference between talent and non-talent.		
13. I have read <i>The Millionaire Real Estate Agent</i> and I understand the Path to a 7 <sup>th</sup> Level Business.		
14. For my first hire, I found great administrative help.		
15. I do not violate the order of the questions on the People-Leverage Decision Tree. I understand the importance of determining if I have the <i>right people</i> , before determining if they are doing the <i>right things</i> .		
16. My people possess the essential attributes of talent (strong work ethic, resilient attitude, trainability, willingness to follow systems).		
17. I have a plan for how to get from here to there—by assessing what I want, who I have, and who I would replace.		

Challenge	Rating	Action Steps
18. I have performed a critical assessment of my team and ranked the value of each member on a scale of 1-10.		
19. My people are all a behavioral fit for the roles they are in on my team.		
20. I am not attempting to train and coach a <i>wrong person</i> into doing the <i>right things</i> .		
21. I am prepared to top grade (dehire) someone if they are not right for my team.		
22. My people are doing the right things for this market.		
23. I have a plan to adjust job roles and tasks (if needed).		
24. I hold my entire team (Allied Resources, subcontractors, and employees) accountable to providing outstanding customer service.		
25. I am personally doing what I need to be doing to ensure the success of the business.		



Challenge	Rating	Action Steps
26. I am holding my team accountable to meeting my standards and expectations.		
27. I am providing or encouraging training that will support my team's development.		
28. My team and I are leveraging systems and tools to increase productivity and profitability.		
29. I am spending my time on my 20 percent: Leads, Listings, and Leverage.		
30. I have set goals for next year for number of transactions, etc. in the CGI Calculator with my MC leaders.		
31. I understand how to bring great people leverage into my life to change my business and personal life forever.		

## From Aha's to Achievement

### AHA's

*What are your Aha's?*

### BEHAVIORS

*What behaviors do you intend to change?*

### TOOLS

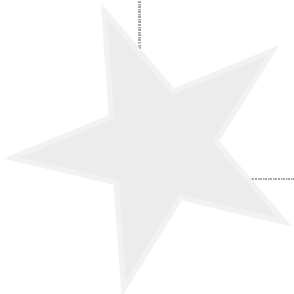
*What tools will you use?*

### ACCOUNTABILITY

*What does accountability for this look like?*

### ACHIEVEMENT

*What will you achieve?*



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