

# The Elite Agent Partnership Guide

*Discover How We Can Collaborate  
Our Real Estate Skills*

CONTRACT

## The Real Yasherica

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**Dear Agent,**

Cheers to a new friendship, partnership, and business relationship! I am pleased that you have found me and my real estate services. As a real estate agent, you juggle market trends, client expectations, and the ever-evolving demands of the industry—all while building your brand and closing deals. I understand the dedication, strategy, and resilience it takes to thrive in this business, and that's exactly why this partnership is designed to support and elevate your success.

I know firsthand what it takes to be a successful real estate agent. My passion for this industry started when I was just 12 years old, and over the years, that passion has driven me to study, research, and sharpen my skills. I earned my real estate license in 2021, and after three years of working as an active agent, I made the transition from being in the field to becoming a real estate matchmaker—focusing on referral-based connections. In 2025, I launched my referral business to help agents connect with motivated clients, making transactions smoother and more efficient. With a background in marketing, negotiation, business communication, and data analysis—along with a strong understanding of psychology and technology—I provide personalized, strategic support to help agents like you succeed. My goal is to bring clients and agents together in a way that maximizes success for both parties through innovation, collaboration, and excellence.

As a partner of yours, I not only bring you clients, but I also offer support to both you and our client within the transaction. I have 3 different services to choose from, each being of great benefit. I have brought together real estate and market research analysis. You get to choose which service you want, which will dictate what the referral fee will be.

You will find more information about my services, plus helpful tips and tools for agents included in this agent packet. This isn't just about me working with some of the best agents. I provide assistance for you to become one of the best agents.

Check out my websites, social media accounts, or contact me directly to get more information on me and my services. I look forward to nurturing our new friendship, partnership, and business relationship!

Kind regards,

Yasherica Goodin

## How This Works: Steps of Services (S.O.S)

Helping Your Real Estate Business, One Step at a Time

STEP	OFFER	SERVICE
<b>Contacting</b>	<ul style="list-style-type: none"> <li>- A return of contact (phone, email, text, social media, website)</li> <li>- To start or schedule a free consultation of networking (phone or video chat)</li> </ul>	I reply to your initial outreach of being connected to ready, willing, and able clients.
<b>Consultation</b>	<ul style="list-style-type: none"> <li>- A brief introduction of my services and your business</li> <li>- To collect info: type of clients being sought, area of expertise, any goals</li> </ul>	We will have a brief introduction to discuss both of our real estate services.
<b>Preparing</b>	<ul style="list-style-type: none"> <li>- To investigate agent info myself</li> <li>- To research qualifications, transaction history, local market expertise</li> </ul>	I gather and organize information about you, your services, and your business.
<b>Evaluation</b>	<ul style="list-style-type: none"> <li>- Review my investigation findings</li> <li>- A questionnaire of your goals, strength, and specific skills</li> </ul>	We go into detail about the information you want used in your marketing promotions.
<b>Researching</b>	<ul style="list-style-type: none"> <li>- To begin searching for potential clients through promoting you</li> <li>- Utilizing my market research analysis and tech savvy skills</li> </ul>	I analyze the client's needs and screen potential matches to ensure they align with your expertise and communication style.
<b>Recommendations</b>	<ul style="list-style-type: none"> <li>- Screen potential clients for you</li> <li>- Provide a completed questionnaire with client goals</li> </ul>	We examine potential client profiles to see if they align with your qualifications and market strengths.
<b>Connecting</b>	<ul style="list-style-type: none"> <li>- Arrange a group meeting of me, you and the selected client (call, text, video chat)</li> <li>- Offer my help and assistance to both client &amp; agent</li> </ul>	I facilitate introductions between you and the client, ensuring a smooth and professional start to your collaboration.
<b>Progression</b>	<ul style="list-style-type: none"> <li>- Make sure your client understand what's to come and how we can help</li> <li>- Collaborate to address client concerns</li> </ul>	We work together to outline the next steps and create a clear plan to meet the client's real estate needs while maintaining open communication.
<b>Monitoring</b>	<ul style="list-style-type: none"> <li>- Regular check-ins to track progress within the real estate journey</li> <li>- Help you with chosen service</li> </ul>	I check in with you regularly to ensure the process is progressing smoothly and provide support as needed.
<b>Completion</b>	<ul style="list-style-type: none"> <li>- Celebration of closing a deal together</li> <li>- Continue to network and collaborate</li> </ul>	We finalize the referral process, celebrating a successful match, and discuss opportunities for future collaborations.

## Agent Services: Plans of Purpose (P.O.P)

I Bring the Clients, You Get the Support

Plans	Offers	Purpose
<p><b>Market (35%): Advanced Service</b></p>	<p>~ Market homes and/or area</p> <p>~ Home/listings includes creating and sharing social media post, property brochures, flyers for open houses, single-property website, email newsletters, postcards for just listed or just sold, social media graphics, infographics, feature sheets, door hangers</p> <p>~ Areas/attractions includes flyers, brochures, and guides for communities, local business directories, events, park &amp; recreation, tourist attraction, local school districts, shopping and dining, cultural and arts, real estate market trends, health and wellness</p>	<p>A combination of my marketing, researching, and analyzing service in order to sell the home and/or the area this real estate journey is taking place.</p>
<p><b>Research (30%): Intermediate Service</b></p>	<p>~ Research local amenities &amp; professionals</p> <p>~ Lifestyle amenities include spots for food &amp; drink, things to do, shopping, and services</p> <p>~ Process professionals includes fields in financial &amp; legal, home services, marketing &amp; digital, moving &amp; relocation, business &amp; networking, and real estate development &amp; investment</p>	<p>In addition to the analysis service, I offer research so that both you and our client have what's needed for this real estate process.</p>
<p><b>Analysis (25%): Beginner Service</b></p>	<p>~ Analyze client's readiness &amp; needs</p> <p>~ Readiness includes client's budget, financial readiness, motivation, communication preferences, and timing expectations</p> <p>~ Needs includes client's property type, location factors, home features, experience, lifestyle factors, and long-term goals</p>	<p>I analyze ready, willing, and able clients so you can know exactly what type of transaction you're getting into and how you can help.</p>

## Agent Referral Fees & Golden Services

For my fellow agents, I am offering more than just simple referrals, but partnering services as well. I begin the analyzing and screening process on clients and when they are ready to move out, I partner with on the field experts like you, where I can help with things like marketing and researching. Here's a list of my golden services:

- **MARKET Plan (35%)**
  - **Homes & Listings:**
    - **Social Media Marketing:** listing agent post shares, social media graphics, infographics
    - **Print Marketing:** property brochures, flyers for open houses, postcards for just listed/just sold, door hangers
    - **Digital Marketing:** single-property websites, email newsletters, PDF downloads
    - **Property Highlights:** feature sheets, room highlights, upgrade & renovation lists
  - **Areas & Attractions:**
    - **Flyers:** Event Flyers, Local School District Flyers, Real Estate Market Trends Flyers
    - **Guides:** Parks and Recreation Guides, Local Shopping and Dining Guides, Cultural and Arts Guides
    - **Brochures:** Community Brochures, Tourist Attraction Brochures, Health and Wellness Brochures
    - **Extras:** Listing agent post shares (social media), Local Business Directories
- **RESEARCH Plan (30%)**
  - **Lifestyle Amenities:**
    - **Food & Drink-** restaurants, bars, coffee, brunch, dessert, takeout, delivery
    - **Things to do-** parks, gyms, art, attractions, nightlife, live music, movies, museums, libraries
    - **Shopping-** groceries, beauty supplies, car dealers, home & garden, apparel, shopping centers, electronics, sporting goods, convenience stores
    - **Services-** hotels, ATMs, beauty salons, car rental, car repair, car wash, dry cleaning, charging stations, gas, hospital & clinics, mail & shipping, parking, pharmacies
  - **Process Professionals:**
    - **Financial & Legal Professionals-** mortgage brokers/loan officers, real estate attorneys, accountants/tax advisors, financial planners,

title companies/title agents, escrow officers, insurance agents (homeowners & title insurance)

- **Home Services Professionals-** home inspectors, appraisers, general contractors, handymen, property managers, landscapers, cleaning services, interior designers/stagers, pest control experts
- **Marketing & Digital Professionals-** photographers (real estate), videographers/drone operators, graphic designers, social media managers, SEO specialists, content writers, digital marketing experts
- **Moving & Relocation Services-** moving companies, storage facility providers, relocation specialists
- **Specialty Service Providers-** surveyors, energy auditors, environmental consultants, property inspectors (specialty)
- **Business & Networking Professionals-** real estate coaches/trainers, business consultants, networking event coordinators
- **Real Estate Development & Investment Professionals-** real estate developers, real estate investors, architects, land use planners

○ **ANALYZE Plan (25%)**

■ **Client Readiness:**

- **Budget-** financial brackets & purchasing power
- **Financial Readiness-** pre-approval status and down payment readiness
- **Motivation-** job relocation, family growth, or investment
- **Communication Preferences-** call, text, email
- **Timing Expectations-** urgency of buying/selling/renting

■ **Client Needs:**

- **Property Type-** single-family home, condos, townhouses
- **Location Factors-** proximity to work, schools, amenities
- **Home Features-** number of bedrooms, outdoor space, modern kitchens
- **Experience-** first-time homebuyer or seasoned investors
- **Lifestyle Factors-** family size, work from home needs (office space), hobbies
- **Long-Term Goals-** forever home, rental portfolio, downsizing

# Emergency Guide

# Money Saving Tips



The National Association of REALTORS® and Center for REALTOR® Financial Wellness are here for you with information and resources to help you get through challenging times. For even more tips and information, visit [FinancialWellness.realtor](https://FinancialWellness.realtor) today!



## HAVE AN EMERGENCY FUND

Most economists suggest putting aside 3-6 months of living expenses. Even for those with healthy reserves, monitor your investment accounts and continue to save.



## TRACK YOUR SPENDING

Consider cutting back on non-critical spending, and keeping those cost savings in place for a while to help build up your reserves. Make consistent, timely payments to help maintain a good credit score. Visit [FinancialWellness.realtor](https://FinancialWellness.realtor) for a FREE monthly budget spreadsheet.



## KEEP SOME CASH ON HAND

It's a good idea to have a couple hundred dollars in cash for an unexpected emergency. Having some cash on hand can ease transaction problems in the event certain businesses are disrupted.



## TAKE FINANCIAL INVENTORY

Locate key financial documents to keep accurate records, and have more than one copy. Examples: estate-planning files, bank information, brokerage and retirement accounts, as well as insurance policies, mortgage information, business records, and more.



## RESEARCH INSURANCE POLICIES

Consider working with your current provider on reducing your insurance payments. If your payment can't be lowered, don't hesitate to shop around for new rates to help lower your current monthly expenses.



## REVIEW AND UPDATE PERSONAL RECORDS

Compile a list of important contacts, such as your insurance agent, accountant, attorney, doctors, and veterinarians. Review the list and make sure their phone number and email address is up to date.

# Emergency Guide

# Tips for Well-Being

Finances are obviously an important part of everyone's life, but don't forget to take care of your physical and psychological self too. Getting in financial shape is much easier if you are in good health, mentally sharp and confident in the security of your loved ones.



## PHYSICAL WELLNESS

- Consider investing in a humidifier. Medical experts say it helps reduce the transmission of airborne viruses.
- Drink lots of water and fluids, and load up on healthy, nutrient rich meals.
- Contact your doctor and pharmacy to ensure you have at least a 30-day supply of your prescription medicines.
- Create a contingency plan if you or a loved one gets ill.
- Consider setting up a "sick room" in your house if anyone you live with becomes sick with any contagious virus.
- Ensure you and your loved ones have completed a healthcare proxy form in advance of any illness.
- Have fever reducers, cough medicine, and sanitary wipes on hand.
- Have a copy of your medical records ready to supply if needed.



## MENTAL HEALTH

- Keep informed of important news updates, but resist the urge to watch a high volume of negative news coverage.
- Be mindful of negative social media posts that don't contain useful information or have not been endorsed by a reliable source.
- If your circumstances allow for it, safely get outside each day to breathe in fresh air and exercise.
- Keep in contact with loved ones or a friend on a weekly basis. Use phone or video chat if needed.
- If you are a person of faith, practice it.



## LIFE & COMMUNITY

- Set up Skype, Facebook Messenger, or Google hangouts to socialize with your friends and loved ones.
- Use your Outlook or Google calendar to set reminders for yourself related to personal goals you still wish to achieve. Create a schedule and regularly check-in with friends, family and colleagues.
- Follow a positive regiment each day to keep your mind busy, your body moving, and your spirits up.
- Put together a list of projects you want to complete – make sure some of them are fun! – and start giving yourself timelines and goals for the week.
- Find something kind to do or say to others, daily. Consider volunteering in your community.

# Emergency Guide

# Checklist & Tips

During any challenging time, it's important to take stock of what's most important in your life. Set priorities and establish reasonable goals. There are organizations and agencies that can help. Be proactive, stay educated and positive, and look forward to a bright future!



## FACING CHALLENGES

- If needed, reach out to your mortgage company or landlord to ask for a deferment.
- If you are having trouble communicating with your landlord or mortgage lender, reach out to a HUD housing counselor for assistance.
- If needed, reach out to all creditors (credit cards, auto loan, medical payments, student loans, etc.) and request a deferment.
- If you aren't making progress with your lenders, be persistent. If lenders are charging you additional fees, negotiate.
- If needed, reach out to your utilities and other ongoing payments (auto insurance, property taxes, homeowners insurance, condo association, cable, internet, water, heat) and delay your payments, when possible.
- If you are in need physically or emotionally, seek guidance from a medical professional. Don't forget to inform those closest to you.



## RESOURCES & BENEFITS

- Research funds that may be available to you based on your employment status.
- Your local community, county, or state may have additional financial resources available to you. Visit your local government websites and set up Google alerts to be notified as information is provided.
- If you do not need deferments on your loans, continually pay to reduce your interest later and keep your loan term on track. Consider setting up payment reminders through your bank or enroll in automatic payments.



## NEXT STEPS

- Put your best foot forward and be optimistic! Challenging times may be difficult to manage, but focus more on the positive versus the negative.
- Don't overspend on stockpiling goods. Follow the CDC's recommendations for getting ready, and think about what you want to have on hand for a couple of weeks if you get sick (like herbal tea, Kleenex, cough drops, cleaning supplies).
- Consider doing a thorough cleaning of your home. Keep it clean by limiting or eliminating visitors and sanitizing common areas like the microwave and bathroom.
- Check in with family members who may not be able to leave the house.
- Take time to educate yourself to be better prepared for future emergencies.

## NAR MEMBER RESOURCE: DOS AND DON'TS WHEN WORKING WITH BUYERS

***The practice changes required by NAR's settlement must be implemented in good faith. NAR opposes any attempt to circumvent the practice changes.***

This resource will help you implement the practice changes and empower you to transact business consistent with the settlement, your ethical duties, and in the best interest of consumers. It is meant to provide clarity about business practices allowed under the settlement, as well as those that are not permitted. NAR members should not engage in the practices that are “don'ts” in this guide.

The consequences for failing to abide by the terms of the proposed settlement may be severe—including losing your released status under the settlement and losing NAR membership. Regardless of your NAR membership status, if you fail to abide by the terms of the settlement, you can lose MLS access or even face possible legal liability.

Below are important dos and don'ts to observe when working with buyers. Please continue to follow [facts.realtor](https://facts.realtor) for the most up-to-date dos and don'ts and all updates on how to navigate the settlement and practice changes, as well as for resources to help you continue to deliver value to and assist homebuyers and sellers on the homeownership journey.

### DOS WHEN WORKING WITH A BUYER

- ✔ **Clearly and frequently demonstrate your value.**
  - At the outset of the relationship, communicate your unique expertise and experience and explain that one of the core reasons to use a REALTOR®, instead of just a real estate licensee, is that REALTORS® are required to act in the client's best interest under the REALTOR® Code of Ethics.
  - Your value includes working to find the buyer a home that meets their distinctive needs. Consider sharing [this guide](#) about “REALTORS®' Duty to Put Clients' Interests Above Their Own” with your buyer.
  
- ✔ **Explain what a written buyer agreement is and why the buyer is being asked to sign it.**
  - Explain that this is an agreement outlining the services the agent will provide and what they will be paid for those services.
  - Explain that the purpose is to ensure buyers are directly involved in the negotiations of the amount their broker is paid.
  - Inform the buyer that obtaining this agreement is a requirement that most MLSs put in place for participating real estate professionals. (Note that it could also be a state law requirement—consult your state and local laws.)
  - Be clear that you must have an agreement in place before touring a home with the buyer, and that they should only sign an agreement both the buyer and their agent are comfortable with.
  - See [here](#) for a helpful guide on written buyer agreements to share with your buyer.

- ✔ **Before signing the buyer agreement, be transparent about the realities of compensation and potential costs.**
  - Inform the buyer that they can request compensation for their agent from the seller or the seller's agent, but not all sellers or seller's agents may choose to pay buyer broker compensation.
  - Ensure the buyer understands their responsibility for any agreed upon compensation.
  - Inform the buyer that under current FHA rules, agent compensation cannot be financed through a mortgage.
  
- ✔ **Ensure your buyer understands all options, and advocate for the terms of the offer your buyer needs.**
  - REALTORS® have an ethical and fiduciary duty to serve the best interests of their clients.
  - The settlement explicitly preserves offers of compensation as a choice for consumers because it can mutually benefit buyers and sellers.
  - You can inquire about the existence of such offers and communicate the response to your buyer.
  - Additionally, even if a seller or their broker is not offering compensation, your buyer can choose to ask the seller to cover the buyer broker cost in the buyer's offer.
  
- ✔ **Know and follow state and local laws.**
  - There may be additional requirements, including those for certain types of agent representation, based on state law and local practice.

## DON'TS WHEN WORKING WITH A BUYER

- ✘ **Don't misrepresent anything to a buyer, including the nature and purpose of the written buyer agreement.**
  - Written buyer agreements outline the services the agent will provide and what they will be paid for those services. The purpose and reason for these agreements must be accurately explained and presented to a consumer so that they can make an informed decision on how to proceed.
  - The [Code of Ethics](#) requires honest and truthful communications and representations (Article 12); to always protect and promote the interests of their client, and to treat all parties honestly (Article 1); and that all agreements related to a real estate transaction be clear and understandable (Article 9).
  - While some states legally require buyer agreements, many MLSs now require a written buyer agreement as a result of the NAR settlement and related practice changes, not a new law. Make sure your explanation of the requirement is accurate.
  
- ✘ **Don't attempt to "work around" the practice change requirements.**
  - When you agree with a buyer to certain work for a particular amount of compensation, you must do so in good faith.
  - Any compensation agreed to in the written buyer agreement must be "objectively ascertainable" under the settlement—this means compensation must be clearly defined (e.g., \$0, X flat fee, X percent, X hourly rate) and not open-ended.
  - Do not enter into agreements created to get around this requirement. For example, you should not enter into multiple agreements with a buyer at one

time for the same services or define compensation as whatever the seller or seller agent is offering as compensation.

- Potential amendments should be considered in the same light—you should not amend an agreement for the sole purpose of “matching” an offer of compensation that is greater than what you and your buyer agreed to. Any amendment must have a legal basis and a fully informed buyer that agrees to amend. Consult state contract law.
- Remember, the written buyer agreement is a legally binding document that commits you and the buyer.

✘ **Don't accept more compensation than what is provided for in the agreement with your buyer.**

- Under the NAR proposed settlement, buyer brokers cannot receive compensation for brokerage services from any source that exceeds the amount or rate in the agreement with the buyer.
- Do not accept “bonuses” or other compensation from a seller or any other source that is more than what is in your written buyer agreement.

✘ **Don't share your signed buyer agreement with competitors (unless required by state law).**

- Written buyer agreements contain your compensation and other confidential information that may be material to a transaction and critical to a successful negotiation on behalf of your buyer.
- Note that some MLSs may institute auditing programs to ensure compliance with written buyer agreement rules, but those MLSs should keep the written buyer agreement confidential. REALTORS® should fully comply with these requests and local MLS rules.
- However, some states require disclosing the agreed-upon buyer agent compensation to the listing agent at certain points in the process so please make sure to follow all state laws and regulations.

✘ **Don't limit the properties you show a buyer or steer clients away from properties based on offers of compensation.**

- Under NAR's Code of Ethics and MLS policy, steering buyers based on the amount of broker compensation is prohibited.
- REALTORS® must inform buyers about any home available that meets their criteria, regardless of whether (or how much) the seller or listing agent is offering compensation.
- A buyer should be in the driver's seat with respect to their search and the homes they wish to pursue.
- Agents should educate buyers on the pros and cons of each option available when looking at and making an offer on a property, including that buyers can ask sellers to pay for buyer broker compensation as part of the offer, even if there is no offer of compensation.
- Refusing to inform your client of properties because they are being sold by a broker, agent, or seller who is not offering compensation is inconsistent with these principles.

**Consult your state and local REALTOR® association for detailed information about state and local law where you operate your business. For more helpful resources, please visit [facts.realtor](https://facts.realtor) and explore our [Consumer Guide series](#) catered directly to home buyers and home sellers.**

## NAR MEMBER RESOURCE: DOS AND DON'TS WHEN WORKING WITH SELLERS

***The practice changes required by NAR's settlement must be implemented in good faith. NAR opposes any attempt to circumvent the practice changes.***

This resource will help you implement the practice changes and empower you to transact business consistent with the settlement, your ethical duties, and in the best interest of consumers. It is meant to provide clarity about business practices allowed under the settlement, as well as those that are not permitted. NAR members should not engage in the practices that are “don'ts” in this guide.

The consequences for failing to abide by the terms of the proposed settlement may be severe—including losing your released status under the settlement and losing NAR membership. Regardless of your NAR membership status, if you fail to abide by the terms of the settlement, you can lose MLS access or even face possible legal liability.

Below are important dos and don'ts to observe when working with sellers. Please continue to follow [facts.realtor](https://facts.realtor) for the most up-to-date dos and don'ts and all updates on how to navigate the settlement and practice changes, as well as for resources to help you continue to deliver value to and assist homebuyers and sellers on the homeownership journey.

### DOS WHEN WORKING WITH A SELLER

- ✔ **Clearly and frequently demonstrate your value.**
  - Early in the relationship, emphasize your unique expertise and experience and explain that one of the core reasons to use a REALTOR®, instead of just a real estate licensee, is that REALTORS® are required to act in the client's best interest under the Code of Ethics.
  - Consider sharing [this guide](#) with your client about “REALTORS®' Duty to Put Clients' Interests Above Their Own.”
  
- ✔ **Explain what an offer of compensation is and why a buyer may opt to seek buyer agent compensation from the seller.**
  - Inform the seller that covering all or a portion of the cost of the buyer's agent's services may increase the potential buyer pool for their home. This is because it reduces up-front costs that may be prohibitive for some prospective buyers, particularly first-time buyers, low-income buyers, or those from underserved communities.
  - Make sure to emphasize that it is the seller's choice whether an offer of compensation is made, when the practice of offers of compensation is consistent with your business practices.
  - If an offer of compensation is made, inform your sellers that offers of compensation may be marketed off MLSs and consider sharing [this guide](#) on offers of compensation with them to help them make an informed choice.
  - You should also inform your seller that buyers may ask the seller to cover some or all of the buyer agent's fee as part of a purchase agreement. It is always up to the seller whether to accept this type of request.
  
- ✔ **Prior to signing a listing agreement, ensure the seller understands their options.**

- Help them understand their options while continuing to seek fair compensation for your services. Ensure they know compensation is fully negotiable and not set by law.
- ✔ **Get prior written approval from the seller before offering compensation.**
  - Clearly disclose and get approval in writing from the seller before offering any compensation or making a payment to another agent representing a buyer.
- ✔ **Inform the seller that a buyer may seek compensation for their agent.**
  - Even if a seller decides not to offer compensation to a buyer's agent, inform the seller that it is possible that a buyer may request compensation for their agent.
- ✔ **Present all offers to the seller and always treat all buyers fairly and equitably.**
  - Under fair housing laws and the Code of Ethics, real estate professionals have a duty to treat every buyer fairly and equitably.
  - Discrimination in housing based on race, color, religion, sex (including gender identity and sexual orientation), familial status, national origin, and disability is prohibited.
- ✔ **Keep lines of communication open with your fellow industry professionals when it is to your client's advantage.**
  - Communicating with other brokers and agents helps you identify the best offer for your seller and fulfill your duty as their agent.
  - Answer the phone when appraisers call, as they need to know the details of the transactions they are analyzing, including the sales they consider as potential comparables.
- ✔ **Know and follow state and local laws.**
  - There may be additional requirements, including those for certain types of agent representation, based on state law and local practice.

## DON'TS WHEN WORKING WITH A SELLER

- ✘ **Don't use MLSs to make offers of compensation.**
  - The settlement practice changes prohibit offers of compensation from being made on an MLS that has opted into the settlement.
  - This prohibition applies to *any* MLS field. Relatedly, do not use MLS data or data feeds to establish another platform to host offers of compensation.
- ✘ **Don't share your listing agreement with competitors.**
  - Do not provide the signed written listing agreement to competitors because it will contain your compensation and other confidential information that may be competitively sensitive, material to a transaction, and critical to a successful negotiation on behalf of the seller.
- ✘ **Don't communicate the amount of an offer of compensation without your seller's instruction.**
  - If the seller decides to authorize an offer of compensation, the seller decides whether and when their agent can communicate the amount of compensation.

- Listing agents should follow the seller's instructions when it comes to communicating offers of compensation.
- For instance, a seller may want the buyer or the buyer's agent to initiate negotiation on the amount of buyer-agent compensation before disclosing the amount authorized.
- Conversely, the listing agent should not withhold the offer of compensation from the buyer broker when the seller has instructed the listing agent to make the offer known off-MLS to attract buyers.

✘ **Don't ask for copies of written buyer agreements.**

- The written buyer agreement requirement is an MLS policy and therefore enforced by the MLS.
- As with all MLS policies and rules, a consumer or other party can file a complaint with the MLS if an agent fails to comply.
- Under the Code of Ethics, access to a property should be given to other brokers when it is in the seller's best interest.

***Consult your state and local REALTOR® association for detailed information about state and local law where you operate your business. For more helpful resources, please visit [facts.realtor](https://facts.realtor) and explore our [Consumer Guide series](#) catered directly to home buyers and home sellers.***

# The more they know The more you'll grow

Impress potential clients with local market expertise and watch your business boom

## Local market expertise is a big deal

97%

of consumers feel it's important for their real estate agent to be a local market expert



24%

say it's the most important trait an agent can have

## There are 3 types of local expertise consumers care about most

### Market trends

Having up-to-date data can give you a leg up



85%

like to know the latest pricing trends



62%

want to know more about all recently sold homes



79%

are interested in average days on market



24%

want comparative analysis on recent sales

## Inside scoop on the neighborhood

Buyers want details on a whole range of insider knowledge

86%

Upcoming building assessments, HOA fees, and more

79%

Detailed knowledge of neighbors & neighborhoods



77%

Any future neighborhood development plans

52%

New home & development construction

## Commutes, education, and cuisine

Consumers are hungry for info on schools, traffic, and amenities

Nearly half are concerned about education.

School districts and boundaries

51%

School ratings and performance

46%



56%

Getting around is a big factor

Road, traffic & commute information

27%

Many think with their stomachs

New restaurant openings & closings

## Homes don't sell themselves. REALTORS® do.

Arm yourself with the tools that let you focus on what you do best. Learn more at [marketing.realtor.com](http://marketing.realtor.com)



Checklist

# The essential checklist for real estate agent success



# Introduction

At one point or another in your real estate career, have you ever secretly (or not so secretly) wished you had a list of all the cheat codes to unlock success? Being a real estate agent is tough enough, but being a successful real estate agent can make it hard to even know where to begin.

At Realtor.com, we're committed to our agents' success and making sure they're equipped with everything they need to know to get there. That's why we've developed the essential checklist for agent success, so agents know where to start, what to focus on, and what they need to build upon to succeed.

## But first, the mindset you need to have to achieve success

Before we get started, it's crucial we start on the right foot. Simply put, even with all the tools, you can't be a successful agent without having the right mindset first. It's like having all the ingredients, and knowing what you need to cook up, but not having the recipe. To be a successful agent, you need to have what's called a growth mindset.



A growth mindset means you're always thinking of your skills, abilities, learning, and talents as something you can improve and grow through your output of effort. You don't view success as a singular finish line, and you also don't view your capabilities as an agent as something that's set in stone. In short, you're always searching for learning opportunities, growth opportunities, challenges, and new ways of doing things.

By keeping a growth — or more flexible — mindset, you can reach success much easier. A growth mindset keeps you in the mode of always learning, growing, and evolving, even as you hit your goals and move onto what's next. With a growth mindset at the forefront of your outlook, let's get into the foundational tools you need to be a successful agent.

# Everything you need to find real success as an agent

Now that you're in the right state of mind, you're ready to start unlocking the cheat codes for what it takes to find success as an agent. We're breaking down the must-have, foundational components to help ensure you can be a successful agent. Here's everything you need, from start to finish.



## Having a mastery of your market

This one likely goes without saying, but if you want to succeed as a real estate agent, you need to know your local market and surrounding markets like the back of your hand. Having a mastery of your market is crucial to be able to identify opportunities, risks, and understand how to translate that information back to consumers. In turn, the clients you work with will feel confident in your abilities and knowledge as an expert, while you'll feel better equipped to serve them and nail any negotiations on their behalf.

### How to become a local expert in your market

There are a lot of different ways to [become a local expert](#). To start, you need to stay up to the minute on local market trends, and how national market changes are impacting them. You also need to keep your finger on the pulse of pricing, inventory availability levels, and new construction or infrastructure. If there are any changes in real estate laws, regulations, requirements, or other governing authorities, you need to dive into researching and understanding how these impact your clientele and their transaction experience.

All of this can be accomplished by keeping up with local and national news, staying up to speed with your broker or MLS, and keeping in regular contact with your network of other real estate professionals, either virtually or in person.

To really carve out your space in the market, it's also crucial you know it on a personal level. This means being an active member of your community through things like networking and volunteering. It also means educating yourself on emerging neighborhoods, issues impacting the community, and positioning yourself as a trusted, neighborhood expert — and not just a salesperson.

For more ideas and guidance on how to be a trusted source of knowledge in your market, make sure to read our article "[How to become a true neighborhood expert.](#)"



## Knowing who makes up your target audience (or audiences), inside and out

As you start to flesh out your community presence and understand what you want to accomplish as a real estate agent, you need to get clear on who exactly you're serving. Spoiler alert: you're not just serving anyone who wants to buy or sell a home. That's too far of a net, and with dozens (if not hundreds) of other agents competing for their attention in your market, you need to identify your target audience. Your target audience isn't just "someone who needs to buy a house" or "someone who needs their house sold." It's made up of people of specific characteristics, including but not limited to needs, demographics, and other defining factors.

Defining your target audience isn't meant to cut out your access to consumers. Instead, by taking a focused approach to the consumers you currently or plan to serve, you can better meet them where they currently are so they'll feel confident in trusting you and working with you. Knowing who your target audience is will influence crucial parts of your business like your brand positioning, marketing messaging, communications, and where you try to be seen by your target audience, both online and offline.



### Defining and getting through to your target audience

If you want to know who your target audience is, do a mini audit of your real estate business up until this point. Who are the typical consumers you serve? Where are you finding them, and how are they finding you? How are their transactions going? Most importantly, what do they all have in common (besides working with you)? These questions will help you start to narrow down your target audience. Once you have these findings, line them up with your areas of expertise as an agent to get even deeper insights into how you can effectively get through to them and make them want to choose to work with you.

For hands-on exercises that walk you through how to define your target audience, step by step, you can't miss our free workbook "[Understanding \(and reaching\) your target audience](#)". It's jam-packed with all the tools you need to determine, solidify, understand, and connect with your target audience as an agent.



## Having clarity on what sets you apart (also known as your brand)

In real estate, setting yourself apart from the competition is imperative to reaching success. While you already know you're a rockstar, market master, negotiation ninja, and much more, the people you serve need to know this, too. You can communicate this with them by developing a robust personal brand. Creating a brand isn't limited to giants like Coca Cola or Nike or Apple or anyone in between — it's for any professional. Your brand is what tells consumers the story of who you are, what you do, how you do it, and why they need to partner with you to achieve their real estate goals.

To create a strong personal brand, you need to start by knowing exactly what it is that sets you apart from other agents. Is it your experience level? Your background? The brokerage you're a part of? The skills you bring to real estate from a completely different industry? Once you're clear on your biggest differentiators, you'll want to start thinking of how you'll talk about your brand. What does your brand look like, what does it feel like, how does it sound? What do you want people to walk away with when they encounter your brand? These questions will start to shape your approach to customer service, marketing, your ongoing education, and so many other elements of your real estate business overall.

This is where you define your identity as a real estate agent. This is where you start to know what you'll tell people about who you are.

### Resources to help build, define, and grow your brand

To get the rundown on everything you need to know about building a powerful real estate brand as an agent, we've created a variety of resources to provide insight and help you along. Make sure you check them out:

- ["Personal branding 101"](#): Our guide for new agents to get the rundown of the importance of a personal brand in real estate, and what makes a good real estate brand. There's also a free personal branding workbook filled with activities and exercises to help define your own personal brand.
- ["Sweat the small stuff: Why the details of your real estate brand matter"](#): As you start to build your personal brand, keep this article nearby. It teaches you all the details, online and offline, that you need to zero in on that actually matter to consumers.
- ["How to be everywhere using branding"](#): This article teaches agents how to elevate their brand and grow its online presence so it's visible to more consumers — a.k.a, brand awareness.
- ["4 branding execution hacks for real estate agents"](#): Once you've established your personal brand, give this a read to get actionable, easy to use tips to help maximize your brand presence more efficiently.



## Providing superior customer service

As you navigate each real estate transaction from start to finish, you need to have excellent customer service and relationship building in mind. Once you reach the end of the transaction, you don't just shake hands with your client, finish the paperwork, and wish them well. The relationship continues.

Having a commitment to stellar customer service, an excellent customer experience, and maintaining your relationship with your clients is key to getting repeat business and referrals. These are a serious contributor to your ongoing success.

### How to provide outstanding customer service

Helping consumers navigate the purchase or sale of a home is oftentimes considered the transaction of a lifetime. It's a significant financial, emotional, and time investment for them. And with the logistics, legal requirements, and process required for a transaction, they need you as their beacon to guide them through it, step by step, with ease.

To do this, you need to make sure your real estate agent skills are in top form. But you also need to pay close attention to your soft skills, too.

Providing this level of service looks like:

- Modeling empathy in every interaction, such as showing genuine interest and commitment to understanding your clients' motivations, concerns, fears, preferences, and more
- Being responsive, and being clear on when, where, and how you can be reached
- Having transparent communication and ensuring your clients understand what's being shared, and that you're creating an environment where they feel empowered to speak up
- Going above and beyond wherever you can to meet or exceed your clients' unique needs

As you navigate the transaction to a successful close, remember: the relationship doesn't end there. You also need to stay in touch regularly with your clients, even after the deal is done. This can look like nurture campaigns, calling or texting to check in throughout the year, and even doing seasonal visits or sending small gifts. All of these actions keep you top of mind, so they know who to call — or who to send your way — when they need your services in the future.



## Adhering to a goal-oriented marketing plan

At this point, you're ready to bridge the gap between your personal brand, target audience, and deep expertise and skill set. This is the part of being an agent where you're ready to start shouting what you can offer from the rooftops. Thankfully, you don't need to head to a literal roof or to the town square like the old times. You just need to have a strong, scalable marketing plan.

### Creating a marketing plan

It might seem like a good marketing plan is fueled by fun tactics, cool content, and exciting visuals. In reality, your marketing plan needs to start with goals. What do you want to accomplish with your marketing? It might be a few things, like growing your brand awareness, lead generation, and hitting a certain number of client conversions. Start with your goals of what you want your marketing to do, then work backwards to carve out your plan for all the ways you can achieve those goals.

### Establish your online presence

As an agent, it's important to know nearly all consumers start their home search online. This means having a strong, consistent online presence is a must to staying competitive and getting seen by digital consumers. What does an online presence look like? First, you need to have professional business profiles on all the major social media platforms, like [Facebook](#), [Instagram](#), [LinkedIn](#), and even YouTube or [TikTok](#).

Then, you need to create a plan to post regularly and ensure what you're posting — your content — is valuable, educational, and empowers your audience and potential viewers with the information they need to know about you and your business. Remember: you're not just competing against other agents to get seen online, you're also competing against other businesses, influencers, creators, and more. Come from a place of authority, expertise, and keep your focus primarily in real estate.

Lastly, you need to ensure you're engaging with your audience. This looks like replying to messages and comments, sharing posts from other, relevant online pages, and engaging (respectfully) in online discussion. When people online see you're a power user of digital platforms, they can feel confident in the human behind the brand, and know it's not just another page to scroll through.

If you want a step by step breakdown of how to have a strong online presence and marketing gameplan, make sure you get our guide "[The online marketing roadmap for real estate](#)".

## Use intel from your target audience for your content

If the phrase “content creation” makes you feel a bit queasy, we promise: it’s not that hard or scary. In fact, it’s really simple. Just go back to the step where you identified your target audience and use them as your inspiration.

When you’re thinking of what to write, create, or post, ask yourself:

- What would my target audience want to see?
- What would they not care to see or be totally disinterested in?
- What is relevant to my target audience that they may not know about?
- What do I want my target audience to know, learn, or understand better?
- If I was in my target audience’s shoes, what would I want my agent to post?

Asking these questions gets you in the mindset to create educational, authoritative, and super relevant content, which will resonate well with your target audience. This helps drive engagement, get more eyes on what you’re posting, and reinforce your position as a trusted expert to this audience. Relevant content is how you stand out in a sea of agents. As your online presence grows and develops, your brand is reinforced with consistency, helping consumers feel more confident in you as a pro and more trusting of your brand.

**Don’t forget:** When you’re wrapping up a transaction and spirits are high, be sure to request testimonials and reviews from happy clients. Having honest, real-life feedback about what it’s like to *actually* work with you is incredibly valuable, proof-filled content. By sharing what their experiences were like, consumers can get a sneak peek of what they can potentially expect from a transaction you manage, and feel more confident partnering with you as their agent.

## Get a real estate website and maintain it

While social media reigns supreme in our digital-first world, websites are still crucial to have as a real estate agent. Think of your website like a hub of rich, valuable information that fully embodies your brand and your business. Use your real estate website to showcase your brand visually and tell a story of who you are and the services you provide. It’s also a powerful place to showcase your listings, display your client reviews and testimonials, and even showcase yourself as a thought leader through a blog.

If you’re wondering what your real estate website needs, or where to even get started, don’t worry — we’ve got you. Head over to our blog [“Real estate websites: Everything new agents need to know”](#) to get the lowdown and have a well-rounded, cohesive online presence.



## Regularly investing in your professional development

Remember the growth mindset we talked about earlier? This is where you can really put it to work. Real estate agents need to constantly be learning and growing their skills and expertise in the industry and beyond, like in technology and marketing. By making sure you're always keeping up on the latest trends, changes, and sharpening your skills as you go, you're positioning yourself for a career that can keep up with changing consumer and industry demands. And that is the type of career that lasts.

To succeed as an agent, you need to prioritize regular professional development to stay attuned, engaged, and keep expanding your mind and knowledge. What can professional development actually look like? For starters, it might be as simple as asking your broker for training or development opportunities. Outside of this, there's a world of possibility for agents.



### Network with other real estate professionals

To keep a finger on the pulse of your local market and beyond, make sure to attend local real estate networking events and meetups. This is a great opportunity to understand what other agents are experiencing, how they're overcoming challenges, and share what they're hearing from consumers. You can also attend real estate conferences, which typically showcase impactful speakers and offer hands-on workshops to learn fresh, relevant skills needed to succeed as an agent.

### Join local groups and associations

To meet more professionals, community members, and expand on crucial skills like communication, public speaking, and more, you can join local groups or associations. Consider getting involved with your Chamber of Commerce, local HOA, city organizations, or your local real estate board. You can join more specific groups for development, too, like Toastmasters, Rotary Club, or Business Network International (BNI).

In addition to expanding your skills, opening your mind to new perspectives, and positioning yourself as an active member of the community, you're also setting yourself up for a much smoother introduction for things like new clients and referrals from fellow members.

## Get a designation via the National Association of REALTORS®

Did you know the NAR offers certifications and designations in specific areas of real estate? If you're an active member in good standing with the NAR, you can enroll in their selection of coursework to earn credentials. It'll help you progress in your understanding and application of real estate, learn plenty of new approaches and strategies, and provide you with even more of a competitive edge against other agents in your market. It'll also help consumers feel more confident and trusting in working with you.

To learn more about what you can pursue, give our free guide ["8 professional designations to ramp up your real estate genius"](#) a read. See what piques your interest — you never know where in the industry it might take you.

## Always tune into learning with books and podcasts

Life gets busy, and real estate even moreso. To keep a steady hum of learning available to you at all times, make sure to keep up with books and podcasts about real estate and adjacent industries or topics.

We rounded up [20 books you can read for your business development here](#), covering areas like marketing, sales, and self-improvement. You can also download the audiobook version of these titles, so you can listen on the go while you keep up with your hectic schedule.

For more listening and learning, we also put together a compilation of [the best real estate podcasts for agents](#) and these [business books and podcasts](#).





## Implementing strong systems and processes

Now that you've reached this part of the essentials and foundational must-haves, it's pretty clear you've got a lot to manage in order to be successful.

This isn't meant to scare you, it's just to lead into how critical it is to have good systems and processes in place for your business. This is what will unlock your ability to work smarter, not harder, and ultimately free up more of your time so you can get back to doing more of what you love, face-to-face with clients.



### Have a powerful CRM and know how to use it well

At the core of your real estate business, you need a CRM. Your CRM, or customer relationship management tool, is where you'll keep all your client and prospect information and documents stored in one central location.

More than that, you'll track activities with each of these contacts, like phone calls, conversations, sales, and much more. Your CRM and marketing channels can also "talk" to each other, allowing you to build more personalized, impactful campaigns for things like lead generation and follow-up.

### Utilize automation wherever you can

To save time while still getting stuff done, you need to leverage automation. Whether it's [setting up nurture campaigns](#) through your CRM, setting autoresponders for emails and texts [through Connections Plus](#), or using Connections Plus to send relevant, timely market reports, you need to set and forget these important tasks to free up more time in your day.

Automation is also here to help your clientele feel like they're always hearing from you. To ensure your success as an agent, you can't skip out on using it.

## Master your time management

In real estate, time truly is money. If you want to be successful as an agent, you need to crush your time management skills and dominate your calendar. Set a daily schedule and maintain a daily task list, grouped by priority.

Block out your calendar ruthlessly to assign time to your tasks and meetings so nothing is missed. Communicate your availability so clients and colleagues know when to reach you, and when they can expect to hear back. Finding out how to create time as a real estate agent, even if it feels like it's out of thin air, will keep you on the fast track to success.

# Agents, your success is completely within reach

And really, your success is in the palm of your hands. With these foundational principles and components of real estate in mind, you can go forth and build a real estate business that grows, thrives, and stands the test of time.

Before you embark on your epic journey, we're giving you the ultimate, essential checklist for agent success. Keep it with you and keep track of your progress. You've got this — we know it.



Print the checklist on the next few pages to make sure you're setting yourself up for real estate success!

## Checklist

# The essential checklist for agent success

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### Being a master of my market

- I'm keeping up with local market and national trends
- I understand what's happening in the market and how it's impacting my clients locally
- I'm staying up to date with news, developments, and changes in my community
- I'm reaching out to colleagues and other real estate experts to understand what's happening in our market
- I'm an active, involved member of my community
- I'm confident in understanding my local market and communicating that to consumers

### Defining my target audience

- I'm drilling down common characteristics of the clients I typically work with
- I'm assessing my local market to see common demographics and traits
- I've downloaded "[Understanding \(and reaching\) your target audience](#)" and I'm doing the exercises
- I know who my target audience is

### Building my personal brand

- I know what sets me apart from other agents in my area and nearby areas
- I know how and why I'm the best fit for my target audience
- I've downloaded, read, and I'm using Realtor.com PRO's agent branding resources to define my personal brand

### Providing superior customer service

- I'm committed to my prospects and clients
- I'm an active, empathetic listener
- I seek to understand my clients' viewpoints, motivators, and concerns
- I'm transparent, timely, and considerate in my client communication
- I make sure my clients understand what I've shared with them, and that they feel comfortable to speak up
- Going above and beyond for my clients is a top priority
- I understand my clients' needs and use that to fuel my negotiations
- I have a plan in place to stay in touch with my clients after the transaction is over
- I'm remembering to ask for testimonials and reviews from happy clients

### Having a goal-oriented marketing plan

- I've created a marketing plan with clear goals
- I've set up professional accounts on all the major social platforms
- I've scheduled time to create and post content regularly
- My content is educational, timely, and relevant, especially to my target audience
- I'm posting content regularly
- I'm engaging with comments, messages, and posts regularly
- I've set up a real estate website and use and maintain it consistently
- I'm keeping up with my progress on my marketing goals and adjusting my strategy as needed

### Keeping up with my professional development

- I've signed up for real estate events in my local area
- I've signed up for at least one real estate conference this year
- I've joined at least two local groups in my community and actively attend meetings and events
- I'm pursuing a NAR designation to continue my education and dive deeper into an area of real estate
- I've subscribed to real estate and real estate-adjacent podcasts
- I've listened to at least two audiobooks related to sales, marketing, real estate, or personal development

### Having strong systems and processes in place

- I have a strong CRM and know how to use it to maintain my client database
- I know who to reach out to if I have questions or about my CRM
- I'm leveraging automation wherever I can, like in email and auto responses
- I have a handle on my schedule and feel confident managing it
- I'm confident in my time management and prioritization skills



[realtor.com/marketing](https://realtor.com/marketing)



Worksheets

# How to create a content strategy for your personal brand

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# Worksheet: Identify your unique value proposition

Feeling a little stuck figuring out the ingredients of your secret sauce? No need to sweat. Fill out your answers to the following questions below to get help identifying your unique value proposition. We left some extra space for you to jot down notes, doodle, and brainstorm to help you along, too.

What real estate niche or focus area interests you most?

What type of consumers are you passionate about serving?

What do you enjoy most about working with this consumer?

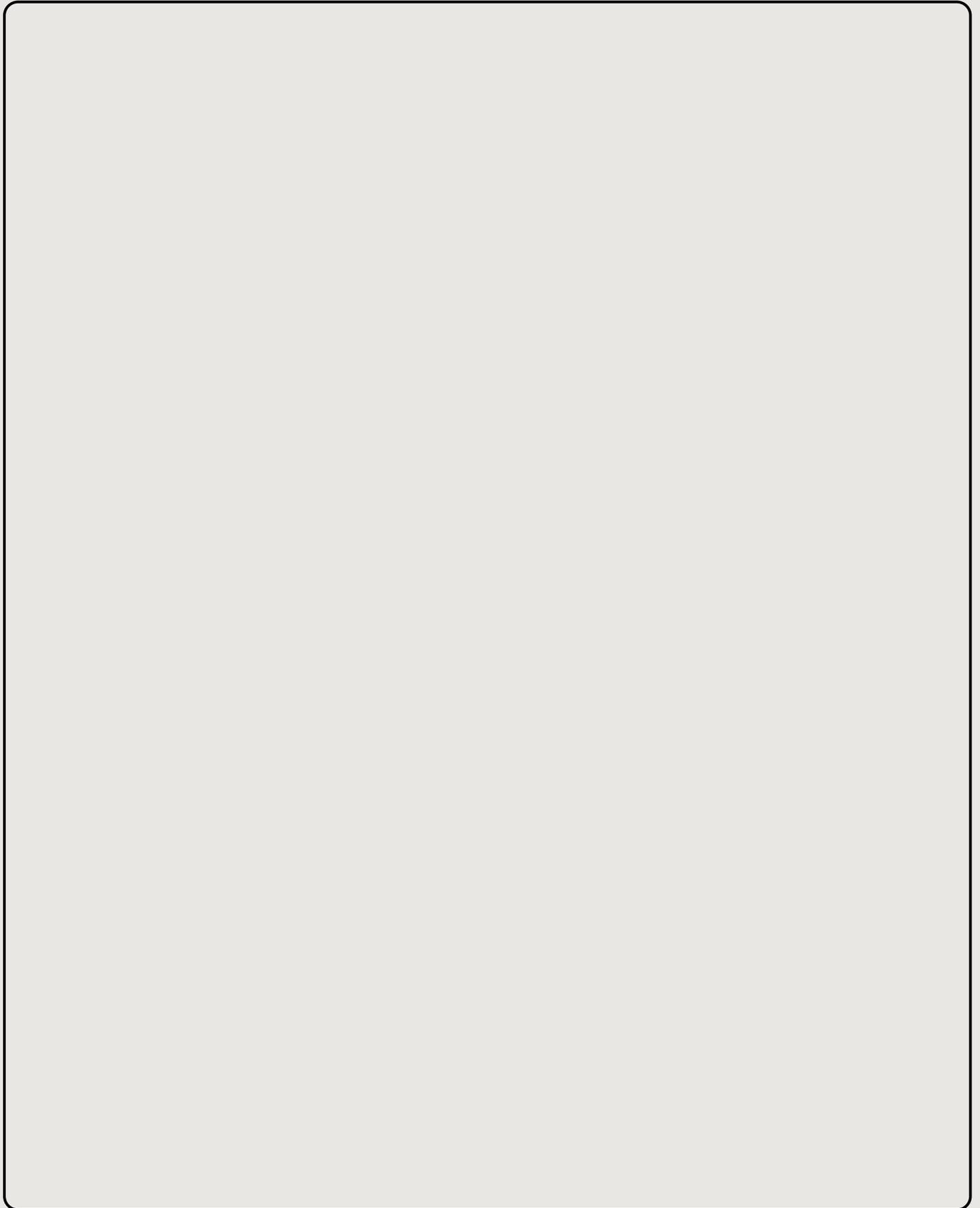
If you haven't had the opportunity to work with a specific type of consumer, what type of consumer interests you? Some ideas could be first-time home buyers or sellers, first-generation home buyers, military, and more.

What about you, your life and professional experiences, and your skill set makes you the perfect fit to serve this type of client? Don't be shy, the sky's the limit!

Pause here and review your answers. What are the common themes? Note them down here.

Reviewing the themes above, what do you feel is your unique value prop? (There might be more than one.)

## Brainstorming notes:



# Exercise: Building your content pillars

You've got your target audience defined and your value props dialed. Now, you need to sketch out your content pillars. Complete the exercise below to get started and charter a clear path forward.

Topics/subjects I'm interested in:

Topics/subjects relevant to my target audience:

Common themes compared to my value props:

The results in your "Common themes" column will help you determine and shape your content pillars. These might evolve over time, so set a calendar reminder to revisit them each quarter as you start to rack up more clients.

Check out the completed example below to help give you a jumpstart:

### Topics/subjects I'm interested in:

- How mortgage rates affect the state of my ZIP
- Instagram Reel trends
- Being a trusted resource for buyers in [ZIP]

### Topics/subjects relevant to my target audience:

- What do I need to get a mortgage as a first-time buyer?
- What do common real estate buying terms mean?
- How do I find a real estate agent?

### Common themes compared to my value props:

- Getting through to home buyers
- Educating them on simple real estate topics
- Ensuring they know I'm an expert specifically in first-time buyers

# Checklist: **Select your content types and channels**

Feeling overwhelmed by all the content possibilities out there? We get it, so we created the checklist below to give you a sort of word bank of all the content types and channels for you to choose from as an agent. Check the boxes or circle the options below to narrow down where you'll start to deploy your content strategy.

## **Content types:**

- Blogs
- Webpages
- eBooks
- Whitepapers
- Long-form videos
- Short-form videos
- Instagram Reels
- Story posts
- Facebook posts (single-image)
- Instagram posts (single-image)
- Carousel posts (multiple-images; FB or Insta)
- LinkedIn posts
- TikTok videos
- LinkedIn videos
- Quizzes

## Content types: (continued)

- Checklists
- Surveys
- Email newsletters
- Email nurture campaigns
- Written testimonials
- Video testimonials
- Written reviews
- Video testimonials
- Brochures
- Flyers
- Mailers
- Guides
- Events
- Webinars

## Channels to use:

- Your real estate website
- Your brokerage website
- Facebook
- Instagram
- TikTok
- YouTube

## Channels to use: (continued)

- X (Twitter)
- Threads
- Your LinkedIn account
- Your email platform
- Local publications
- Local events
- Local business's community news boards
- A client referral program
- Referral networks
- Your Realtor.com® agent profile

# Resources: To build your content creation up and out

Check out the following articles and free download guides we created below to help in every area of the content creation process.



[“9 social media apps real estate agents can use to streamline content”](#) is a great article to learn about apps specifically designed to make your social media content management easier and more efficient.



Wish you had a single view of all the important dates for the year ahead, beyond the usual holidays? Then you need to get our free download [“The ultimate social media holiday content calendar for real estate agents.”](#) We compiled a full year’s view of all the major holidays, months of note, and some fun dates to help get your content creation ideas going.



Once you’re ready to take your content up to the next level and make it work for you, you’ll need to read our blog [“How to use content marketing for real estate lead generation.”](#) It covers everything you need to know to maximize content marketing so you can generate leads.



Wish you had more time for content creation? We get it. That’s why we wrote [“7 ways to use your everyday real estate life to fuel your content strategy.”](#) which helps busy agents like you find time when there is none to create engaging content.



Want to get better at creating Instagram Reels? We know you do. Don’t miss out on our free eBook [“Keep it reel: Everything agents need to know about Instagram’s top feature”](#) to get started.



Being camera-shy is totally natural, but believe it or not, there are some seriously effective ways to use video in your content creation and marketing — being in front of the screen is totally optional. To see how, get our guide [“4 not-so-scary ways to start using video in your real estate marketing.”](#)

# Resources: To help strengthen your personal brand

In some ways, strengthening your brand is a lot like strengthening your muscles. Put your personal brand to work and make sure you're maximizing it to the fullest with the following brand focused resources.



Start here with the free eBook "[Your personal branding workbook](#)." We created this for new agents just starting out in the industry, but the principles apply no matter where you are in your real estate career. Use the exercises to build out your personal brand, step by step, or simply crisp it up if it's gone a little stale or unclear.



The ultimate goal of your personal brand? To be seen everywhere, by everyone, all at once. Read "[How to be everywhere using branding](#)" to know how to do this.



If you don't even know where to start with your personal brand, check another article we made for the newbies "[Personal branding 101](#)" to learn the ropes of your personal brand and its role in real estate.



Got a good grasp on your personal brand, but not feeling confident in executing it? We've got you covered. Just read "[4 branding execution hacks for real estate agents](#)."



2024 has been an innovative year. And just because the calendar may have turned another page, that doesn't mean you can't look back. Check out our blog "[The 3 best branding strategies for real estate in 2024](#)" to get some fresh ideas for your personal brand.



Did you know you could take a peek over the fence at all the other agents in your market to know how to make your brand better? It's true. Read "[5 things your competitors can teach you about real estate branding](#)" to learn how.



[realtor.com/marketing](https://realtor.com/marketing)



the importance of  
**REVIEWS & RECOMMENDATIONS**

FOR

real estate agents

**97%**

of consumers read  
online reviews



**85%**

of people trust online  
reviews as much as  
personal recommendations

**73%**

of consumers say that  
positive reviews make them  
trust a business more



**68%**

will leave a review  
if they're asked to

Source: Bright Local 2017 Consumer Review Survey

# Everything agents need to capture stellar real estate reviews

Scripts and templates for success



Sally Smith



Thank you for the amazing support throughout the sale of my home!



Frances Wilson



You made every step of the buying process easy and seamless. I would highly recommend you to anyone in Austin.



Justin Silva



The best real estate agent in South Carolina! Thanks for all you did to help with the sale of our mother's house.



# Introduction

Regardless of their generation, nearly all home shoppers use the Internet as the first step in their home search process. It's not just real estate that relies on solid word of mouth; a 2023 study conducted by PowerReviews uncovered nine in 10 consumers read and consider reviews before making a purchase decision.

It's no surprise, especially since we look at reviews for just about everything before we decide to invest money, time, or both into it. From restaurants to clothing companies, running shoes to doctors, real-life reviews from real-life clients make a difference in creating trust before you even get in touch.

With these two studies, it's more apparent than ever: you must showcase your clients' testimonials online to strengthen your reputation and establish trust with new clients. We explored how important real estate reviews are, how to ask for them, and the biggest mistakes and errors to avoid when you request reviews.

You've got a well-rounded grasp on the power of real estate reviews, so how can you get a jumpstart on asking for them? With help from this workbook!

# The scripts you need for a successful review request

There are multiple places for you to ask your clients for their review, both online and offline. Save each of the following scripts for you to use for this variety of places and scenarios. Of course, tailor them and make them your own as you see fit!



## In-person scripts

### **Script #1**

At the closing table

Congratulations! It's been such a pleasure working with you to find your dream home, and I'd love to hear about your experience working with me before you settle into homeowner life! It'd be great if you'd be willing to share your thoughts about our experience working together with a review. Sharing your experience can help other home buyers/home sellers feel confident working with me. Here's the link [share QR code, print-out, or text] — do you have any questions for me?

### **Script #2**

Meeting post-close to tie up loose ends

It's so great to see you, and I'm so glad to hear everything is going well as you get settled for your move. I'm hoping I can ask for a few moments of your time to get your honest feedback about what it was like to work with me for the purchase/sale of your home. I'll text you the link now to submit at your earliest convenience!

## **Script #3**

At any follow-up meeting,  
post-closing

I'm glad we could get everything squared away today. I'm sure you're excited to get a move on your move! Before you jump headfirst into the next steps, can I ask you for a few minutes out of your busy day to share a review?

I'd love to get a testimonial from you. Hearing about your experience working with me, how I could help you, and any ways I can improve will help me tremendously. It'll also help other potential clients in [city] see if I'm a good fit for their buying/selling needs.

I'll text you the link now and follow up with an email that has the link if you'd prefer to leave your review from your computer!





# Phone scripts

## Script #1

I'm so happy we could help you today, and I appreciate your business. I couldn't do it without you! If you have the time and wouldn't mind, I'd love it if you shared a few words about what it was like working with me to buy/sell your home. It helps other potential clients in [city] decide if I'm the best fit for their home buying/selling needs, and gives them a good real-life perspective. I'll email you the link where you can write your review after our call!



## **Script #2**

It's been so great working with you through this process. I'd love to hear how I did, so if you have a few minutes to spare, I'd really appreciate you taking the time to write me a review. I'll text you the link to where you can write and submit it after our call. As always, if you have any questions, don't hesitate to reach out!

## **Script #3**

I'm so glad to hear everything is going so well! Before we close out, I was hoping to see if you could spare some time out of your busy day to write me a testimonial. I'd love to hear about what it was like working together from your perspective. It helps me do better for my clients, and it's so valuable to me to hear how I can improve. I'll email you the link where you can write your testimonial once we hang up.



## **Text scripts**

### **Script #1**

Hi [Client's Name], your feedback helps me be a better agent. Could you share a few lines about what it was like working with me? [insert link] Thank you! 🌟

## Script #2

Hi [Client's Name], hope you're settling in nicely! Can I ask for your feedback on what it was like working together in a testimonial? 🙏 [insert link] Let me know if you have any questions!

## Script #3

[Client's Name], it was such a pleasure working with you. Could you share a quick testimonial on your experience? It'd mean a lot! 🏠 [insert link]

## Script #4

Hi [Client's Name], it's been so great to partner with you on your buying/selling journey. Would you be open to writing a quick review to share your experience? Your perspective can really make a difference helping other buyers/sellers make informed decisions. [insert link]  
Thank you!



# Email templates

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## Initial inquiry

### Template #1

Subject line: We'd love to hear from you!

Body:

Hi [first name],

It's hard to believe it's been [insert days or months] since closing day — time sure flies! We hope you're settling in nicely and all is going smoothly. It was such a pleasure helping you find/sell your home sweet home, and we'd love to hear about how we did. If you can spare just a few moments and click the link below to share your feedback, it'd be so appreciated.

[Insert link]

Thank you so much for your time and for being my client! I'm always here to help.

All my best,  
[Your name]



## Template #2

Subject line: So... what was it really like working with us?

Body:

Hi [first name],

We loved working with you, and we really hope you feel the same way, too. If you're so inclined, can we borrow a few minutes of your time to ask for a testimonial? Just click the link below.

[Insert link]

I'd love to hear about your experience working with me. Let me know if you have any questions!

All my best,  
[Your name]

## Template #3

Subject line: [Client name], can I ask for your testimonial?

Body:

Hi [first name],

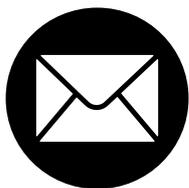
It was such a pleasure helping you buy/sell [address of home]. I'd love to hear more about what it was like working together. Your feedback can help other potential clients get a better idea of what it's like having me as an agent, and it also helps me improve as a real estate pro!

To leave your testimonial, click here:

[Insert link]

I appreciate you taking time out of your day to leave a few words. Let me know if you have any questions!

All my best,  
[Your name]



# Email templates

## After follow-up phone call

### Template #1

Subject line: RE: Your review

Body:

Hi [first name],

It was great chatting with you today! As discussed, please visit the link below to share your perspective about what it's like working with me to buy/sell. It's been a pleasure to be your agent, and getting your feedback helps me serve clients better and helps other potential buyers/sellers find me.

[Insert link]

Thank you so much for your time and for being my client! I'm always here to help.

All my best,  
[Your name]

## Template #2

Subject line: Following up on today's convo

Body:

Hi [first name],

It was wonderful to catch up earlier, I'm so glad to hear everything is going well! Thanks again for taking the time to write a testimonial about working with me. Click the link below to get started, and please don't hesitate to reach out with any questions:

[Insert link]

I really appreciate you sharing your feedback!

All my best,

[Your name]

## Template #3

Subject line: I'd love to read your review!

Body:

Hi [first name],

Following up on our phone call earlier today. I'd love to hear about your experience working with me as an agent, so if you have a few minutes to spare, I'd really appreciate you taking the time to write me a review.

To write your review, click here:

[Insert link]

I appreciate you taking time to share your experience and feedback. Let me know if you have any questions!

All my best,

[Your name]



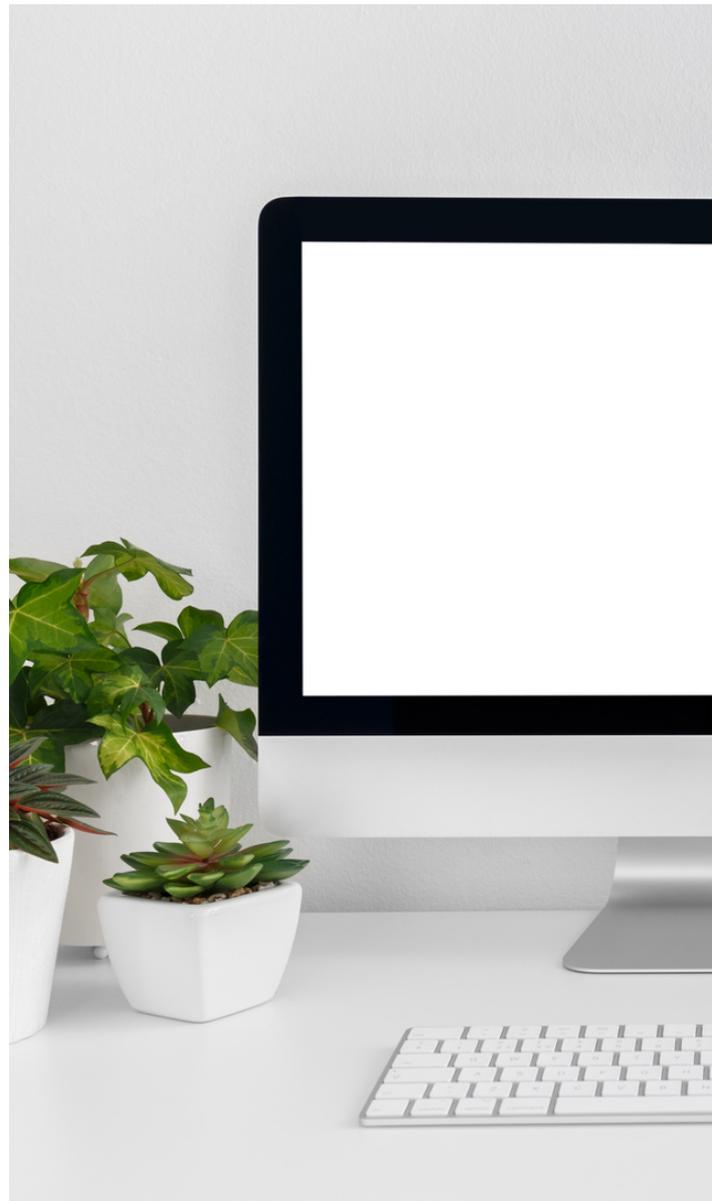
# On your website

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Use the scripts below to lay out your real estate website with your developer. When creating your testimonial form, make sure your form includes fields to collect the following information from your clients:

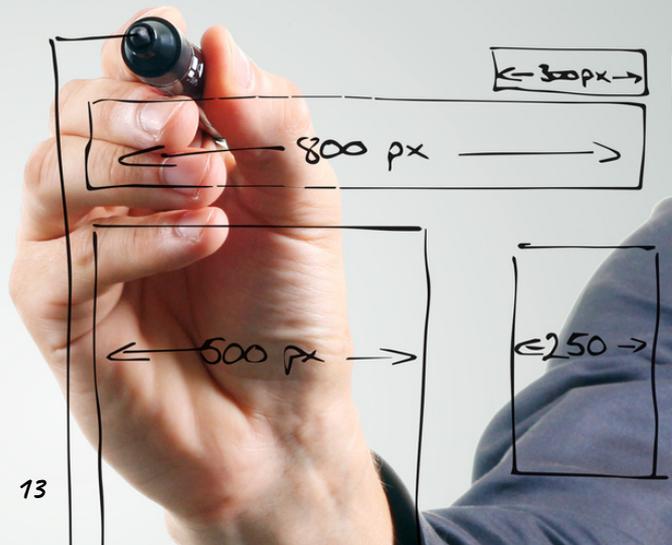
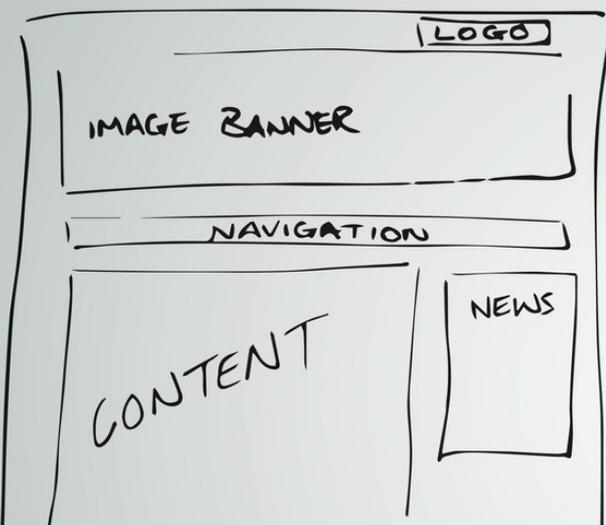
- Their first name
- Their last name, or last initial
- A file upload for their photo (optional)
- A brief consent text to use their testimonial
- Questions to guide their responses in separate boxes:
  - Why did you choose to work with me to buy or sell your home?
  - What was the best part of your experience working with me?
  - What challenges did I help you overcome during the buying, selling, and search process?
  - Is there anything I could have done differently?
  - Would you recommend me to friends and family? Why or why not?

Be sure to include existing testimonials on this page, so clients can see what their review will look like once it's shared.



	Landing Page	Body Copy	Button Copy
Script #1	Tell me how I'm doing. I'm all ears!	I love working with my clients, and I'm always eager to do better as an agent in [city]. Please fill out the form below to share your testimonial. Thank you!	Share testimonial
Script #2	Your review is appreciated:	What was it like working with me? I'd love to hear about it! Share your thoughts below by filling out the form.	Leave a review about [your name]
Script #3	What's it like working with me?	I'd love to hear about your experience in your buying/selling journey in [city] with me. Use the form below to share a few words – it's so appreciated!	Share my feedback

## Homepage





## Via social media

### Facebook Messenger Scripts

Hi [Client's Name], it was a pleasure helping you find your dream home. Can you take a moment to leave a review for me? Your thoughts matter! [insert link]

Hey [Client's Name], I hope you're settling into your new home nicely. Would you mind taking a few moments to share what it was like working with me? Your feedback is appreciated! [insert link]

Hi [Client's Name], I'm here to make your experience better. Could you write a review for our time working together? It helps me serve you and others even better! [insert link]

Hello [Client's Name], I'm always eager to provide top-notch service to my clients. Would you kindly share a review so I can see how I'm doing? Your opinion matters! [insert link]

## Instagram Direct Message Scripts

Hey [Client's Name]! 😊 I'd love to hear about your experience working with me to buy/sell. Could you share it with me here? [insert link] 🏠 Your review helps me be a better agent!

Hi [Client's Name]! I'd love to hear your feedback on what it was like working with me. Could you write a quick review about your experience? 📝 [insert link] It means the world! 🏠

Hey [Client's Name]! 🏠 I'm always here to make your real estate experience great. Can you share a review of my service? 🌸 Your input is invaluable! [insert link]

Hi [Client's Name]! 😊 I'm always dedicated to excellence for each and every one of my clients. Can you write a review of your experience? [insert link] Your feedback guides me toward success! 💖





# Checklist: Are you review ready?

Use the checklist below to ensure you're ready to start sourcing, using, and managing your real estate reviews.

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- I have a single, centralized place for my reviews to be submitted and to live
- My review submission process is streamlined and easy to use
- I've made sure my review submission process is also quick and simple on a smartphone
- I'm asking for a review after the close of the transaction
- I have scripts selected and ready for each scenario to request a review
- I'm working my reviews into my content plan
- I'm creating marketing content for my reviews
- I'm making a plan to promote my real estate reviews at a healthy pace
- \_\_\_\_\_  
(Add your own action item or reminder)
- \_\_\_\_\_  
(Add your own action item or reminder)
- \_\_\_\_\_  
(Add your own action item or reminder)



# The anti-checklist: Review-requesting mistakes to avoid

On the flipside, keep this checklist handy to ensure you're asking for reviews from your clients in the smoothest way.

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- I'm not offering any incentives in exchange for a review
- I'm not specifying how or what my client's review should say or describe
- I'm not holding my clients captive at the closing table until they write a review
- My review submission process isn't difficult to figure out or use, even from a smartphone
- I haven't forgotten to say thank you to my clients after they've left a review
- I'm not forgetting a strategy for requesting reviews from my clients
- I'm not posting any anonymous reviews
- I'm not forgetting to use my reviews regularly in content, marketing campaigns, printed materials, and my website
- I'm never spamming my social media followers with reviews
- I didn't forget to complete my [Realtor.com® agent profile](#)
- I didn't forget to set up review request reminders on my Realtor.com® agent profile to email me when a transaction has closed
- I didn't delay choosing a home for where my reviews will primarily live, and where clients can submit them



[realtor.com/marketing](https://realtor.com/marketing)



ICON	NAME	INFO	JOIN
	Linktree Page	Find all my contacts in one link.	<a href="https://linktr.ee/therealyasherica">https://linktr.ee/therealyasherica</a>
	Personal Website	All things relating to me, my business, and the services I offer.	<a href="https://therealyasherica.com">https://therealyasherica.com</a>
	Call	For detailed discussions, scheduling consultations, or resolving time-sensitive issues.	843-405-9169
	Text	For quick follow-ups, confirmations, or urgent updates on the go.	843-405-9169
	Email	For sharing documents, detailed inquiries, or requesting comprehensive resources.	therealyasherica@gmail.com
	Google Meet	Virtual meetings to discuss strategies, review progress, or address any questions about your real estate journey.	therealyasherica@gmail.com
	Instagram	Follow me for “Market Monday” updates as I share real estate stats and trends to keep you informed!	<a href="https://www.instagram.com/realyasherica?igsh=dXd5cGk0eHQ1ZXk4&amp;utm_source=qr">https://www.instagram.com/realyasherica?igsh=dXd5cGk0eHQ1ZXk4&amp;utm_source=qr</a>
	Threads (IG)	Dive into “Market Monday” on Threads for key moments of real estate reports.	<a href="https://www.threads.net/@realyasherica?igshid=NTc4MTlwNjQ2YQ==">https://www.threads.net/@realyasherica?igshid=NTc4MTlwNjQ2YQ==</a>
	LinkedIn	Connect with me on “Tribe Tuesday” as I spotlight real estate professionals and fields that make a difference.	<a href="https://www.linkedin.com/in/yasherica-goodin-6b3675344?utm_source=share&amp;utm_campaign=share_via&amp;utm_content=profile&amp;utm_medium=ios_app">https://www.linkedin.com/in/yasherica-goodin-6b3675344?utm_source=share&amp;utm_campaign=share_via&amp;utm_content=profile&amp;utm_medium=ios_app</a>
	YouTube	Join me on “Welcome Wednesday” for a behind-the-scenes look at my personal real estate journey.	<a href="https://youtube.com/@realyasherica?si=raGdA0sl6X2Wnlyw">https://youtube.com/@realyasherica?si=raGdA0sl6X2Wnlyw</a>
	Snapchat	Catch open moments on Snapchat for “Welcome Wednesday” as I share my real estate routines.	<a href="https://snapchat.com/t/DJBTYj6n">https://snapchat.com/t/DJBTYj6n</a>
	TikTok	Get real estate advice and must-know keywords every “Tips & Terms Thursday” to make your journey smoother!	<a href="https://www.tiktok.com/@realyasherica? t=ZP-8uDJKmfsApz&amp; r=1">https://www.tiktok.com/@realyasherica? t=ZP-8uDJKmfsApz&amp; r=1</a>
	Facebook	Discover local insights about the Grand Strand, SC every “Field Friday” - your guide to the community and lifestyle.	<a href="https://www.facebook.com/share/16EZPtMxjn/?mibextid=wwXlfr">https://www.facebook.com/share/16EZPtMxjn/?mibextid=wwXlfr</a>
	X (Twitter)	Stay updated with “Statement Saturday” as I share key real estate information specific to South Carolina.	<a href="https://x.com/realyasherica?s=21">https://x.com/realyasherica?s=21</a>
	Pinterest	Explore “Society Sunday” highlights of popular locations across the USA for inspiration and travel.	<a href="https://pin.it/2iPMgooAM">https://pin.it/2iPMgooAM</a>