

EMPOWERING AGENTS. TRANSFORMING LIVES. BUILDING COMMUNITIES.

ODYSSEY

REAL ESTATE SERVICES LLC

EXCLUSIVE

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# WELCOME

Welcome to Odyssey Real Estate Services, where your journey to building a successful real estate career and business begins.

At Odyssey, we believe real estate is more than just transactional—it is about creating meaningful experiences, building lasting relationships, and unlocking opportunities that transform lives. Guided by our core values we are redefining what it means to be successful in real estate.



As you embark on this exciting journey with us, you'll discover that Odyssey is not your typical brokerage - it's a thriving environment where your your growth is nurtured and your success is celebrated.

Our commitment to your personal and professional development is unwavering, and we are dedicated to providing you with the tools, resources, and support to craft your own success story, build a lucrative career, and elevate your personal brand.

Whether you are new to the industry or a seasoned professional, your journey with Odyssey will be marked by collaboration, innovation, and the freedom to explore your full potential. Together, we will navigate the challenges, celebrate the victories, and continuously strive to set new standards in real estate.

**Welcome to Odyssey Real Estate Services**—where every journey is a story, and every story is yours to create. It all begins with you.

# BE THE HERO OF YOUR OWN STORY AND A ROLE MODEL FOR OTHERS TO REPLICATE



# ONBOARDING & ORIENTATION

- Onboarding Paperwork
- 16 Personalities Review
- Odyssey Mission, Vision, Values, and Culture
- Services, Benefits, and Compensation
- Odyssey Policies and Procedures Manual



# **ONBOARDING CHECKLIST**

NAME	Technology
START DATE  Associate Jr Sr  Paperwork  Agent Profile Real Estate License Verification Copy of Driver's License	Email Setup w/ Signature Phone Setup & Voicemail Intranet Setup Back-Office Setup Website Setup Association & MLS Setup Social Media Setup
<ul><li>Copy of Certifications/Designations</li><li>Independent Contractor Agreement (ICA)</li></ul>	Marketing
<ul> <li>□ Payment Authorization Form</li> <li>□ Direct Deposit Election Form</li> <li>□ 16Personalities.com Profile</li> <li>□ Headshot</li> <li>□ W-9</li> <li>□ DBPR License Transfer</li> <li>□ Policies &amp; Procedures</li> <li>Acknowledgment Form</li> </ul>	<ul> <li>□ Business Cards</li> <li>□ Sign Rider</li> <li>□ Social Media Announcement</li> <li>□ Social Media Covers   Headers</li> <li>□ Bio One-Pager</li> <li>□ Nametag</li> <li>□ Listing Presentation</li> <li>□ Buyer Presentation</li> </ul>
Tasks and Notes	

# 16 PERSONALITIES

# **Analysts**

Intuitive (N) and Thinking (T) personality types, known for their rationality, impartiality, and intellectual excellence.

Architect INTJ Logician INTP Commander ENTJ

Debater ENTP

# **Diplomats**

Intuitive (N) and Feeling (F) personality types, known for their empathy, diplomatic skills, and passionate idealism.

Advocate INFJ Mediator INFP Protagonist ENFJ Campaigner ENFP

# Sentinels

Observant (S) and Judging (J) personality types, known for their practicality and focus on order, security, and stability.

Logistician ISTJ Defender ISFJ Executive ESTJ

Consul ESFJ

# **Explorers**

Observant (S) and Prospecting (P) personality types, known for their spontaneity, ingenuity, and flexibility.

Virtuoso ISTP Adventurer

Entrepreneur ESTP Entertainer ESFP

# **BROKER BIO**



# **LEO PACHECO**

SENIOR ADVISOR BROKER | OWNER

c: 407-515-7230 d: 321.804.8300

leo@odysseyflorida.com

- 28 years of expertise spanning business development, human resources, nonprofit leadership, public speaking, and real estate, with vast experience in multiple industries at various levels.
- 100% close rate, having sold over 65 homes in less than 18 months, generating over \$22M in gross sales.
- Recognized as Homesnap's Most Prominent Agent | 2021.
- Chairman of the Board for Clear Choice Academies, Inc., a leading charter school organization in Ocala, Florida.
- Founder of three non-profit organizations, including the Sharon K Pacheco Foundation, a charitable organization dedicated to supporting youth and adult programs.
- Best-Selling Author of Nine Published Books, including contributions to two Chicken Soup for the Soul books.
- Former TV & Radio Talk Show Host.
- Married to Angela, wife of 20 years, with two sons, John (20), and Michael (17).
- Hobbies include writing, beach outings, Disney, traveling, and spending time with family.













Odyssey Real Estates Services a/k/a Odyssey Realty is a fullservice, value-driven real estate firm committed to elevating professionalism and delivering an exceptional **experience** for all.

# **ODYSSEY**

A daring adventure of discovery, growth, and transformation. Odyssey represents an unfolding story where each step is an opportunity to redefine possibilities, push boundaries, and explore uncharted territories. In the realm of real estate, "Odyssey" embodies the bold pursuit of personal and professional mastery, where every challenge is a chance to carve out a unique path and every success is a testament to the power of vision and resilience. It's not just about the destination; it's about the journey that redefines who you are along the way. At Odyssey, we help you find your way home.



At Odyssey Real Estate Services, our mission is to deliver an exceptional real estate experience through professionalism, expert guidance, world-class training, and unmatched value.

our vision

To be the premier real estate service provider, recognized for redefining excellence through innovation, expertise, and empowerment—transforming lives, inspiring growth, and creating lasting value in every journey we guide.



EMPOWERING AGENTS.
TRANSFORMING LIVES.
BUILDING COMMUNITIES.



# our core values

# C | Commitment

Dedicated to delivering exceptional service and building lasting relationships.

# **O | Opportunity**

Creating pathways for growth, transformation, and success.

# M | Mastery

Striving for excellence through continuous learning, training, and expertise.

# P | Professionalism

Upholding integrity, accountability, and respect in every interaction.

# A | Adaptability

Embracing innovation and navigating change with resilience and creativity.

# S | Service

Providing value-driven solutions that inspire and empower others.

# S | Support

Fostering collaboration, encouragement, and guidance to achieve shared goals.





our culture

At Odyssey Real Estate Services, community transcends physical spaces; it's the culture we build on shared values, mutual respect, and a strong sense of belonging. Our commitment to service, professionalism, and collaborative support creates an environment where innovation thrives and each team member is encouraged to reach new heights.

We value authentic relationships, knowing that trust and communication are key to exceptional service. Our culture not only celebrates successes and supports growth but also empowers every individual to bring their unique talents to the table. At Odyssey, we don't just work together—we grow together, embracing passions, faith, family, fun, friendships, freedom and fulfillment in both our personal and professional lives.













# THE TRUTH ABOUT REAL ESTATE

# 100% COMMISSION MODEL TREND

# 100% Commission Typically Means:

- · Going It Alone
- Minimal Support
- Limited Training
- Higher Fees
- Reduced Collaboration
- Scarce Leads
- Significant Time Spent on Paperwork Instead of Growth and Customer Acquisition

A 100% commission structure appeals to experienced, high-performing agents who desire being a "lone ranger," but can be challenging for newer or lower-producing agents. This model emphasizes independence, it often lacks in-person support, hands-on mentoring, accountability, and localized training. Agents may encounter limited collaboration opportunities, minimal support services, and higher out-of-pocket costs due to brokerage fees and a do-it-yourself approach. Consequently, agents may find themselves dedicating more time to managing transactions and administrative tasks, leaving less time to focus on business growth, branding, and client acquisition.

# RECRUITING, REVENUE SHARE, & STOCK OPTIONS

#### **Recruitment-Based Means:**

- Emphasis on Recruiting Over Selling
- · Multi-Level Marketing Approach
- Market Oversaturation Risks
- Lower Agent Quality
- Declining Professional Standards
- Limited Growth Opportunities
- Questionable Incentives | Worthless Stock Options and/or Unachievable Expectations

Recruitment-based brokerages offer incentives like passive income through tiered revenue sharing and stock options, appealing to entrepreneurial agents who value autonomy and team-building. However, this model may shift focus away from real estate transactions as agents prioritize recruitment efforts. Resembling multi-level marketing, it can be perceived as a pyramid scheme, emphasizing network growth over sales performance. This structure risks oversaturation, lowering agent quality and professional standards. Additionally, stock investments promoted as growth opportunities have often underperformed, leaving agents with minimal returns.

# **MAJOR FRANCHISES & BRAND RECOGNITION**

#### **Franchise Models Means:**

- Nationwide Brand Recognition
- Reduced Agent Autonomy
- Strict Marketing Guidelines
- Higher Costs

# **Boutique Brokerages Means:**

- Personalized Support
- Lower Fees
- Limited Brand Recognition
- Enhanced Training
- Fewer Corporate Benefits
- Stronger Collaboration

Agents often join nationwide franchises for credibility and brand recognition, but most clients prioritize an agent's reputation, success, and service over brokerage affiliation. Smaller or independent brokerages may lack national recognition but often provide personalized services, lower fees, and greater value. Building a strong personal brand in the local market is key to credibility and referrals. Boutique franchises, while offering fewer large-scale perks, often provide more services, better training, and a collaborative environment, appealing to agents who value support and teamwork.

# THE ODYSSEY EXPERIENCE

Odyssey Real Estate Services delivers a superior opportunity and service compared to the other models by combining the best elements of each while avoiding their limitations. Here's how Odyssey stands out:

# **BALANCED COMPENSATION & SUPPORT**

Unlike 100% commission models that often lack mentoring, training, and collaboration, Odyssey provides **comprehensive coaching**, **training**, **and hands-on support** to help both new and experienced agents excel. With **live training sessions**, **personalized mentoring**, **and a collaborative environment**, Odyssey fosters growth and reduces isolation—allowing agents to thrive without sacrificing earnings potential.

# FOCUS ON REAL ESTATE, NOT RECRUITMENT

Odyssey prioritizes **transactional success** and **client service** over recruitment-driven income streams. While some brokerages mirror multi-level marketing structures that emphasize recruiting over sales, Odyssey is dedicated to **building sustainable businesses rooted in performance, expertise, and <b>client relationships**, not downlines.

# PERSONAL BRANDING & LOCAL MARKET LEADERSHIP

While national franchises rely on brand recognition, Odyssey empowers agents to **develop strong personal brands** that resonate within their local markets. With tools and strategies designed to build credibility, generate referrals, and foster deeper connections, Odyssey helps agents position themselves as **trusted local experts**.

# **VALUE-DRIVEN SERVICE & FEES**

Odyssey combines the **personalized service and affordability** of boutique brokerages with **cutting-edge resources**, **training**, **and support**. This approach reduces overhead costs while enabling agents to focus on **growth**, **branding**, **and transactions** without being burdened by excessive fees or limited resources.

# **COLLABORATION & PROFESSIONAL GROWTH**

Unlike models that encourage competition or independence, Odyssey champions **teamwork**, **accountability**, **and resilience** through a **collaborative culture**. Its **community-driven approach** nurtures both personal and team success, reflecting its core values of **service**, **professionalism**, and **support**.

In summary, Odyssey Real Estate Services delivers unmatched opportunities for agents by offering **higher earnings potential** with lower overhead costs, **comprehensive support** through experiential coaching and hands-on training, **greater transaction volume** driven by practical strategies and accountability, and a **client-centered approach** that prioritizes professionalism and exceptional service.

This unique combination makes Odyssey the ideal environment for agents ready to build thriving, sustainable businesses without the pitfalls of other models.

# REALITY CHECK DID YOU KNOW?



In Florida, the average number of closed transactions per real estate agent per year is between

8-12

Top Producers average 20-40 per year

On average, agents spend between

30-70

hours helping buyers

On average, agents spend between

20-40

hours helping sellers



Higher Compensation + Increased Transactions + Lower Expenses = Higher Revenue &

**COMBINED WITH** 

More Support + Comprehensive Training + Advancement Opportunities = Time Freedom

When you discount your fees, you discount your value. Consumers pay for value, even if there is a cheaper version of the same or similar product or service.

# ODYSSEY PARTNERSHIP MODEL

At Odyssey Real Estate Services (ORES), partnership goes beyond a mere arrangement or title—it's a dynamic collaboration where our associates and service providers join forces as true business partners. Driven by a shared purpose, authenticity, reliability and teamwork, we nurture growth and development while embodying the entrepreneurial spirit of visionary resilience. We believe together, we achieve more!

# -PARTNER-

PURPOSE-DRIVEN | AUTHENTIC | RELIABLE | TEAM-PLAYER | NURTURING | ENTREPRENEURIAL | RESILIENT

# TEAM

TOGETHER EVERYONE ACHIEVES MORE

# as a true partner, we believe in...

- · Creating a Collaborative Environment where Experience and Authenticity Thrive;
- Providing Countless Resources and World-Class Opportunities for Success;
- Coaching, Mentorship, and Accountability with Practical Application of Knowledge;
- Lower Shared Expenses, Higher Revenue and Transactions, and Multiple Streams of Income, to help our Partners Create their Lifestyle of Choice;
- · Lower Risk for Partners and Clients alike;
- Fostering a Dynamic Culture where Everyone is Welcome and Appreciated, no matter your Level of Expertise or Experience;
- · Elevating and Celebrating Each Other's Achievements;
- Mastering Innovative Marketing Strategies that Build Your Brand and Your Business;
   making you the Go-To Guru and Expert in Your Market.



# REDEFINING REAL ESTATE A SHIFT IN MINDSET & TERMINOLOGY

The fundamental shift in how we perceive ourselves and how the industry sees us is a powerful step towards elevating the real estate profession. Our Partnership Model goes beyond traditional methods. We are revolutionizing the way agents and clients connect, driving a shift in mindset that amplifies professionalism at the highest level of advisory services.

### **ASSOCIATES & PARTNERS**

Our team members are composed of highly skilled, elite professionals who set the bar in real estate. We prefer to call our agents **Associates**, elevating roles that more accurately reflect your expertise, skills, and business partnership.

### **ADVISORS & SPECIALISTS**

To customers and clients, we call ourselves Advisors, Specialists, or Consultants—titles that convey trust, expertise, and a dedication to delivering exceptional service and a high le vel of value.

# **FIRM**

Aligning with best practices of other professional sectors, such as law and accounting firms, we have rebranded the brokerage to **Firm**, an identity underscoring our commitment to providing comprehensive, top-tier services.

### PROFESSIONAL FEES

We embrace **Professional Fees** over the industry term "commissions," a testament to the value, expertise, and unparalleled service our clients expect. Our professional fee structure minimizes objections and provides more options to our clients.

# BY ADOPTING THESE NEW TITLES AND TERMS, WE:

# ENHANCE CLIENT TRUST

Clients are more inclined to trust and value the guidance of a high-level advisor than that of a traditional agent, reinforcing our role as trusted experts.

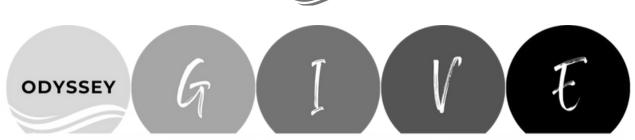
# PROJECT A HIGHER LEVEL OF PROFESSIONALISM

The way we perceive ourselves directly influences how we present and project to others. Embracing a higher standard of professionalism involves adopting titles and roles that reflect our expertise and professional stature.

# RAISE INDUSTRY STANDARDS

Aligning ourselves with other esteemed professional service advisors, sets us apart from the traditional brokerages and competition. This distinction highlights our unique value and positions us as a leader in the industry.

# ODYSSEY'S COMMITMENT TO CHARITY & COMMUNITY



GENEROSITY • IMPACT • VOLUNTEERISM • EMPOWERMENT

Odyssey is committed to supporting charitable causes and local communities through generous giving of financial and in-kind resources, impactful sponsorships and participation in sanctioned events, volunteerism, and empowering others through educational initiatives.

We call it our "Odyssey GIVE" initiative, and each month, Odyssey will select a pre-vetted charity of choice and contribute a portion of company revenue to supporting worthwhile causes. This will include incentivized promotions to encourage gift-matching, promotion, and participation in volunteerism, community engagement, and empowering others through individual and collective action.

Charities and events that Odyssey focuses on include causes that support the following:

- Education & Financial Literacy
- Entrepreneurship
- Prevention of Child Abuse
- Military & First-Responder Support
- Disaster Relief & Recovery
- Youth
- · Homeless & Housing
- Health & Wellness

We do not endorse controversial, political, or specific religious organizations; however, we may consider causes associated with such groups, like clothing drives, school supply initiatives, or food drives.

Odyssey is also open to sponsoring various events, including golf tournaments, sporting events, scholarship programs, fundraising activities, and outreach opportunities.

The selection of charities and causes will prioritize those that provide broad, diverse services and do not discriminate against protected classes, ensuring they serve a wide array of individuals in need.

Odyssey primarily supports initiatives focusing on the following key areas of interest:



# Charon K Pacheco

Founded by Odyssey Owner, Leo Pacheco, in memory and honor of his mother, the SKP Foundation provides financial aid for military, youth, adult, education, and other programs.



Samaritan's Purse provides much needed physical and spiritual aid around the world, specifically to victims of war, poverty, natural disasters, diseases, and famine.



Aerial Recovery trains and deploys Humanitarian Special Operators to effectively respond to natural disasters, man-made disasters and combat sex trafficking. Made up of Veterans and First Responders from their Heal the Heroes Initiative, Aerial tackles some of the most difficult rescue and response missions across the globe.

# **IJJ** Wings

Wings Foundation supports adult survivors of childhood sexual abuse to transcend trauma and lead their fullest, healthiest lives.



Clear Choice Academies is a charter school organization based in Ocala, Florida. CCA owns and operates a middle and high school serving a diverse population of students.





American Military Family is a military support organization that aids in soldier suicide prevention. T2T helps America's heroes by providing mortgage-free homes to fallen first responders.



Forgotten Angels, based in Florida, provides homes, care, and life skills development for youth aging out of foster care.



Give Kids The World Village is an 89-acre, whimsical nonprofit resort in Kissimmee, Florida, that provides weeklong, cost-free wish vacations to critically ill children and their families from around the world who want to visit Central Florida.

# ODYSSEY SUPPORT SERVICES

# GAIN TIME FREEDOM WITH REDUCED SHARED EXPENSES

Navigating the 185+ steps of a real estate transaction can overwhelm solo agents, consuming precious time that could be spent prospecting, marketing, and managing clients. The sheer volume of tasks makes it challenging to grow your business efficiently.

As a valued partner with Odyssey Real Estate Services, you'll have a dedicated support team that frees up your valuable time, saves money, and enhances your opportunity to increase transaction volume. This support allows you to focus on what you do best—creating stellar client experiences and generating more business!

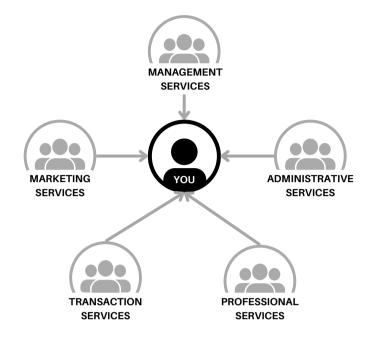
Our support services include:

# 01 | Management Services

- Training & Coaching
- Mentorship Program
- Compliance & Regulatory Oversight
- Availability 7 Days a Week

# 02 | Administrative & Field Services

- Sign and Lockbox Installation & Retrieval
- MLS Input & Updates
- Scheduling Coordination
- Answering Phones & Funneling Calls
- Event Planning



# 03 | Transaction Services

- Designated Transaction Coordinator
- Document & Timeline Management
- Communication Facilitation
- Coordination of Inspections & Appraisals
- Transaction Support
- Closing Preparation

# 04 | Marketing Services

- In-House Photographer
- · Branding & Design Center
- Website & Social Media Management
- Online Agent Store/Shop
- Partner Marketplace

### 05 | Professional Services

- Notary Public Service
- Legal Services
- Professional Stylist
- Financial & Estate Planner

# ODYSSEY PARTNER BENEFITS

# 01 | Launch Kit

- Business Cards
- Individual Sign Rider
- Nametag
- Planner
- Team Swag
- Buyer Presentation
- Listing Presentation
- Headshots

# 02 | Marketing Collateral

- Team Yard Signs w/ Personal Riders
- Custom Print and Digital Assets
- Social Media Posts
- Client eNewsletters
- Property Flyers
- Listing Photos w/ 360 Degree Tour & Floorplan

# 03 | Client Moving Kit

- Branded Moving Boxes
- Packing Tape and Bubble Wrap
- Markers and Labels
- Fireproof Security Bag for Important Documents
- HOME Essentials Kit
- Client Concierge

\*Access may be provided by a third-party at a discounted rate at partner expense or provided once partner reaches a specific level of productivity.





# 04 | Technology Tools

- CRM
- Learning Management System (LMS)
- Marketing Design Center
- Transaction Management
- Website

# 05 | Financial & Estate Plan

- Financial Planner
- Estate Planner
- Exit Strategy & Legacy Building

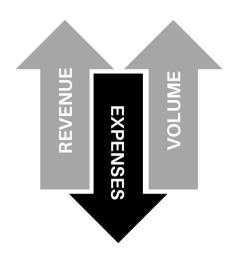
# 06 | Low-Cost Healthcare

- Medical | Dental | Vision | Life
- Mental Health
- Tele-Health
- Prescription Plan
- Wellness Program





# ORES FINANCIAL GROWTH MODEL



Odyssey Real Estate Services' (ORES) financial growth model is crafted to empower our team members by boosting revenue, cutting expenses, increasing transaction volumes, and setting the stage for financial success in real estate. This innovative plan offers a competitive structure with multiple revenue streams, providing stability during market fluctuations, offering retirement options with passive income, and supporting generational wealth and estate planning to build a lasting legacy.

# **INCREASED REVENUE**

Our innovative plan features a competitive structure that generates multiple revenue streams, ensuring stability during market fluctuations. It offers retirement options with passive income, supports generational wealth, and enables estate planning to build a lasting legacy.

# DECREASED OVERHEAD AND SHARED EXPENSES

By lowering overhead costs through shared expenses, our partners benefit from comprehensive services, including human resources, accounting, marketing, coaching, mentoring, business development, legal support, and more, significantly reducing out-of-pocket expenses.

# INCREASED TRANSACTION VOLUME

Our proven systems and extensive support services free up time for our partners, allowing them to focus on generating more business and creating a healthier work-life balance. This results in increased transaction volumes and ultimately higher earnings.

The value of your time

Ultimately, it is not just about earning a paycheck; it's about crafting a healthy work-life balance that empowers you to live the lifestyle you desire. Your time is just as valuable as your financial success. While money can always be earned, time is a precious, one-time currency that can never be regained. Our team's services and benefits are designed to help you not only showcase the value of your expertise but also honor the true worth of your time.

# ODYSSEY PARTNER REVENUE MODEL

# **Expanded Opportunities for Income, Savings, and Benefits**

Odyssey Real Estate Services offers our partners numerous ways to earn additional income, save money, and enjoy exclusive benefits beyond our core transactional sales model. These include compensation for property showings and open houses conducted on behalf of other team members, performance-based bonuses and incentives, annual family vacations, and more, paid for by Team Revenue, except where noted. This includes:

# **TOURS & OPEN HOUSES**

#### **ALL LEVELS EARN**

minimum of \$25 Per Showing or \$25 Per Hour for Open Houses (paid for by initiating agent w/in 24 hours)

#### **MENTORSHIP REV SHARE**

#### JUNIOR AND SENIOR PARTNERS EARN

1% of new Associate's gross earnings on first 3-5 transactions, when assigned.

# **DEDICATED ASSISTANT**

#### SENIOR PARTNERS EARN

a dedicated assistant to help manage transactions and administrative tasks.

#### ASSOCIATES & JR PARTNERS MAY EARN

additional income by serving as a dedicated assistant for Senior Partners.

# **AGENT REFERRAL BONUS**

# **ALL LEVELS EARN**

an agent referral bonus of \$100 for the first five (5) transactions of a personally referred agent who joins Odyssey.

# **BONUSES & INCENTIVES**

#### JUNIOR AND SENIOR PARTNERS EARN

additional bonuses and incentives based on transaction and sales volume.

# **LEAD REFERRAL FEES**

### **ALL LEVELS EARN**

referrals fees of 25% for external referrals and 30% for internal referrals.

# **VACATION BANK**

#### JUNIOR AND SENIOR PARTNERS EARN

\$250 per \$250k or higher transaction toward an annual paid vacation based on anniversary start date with Odyssey.

# ODYSSEY PARTNER EXPENSE MODEL

# **Operational Expenses and Profitability**

All businesses—from solo entrepreneurs to global corporations—must manage operational expenses, which include costs related to production, human resources, accounting, research and development, marketing, IT, legal compliance, and payroll. Known as "overhead" costs, these expenses are strategically minimized by effective leaders to maximize revenue, enhance profitability, and build owner equity. Our approach is centered on reducing these costs through collaboration, while maintaining high-quality service for our clients and partners.

Odyssey Real Estate Services helps to significantly lower your overhead and out-of-pocket expenses. Fees required by our associates and partners will be conveniently charged to the credit or debit card on file, following the outlined fee schedule.



ANNUAL FEES
TRAINING FEES
OFFICE FEES

# REQUIRED PARTNER FEES:

# TRANSACTION FEE\* | \$500 per transaction paid at closing

Transaction fees encompass compliance and regulatory requirements, including document management and storage, electronic service fees, and transaction management. These fees are the responsibility of the agent; however, agents have the option to pass the fee to the client as part of their contractual agreement or to split the cost with the client.

# E&O COVERAGE | \$50 per month or \$600 per year

Errors and Omissions Insurance (E&O) is a professional liability insurance that protects sales associates and the real estate firm from potential lawsuits related to negligence or errors. This fee is automatically billed to your credit or debit card on file, with the first payment processed within 24 hours of completing your onboarding paperwork.

# TECH FEE | \$150 one-time fee due at signing

A one-time tech fee is required to cover costs of setup, training, and installation of your technology tools, including your CRM, back-office, workspace, and website. Odyssey covers the monthly service fees after setup as part of the added benefits to you as an Associate/Partner.

# ADVANCEMENT AND COMPENSATION MODEL

Our compensation plan is designed to celebrate and amplify your success! We embrace a dynamic growth strategy that rewards your experience, skill, and expertise. With compensation tailored to your annual transaction and revenue volume, your hard work doesn't just pay off—it accelerates your journey to success and encourages your growth and advancement!

As your transaction volume and revenue grow, so do your rewards and incentives. Enjoy higher compensation, reduced shared expenses, and increased transaction opportunities, unlocking even greater benefits and incentives. Our mission is to help you build not just your business and brand, but also to elevate you to Senior Partner status, where you can achieve the ideal work-life balance and create the lifestyle of your choice without being a lone ranger.

# **ASSOCIATE**

Less than 10 closed transactions or \$3M in revenue in the previous year

# Earn 50% per Transaction

**INCLUDES** ALL of the Partner Services and Benefits:

- Leads
- Administrative Services
- Custom Marketing Services
- Field Services
- Legal Services
- Transaction Coordinator
- Tech Tools
- In-House Photographer
- Partner Launch Kit
- Signs & Lockboxes
- Coaching & Mentorship
- Advanced Training
- Sellers & Buyers Toolbox
- Annual Retreat

# **JUNIOR PARTNER**

11-20 closed transactions or \$3-7M in revenue in the previous year

# Earn 65% per Transaction

**INCLUDES** ALL of the Partner Services and Benefits, PLUS+:

- Bonuses & Incentives
- Vacation Bank
- Mentorship Rev Share
- Continuing Education (CE) Course
   Reimbursement

# **SENIOR PARTNER**

21+ closed transactions or over \$7M in revenue in the previous year

Earn 80% per Transaction

INCLUDES ALL of the Partner Services and Benefits, PLUS+:

- ALL Junior Level Benefits
- Dedicated VA
- Additional Marketing on Larger Platforms (Billboards, Digital Streaming, etc.)

# WE INVEST IN YOUR BUSINESS AND SUCCESS

UNRIVALED · UNPRECEDENTED UNPARALLELED · UNWAVERING REVOCULIONARY



\*Certain restrictions apply and are subject to change at the owner's discretion. In order to qualify for all the benefits and services, associates and partners are expected to meet and exceed annual transactional goals. Transactions are based on previous year from the agent's start date.

# **PARTNER** EARNING POTENTIAL

# MOST SOLO AGENTS (LONE RANGERS)

Home Sales Price: \$400.000 x Commission: 2.5%

= Gross (GCI): \$10,000

-Less Expenses: \$7,500

Avg. of 75%

=Net Income: \$2,500

x Avg. Sales: 5 / yr

= Annual Net Income: \$12,500

**Lower Commission Rate +** 

Higher Expenses +

Less Time Freedom + Average Volume =

# lower net income

# TOP PRODUCING PARTNERS

Home Sales Price: \$400.000

x Commission: 3%

= Gross (GCI): \$12,000

-Less Expenses: \$2,400

Avg. of 20%

=Net Income: \$9,600

x Avg. Sales: 30 / yr

= Annual Net Income: \$288,000

**Higher Commission Rate +** 

Lower Expenses +

More Time Freedom + Increased Volume =







		SOLO AGENT		ASSOCIATE		JUNIOR		SENIOR
Average Commission Rate		2.5%		3%		3%		3%
Aug Salas Drias	<b>\$ 400,000.00</b> \$	400,000,00	4	400,000,00	4	400,000,00	ć	400 000 00
Avg. Sales Price	\$ 400,000.00 \$	400,000.00	>	400,000.00	\$	400,000.00	>	400,000.00
Gross Commission Income (GCI)	\$	10,000.00	\$	12,000.00	\$	12,000.00	\$	12,000.00
Split Earnings		0%		50%		65%		80%
Net Commission Income (NCI)	\$	10,000.00	\$	6,000.00	\$	7,800.00	\$	9,600.00
Less: Operating Expenses		75%		50%		35%		20%
	\$	7,500.00	\$	6,000.00	\$	4,200.00	\$	2,400.00
Net Operating Income (NOI)	\$	2,500.00	\$	6,000.00	\$	7,800.00	\$	9,600.00
x Average Annual Transactions		5		10		20		30
Average Annual Income	\$	12.500.00	\$	60.000.00	\$	156.000.00	Ś	288.000.00

# TRANSACTIONAL COMPARISONS

	9	SOLO AGENT	ASSOCIATE	JUNIOR	SENIOR
Average Commission Rate		2.5%	3%	3%	3%
Net Operating Income (NOI)	\$	2,500.00	\$ 6,000.00	\$ 7,800.00	\$ 9,600.00
x Average Annual Transactions		5	10	20	30
Average Annual Income	\$	12,500.00	\$ 60,000.00	\$ 156,000.00	\$ 288,000.00



- You would only need about 2 transactions with Odyssey to break even as a 100% Solo Agent.
- Adding only ONE more transaction (total of 6), you would potentially earn \$36,000 vs. 5 transactions as a solo agent under the 100% commission model.
- Adding only ONE more transaction (total of 11), you would potentially earn \$25,800 more than you would at the Associate level.
- Adding only ONE more transaction (total of 21), you would potentially earn \$45,600 more than you would at the Junior Partner level.

# COMPARISONS

# 100% Commission

- Higher Initial Earning Potential
- Higher and/or More Fees
- Higher Business or Personal Expenses
- Full Responsibility and Risk
- Few or No Support Services
- Lack of Guidance or Mentorship
- Few or No Broker Resources
- Little to No Real Training
- Higher Operational Costs

# **Broker Splits**

- Lower Initial Earning Potential
- Lower and/or Fewer Fees
- Lower Business or Personal Expenses
- · Shared Responsibility and Lower Risk
- More Support Services Freeing up Your Time
- Mentorship | Coaching | Collaboration
- Tons of Broker Resources
- Extensive and Advanced Training
- Lower Operational Costs

# POLICIES & PROCEDURES



# REAL ESTATE FUNDAMENTALS

# LAYING THE FOUNDATION FOR SUCCESS

- Real Estate Refresh
- Licensing Essentials
- Mindset Mastery
- Mastering Communication and Presentation Skills
- Mastering Time Management and Productivity Hacks



# REAL ESTATE REFRESH

# **Maintaining Compliance and Staying Current**

Odyssey Associates and Partners are highly encouraged to attend all training sessions and register for continuing education (CE) courses offered through the local and national associations or other real estate providers approved through the State. Staying current with the latest laws, trends, and best practices will help you adapt to changing markets, industry standards, and licensure requirements.

Here are a few important resources to help you stay refreshed, updated, and informed:

### 01 | FLORIDA CORE LAW

- FREC Rules
- Agency Law and Fiduciary Duties
- Laws Affecting Real Estate
- 3 Hours of Required CE every renewal cycle

# 03 | POST-LICENSURE

- 45 Hours for Sales Associates by end of first renewal period.
- 60 Hours for Brokers by end of first renewal period.

# 02 | CODE OF ETHICS TRAINING

- Required every 3 years
- REALTORS® are required to complete not less than 2 hours, 30 minutes of instructional time

# 04 | CONTINUING EDUCATION (CE)

• Requires 14 hours of approved CE courses

# **ADVERTISING GUIDELINES**

Real estate advertisements must be accurate, truthful, and free from misleading statements or factual errors. Avoid making claims that cannot be substantiated. For example, it's not possible to confirm a statement like, "This home is in a neighborhood that will appreciate at twice the rate of surrounding areas."

Deceptive advertising can be as straightforward—and as common—as improperly using the REALTOR® designation if you are not a member of the National Association of REALTORS®. Here are some other frequent advertising mistakes in real estate:

- Listing total square footage as living area when it includes non-living spaces
- Using a team or group name when there are no actual team members
- · Advertising a "new air conditioner" when only the compressor or coils were replaced, not both
- Marketing a property as waterfront when it only has a small man-made pond
- Failing to update the Seller's Property Disclosure after renovations or repairs are made post-listing

Reminder: Outdated information is inaccurate information. Keep online listing details and their sources current. The public relies on the accuracy of online listings, so all forms of advertising or marketing must reflect true and up-to-date information.

# AGENCY RELATIONSHIPS

# **TERMINOLOGY**



#### **AGENCY**

The professional relationship between a real estate agent and the individual(s) they represent.

#### **FIDUCIARY**

An agent who acts on behalf of a client at the client's request and in their best interest.

#### **CUSTOMER/CLIENT**

A customer has no formal contract or established relationship. A client has a formal contract or established relationship.

# **ESTABLISHING AGENCY AGREEMENTS & COMPENSATION**



Agency agreements define the professional real estate services provided in exchange for compensation.

### **Types of Representation:**

- Exclusive Representation: The client commits to working with one broker.
- Non-Exclusive Representation: The client may work with multiple brokers.

# **Compensation and Agency Status:**

- Compensation does not determine agency.
- Florida Statute 475.255 states that payment or a promise to pay does not establish an agency relationship.
- Commissions are split between the brokerage and the sales agent or are authorized for direct payment through a Commission Disbursement Authorization (CDA) at closing.

# **COMPENSATION RULES & REFERRAL FEES**



#### **Broker Controls Compensation:**

• All real estate-related compensation must be processed through the broker.

#### **Restriction on Undisclosed Payments:**

- Agents may **not** receive undisclosed compensation from any party involved in the transaction.
- Referral fees from mortgage brokers, title representatives, or other service providers are **not** permitted under RESPA (Real Estate Settlement Procedures Act).

### **Allowed Referral Fees:**

 Agents may give or receive referral fees to and from other agents, but all such transactions must be disclosed.

#### **Incentives and Rebates:**

- Florida law allows agents to offer rebates or incentives (e.g., cash-back rebates, closing cost assistance, or gift cards) to buyers and sellers, provided they are fully disclosed and documented in writing.
- Any rebates or incentives must also receive lender approval if the buyer is obtaining financing, as they
  may affect loan terms.

# COMPENSATION RULES & REFERRAL FEES CONTINUED



#### Gifts and Promotions:

• Agents may provide non-monetary gifts or promotional items as part of marketing efforts, as long as the value is **reasonable** and **not tied to referrals or contingent transactions**.

# What is considered "reasonable?"

The term "reasonable" in this context typically refers to the value of gifts or promotional items being modest and proportionate to customary marketing practices. While no specific dollar amount is defined under Florida Statutes or RESPA, a general guideline is:

- Small items like branded pens, calendars, or mugs are generally acceptable.
- Gift cards or vouchers under \$25-\$50 are often viewed as reasonable for promotional giveaways.
- Larger gifts or cash equivalents may be scrutinized and potentially violate RESPA if perceived as an inducement tied to a referral or contingent transaction.

Key Principle: The gift must not create an expectation of business referrals or preferential treatment and must be disclosed if it relates to a transaction.

#### **RELATIONSHIP LIMITATIONS & STANDARDS**



### Impact of Representation on Relationships:

• An agent's relationship with one party (buyer or seller) affects the type of relationship other firm members may have with the other party.

### **Permitted Relationship Combinations:**

- Agents in a transaction brokerage relationship with a seller may have either:
  - A transaction brokerage relationship, or a non-representation relationship with the buyer.
- Agents in a single agency relationship with a seller may have only a non-representation relationship with the buyer.

# **ODYSSEY REAL ESTATE SERVICES STANDARD:**

While brokerages may select which services they provide from an agency standpoint, Odyssey typically provides **EXCLUSIVE ONLY Transaction Broker** and **Single Agent** Services.

Use the Broker Relationship Disclosure (BRD) for Transaction Broker and the Exclusive Buyer Brokerage Agreement - Transaction Broker (Form EBBA-7tb) or Exclusive Right of Sale Listing Agreement - Transaction Broker (Form ERS-20tb), found in either Form Simplicity or in our Transaction Management System.

For Single Agent representation, use the BRD for Single Agent Notice and the Exclusive Buyer Broker Agreement - Single Agent (Form EBBA-7sa) or Exclusive Right of Sale Listing Agreement - Single Agent (ERS-19sa)

# AGENCY DUTIES OWED

NON-REPRESENTATION	TRANSACTION BROKER	SINGLE AGENT		
		Loyalty		
		Obedience		
	Complete Duties as Agreed	Full Disclosure		
	Limited Confidentiality	Confidentiality		
	Use Skill, Care, and Diligence			
	Present All Offers in	n a Timely Manner		
Account for All Funds				
Disclose Material Facts				
Deal Honestly and Fairly				

# TRANSACTION BROKER VS DUAL AGENCY



- **Dual Agency** is when an agent acts as an agent for both the buyer and seller. In Florida, this is prohibited because it's not possible for a single agent to act in the best interests of both parties simultaneously. This also holds true for other agents of the Firm, each representing both parties of a transaction
- **Transaction Broker** is the presumed form of agency, unless otherwise agreed upon. As a Transaction Broker the agent is committed to the transaction (deal) rather than either the buyer or the seller, resulting in a limited form of nonfiduciary representation, and must be disclosed to the client at signing.

# APPLIES TO RESIDENTIAL SALES ONLY



#### Residential Sale includes:

- Improved residential property of four units or fewer
- Unimproved residential property intended for use of four units or fewer
- Agricultural property of 10 acres or fewer
- Odyssey uses Florida Realtors Form EBBA-7tb for Buyers and ERS-20tb for Sellers
- Properties of five units or more are considered "commercial."



# TRANSACTION BROKER NOTICE

FLORIDA LAW PRESUMES THAT ALL LICENSEES ARE OPERATING AS TRANSACTION BROKERS unless a single agent or no brokerage relationship is established in writing. As a transaction broker, Odyssey Real Estate Services LLC and its associates owe to you a limited form of representation including the following duties:

- · Dealing honestly and fairly
- · Accounting for all funds
- Using skill, care, and diligence in the transaction
- Presenting all offers and counteroffers in a timely manner, unless a party has previously directed the licensee otherwise in writing
- Disclosing all known facts that materially affect the value of residential real property and are not readily observable
- Limited confidentiality, unless waived in writing by a party. This limited confidentiality will
  prevent disclosure that the seller will accept a price less than the asking or listed price,
  that the buyer will pay a price greater than the price submitted in a written offer, of the
  motivation of any party for selling or buying property, that a seller or buyer will agree to
  financing terms other than those offered, or of any other information requested by a party
  to remain confidential
- Any additional duties that are mutually agreed to with a party

Limited representation means that a buyer or seller is not responsible for the acts of the licensee. Additionally, parties are giving up their rights to the undivided loyalty of the licensee. This aspect of limited representation allows a licensee to facilitate a real estate transaction by assisting both the buyer and the seller, but a licensee will not work to represent one party to the detriment of the other party when acting as a transaction broker to both parties.

BUYER OR SELLER SIGNS BELOW FOR THE SOLE PURPOSE OF ACKNOWLEDGING RECEIPT OF THIS DISCLOSURE NOTICE:

Print Name	Signature	Date		
Print Name	 Signature	 		



# SINGLE AGENT NOTICE

FLORIDA LAW REQUIRES THAT REAL ESTATE LICENSEES OPERATING AS SINGLE AGENTS DISCLOSE TO BUYERS AND SELLERS THEIR DUTIES. As a single agent, Odyssey Real Estate Services LLC and its associates owe to you the following duties:

- · Dealing honestly and fairly
- Loyalty
- · Confidentiality
- Obedience
- · Full disclosure
- Accounting for all funds
- · Skill, care, and diligence in the transaction
- Presenting all offers and counteroffers in a timely manner, unless a party has previously directed the licensee otherwise in writing
- Disclosing all known facts that materially affect the value of residential real property and are not readily observable

#### **ACKNOWLEDGMENT:**

This form sets forth the disclosure notices required by Florida law to be given by a real estate broker to all buyers and/or sellers with whom the broker engages in a single agency brokerage relationship. This form does not establish the terms of any agency or brokerage relationship agreement between the broker and buyer or seller. BUYER OR SELLER SIGNS BELOW FOR THE SOLE PURPOSE OF ACKNOWLEDGING RECEIPT OF THIS DISCLOSURE NOTICE:

Print Name	Signature	Date
Print Name	Signature	Date



# CONSENT TO TRANSITION TO TRANSACTION BROKER NOTICE

FLORIDA LAW ALLOWS REAL ESTATE LICENSEES WHO REPRESENT A BUYER OR SELLER AS A SINGLE AGENT TO CHANGE FROM A SINGLE AGENT RELATIONSHIP TO A TRANSACTION BROKERAGE RELATIONSHIP IN ORDER FOR THE LICENSEE TO ASSIST BOTH PARTIES IN A REAL ESTATE TRANSACTION BY PROVIDING A LIMITED FORM OF REPRESENTATION TO BOTH THE BUYER AND THE SELLER. THIS CHANGE IN RELATIONSHIP CANNOT OCCUR WITHOUT YOUR PRIOR WRITTEN CONSENT. As a transaction broker, Odyssey Real Estate Services LLC and its associates, provide to you a limited form of representation that includes the following duties:

- · Dealing honestly and fairly
- · Accounting for all funds
- · Using skill, care, and diligence in the transaction
- Disclosing all known facts that materially affect the value of residential real property and are not readily observable
- Presenting all offers and counteroffers in a timely manner, unless a party has previously directed the licensee otherwise in writing
- Limited confidentiality, unless waived in writing by a party. This limited confidentiality will
  prevent disclosure that the seller will accept a price less than the asking or listed price,
  that the buyer will pay a price greater than the price submitted in a written offer, of the
  motivation of any party for selling or buying property, that a seller or buyer will agree to
  financing terms other than those offered, or of any other information requested by a party
  to remain confidential
- Any additional duties that are entered into by this or by separate written agreement

Limited representation means that a buyer or seller is not responsible for the acts of the licensee. Additionally, parties are giving up their rights to the undivided loyalty of the licensee. This aspect of limited representation allows a licensee to facilitate a real estate transaction by assisting both the buyer and the seller, but a licensee will not work to represent one party to the detriment of the other party when acting as a transaction broker to both parties.

By signing below, I/we agi	ree that my agent may assume the role ar	nd duties of a transaction broker.
Print Name	Signature	Date
Print Name	 Signature	 Date



# NO BROKERAGE RELATIONSHIP NOTICE

FLORIDA LAW REQUIRES THAT REAL ESTATE LICENSEES WHO HAVE NO BROKERAGE RELATIONSHIP WITH A POTENTIAL SELLER OR BUYER DISCLOSE THEIR DUTIES TO SELLERS AND BUYERS. As a real estate licensee who has not brokerage relationship with you, Odyssey Real Estate Services LLC, and its associates owe to you the following duties:

- · Dealing honestly and fairly
- · Accounting for all funds
- Disclosing all known facts that materially affect the value of residential real property and are not readily observable

### **ACKNOWLEDGMENT:**

This form sets forth the disclosure notices required by Florida law to be given by a real estate broker to all buyers and/or sellers with whom the broker engages in non-brokerage relationship. This form does not establish the terms of any agency or brokerage relationship agreement between the broker and buyer or seller. BUYER OR SELLER SIGNS BELOW FOR THE SOLE PURPOSE OF ACKNOWLEDGING RECEIPT OF THIS DISCLOSURE NOTICE:

Print Name	Signature	Date				
Print Name	Signature	 Date				

# NAR CODE OF ETHICS

Odyssey Real Estate Services upholds the rigorous Code of Ethics (COE) established by the National Association of REALTORS® (NAR)—a standard first adopted in 1913 and continuously updated to reflect the evolving real estate landscape. In Florida, all real estate agents and brokers must complete and pass a COE course as part of their license renewal process. This Code serves as a cornerstone of the industry, promoting professionalism, integrity, and trust in every transaction.

# SUMMARY OF THE COE

# **DUTIES TO CLIENTS & CUSTOMERS**

# **ARTICLE 1 - LOYALTY TO CLIENTS**

- REALTORS® must prioritize client interests while maintaining honesty with all parties.
- Includes disclosure of representation, submission of offers, and confidentiality of client information.

#### ARTICLE 2 - AVOIDING MISREPRESENTATION

 REALTORS® must not exaggerate, misrepresent, or conceal material facts about a property.

# ARTICLE 3 - COOPERATION WITH BROKERS

 Requires REALTORS® to cooperate with other brokers unless it is against the client's best interests.

# ARTICLE 4 - DISCLOSURE OF PERSONAL INTERESTS

 REALTORS® must disclose any ownership interest they have in properties they sell or lease.

# ARTICLE 5 - AVOIDING CONFLICTS OF INTEREST

 REALTORS® must disclose any financial interests in transactions they are involved in.

# ARTICLE 6 - NO UNDISCLOSED COMPENSATION

 Prohibits undisclosed commissions, rebates, or profits from client-related expenses.

# ARTICLE 7 - DISCLOSURE OF MULTIPLE COMPENSATION

 REALTORS® must inform all parties before accepting compensation from more than one party in a transaction.

# ARTICLE 8 - PROPER HANDLING OF CLIENT FUNDS

Client funds must be held in a separate trust account.

# ARTICLE 9 - CLEAR AND WRITTEN AGREEMENTS

 All agreements related to real estate transactions should be in writing and clearly outlined.

### NAR

### CODE OF ETHICS CONT'D

### **DUTIES TO THE PUBLIC**

### ARTICLE 10 - NO DISCRIMINATION

 REALTORS® must provide equal services regardless of race, color, religion, sex, disability, familial status, national origin, sexual orientation, or gender identity.

### ARTICLE 11 - COMPETENCE IN SERVICES

 REALTORS® should only provide services within their expertise and must engage professionals when needed.

#### **ARTICLE 12 - HONEST ADVERTISING**

 REALTORS® must ensure truthful advertising and clearly identify themselves as real estate professionals.

### ARTICLE 13 - NO UNAUTHORIZED LEGAL PRACTICE

 REALTORS® must not provide legal services and should refer clients to legal professionals when necessary.

### ARTICLE 14 - COOPERATION WITH ETHICS INVESTIGATIONS

• REALTORS® must fully cooperate in ethics proceedings and disciplinary investigations.

### **DUTIES TO OTHER REALTORS**

### ARTICLE 15 - NO FALSE OR MISLEADING STATEMENTS

 REALTORS® must not make false or misleading statements about other professionals or their business practices.

### ARTICLE 16 - RESPECTING EXCLUSIVE AGREEMENTS

 REALTORS® should not interfere with exclusive representation agreements held by other REALTORS®.

### **ARTICLE 17 - ARBITRATION OF DISPUTES**

• REALTORS® must resolve disputes through mediation or arbitration rather than litigation.

### MINDSET MASTERY



### MOTIVATIONAL MINUTE

Knowledge is of no value unless you put it into practice.

- Anton Chekhov | Russian Playwright

Success is no accident. It is hard work, perseverance, learning, studying, sacrifice, and most of all, love of what you are doing.

Pele | Famous Soccer Player

Practice like you've never won. Perform like you've never lost.

Unknown

The more you sweat in practice, The less you bleed in battle.

Richard Marcinko | Navy Officer and Author

Success is the sum of small efforts repeated day in and day out.

Robert Collier | Author

Practicing the basics is the foundation for mastering the extraordinary.

Greg LeMond | Former Cyclist

Nobody is ever good when they first start. Practice puts knowledge into action, and turns good into great and great into extraordinary!

Leo Pacheco | Broker Extraordinaire

### MASTERING YOUR MINDSET

### From Real Estate Agent to CEO: Building Your Own Brand and Business

In the dynamic world of real estate, a profound transformation happens when you shift from an employee mindset to embracing the role of the CEO of your own brand. As a real estate agent, you're not just facilitating property transactions; you're building a business, crafting a legacy, and setting the foundation for your future success. The journey begins with managing your mindset—recognizing that you're not just an employee following directions but a business owner making strategic decisions. This shift empowers you to take control, define your vision, and shape your narrative. By adopting this ownership mentality, you elevate your career and unlock the boundless potential of being both a real estate professional and an entrepreneur.



### Set Clear Goals and Vision!

Define what success looks like for you. Set specific, measurable, achievable, relevant, and time-bound (SMART) goals, and create a vision for where you want to be in the future.

S	SPECIFIC	Clearly state your goal.
M	MEASURABLE	Ensure you can measure success.
Α	ATTAINABLE	Set realistic goals.
R	RELEVANT	Ensure your goals align with your vision.
Т	TIME-BASED	Set deadlines for achieving goals.



### **Embrace a Growth Mindset for Success!**

Believe in your ability to learn and grow. View challenges as opportunities for growth, and be receptive to feedback and new ideas. Continuously seek new knowledge and skills to enhance yourself, your business practices, customer service, and personal development. The journey of self-improvement is ongoing and vital for long-term success. Build confidence by trusting in your abilities and decisions. Celebrate your achievements, no matter how small, and learn from your mistakes without dwelling on them. Avoid ego! Be confident, not arrogant.

ARROGANCE

EGO | Ego is a person's sense of self-importance or esteem. Arrogance is an inflated sense of self-importance.

CONFIDENCE Confidence is assurance in one's ability based on expertise.



### Cultivate Resilience by Overcoming Set Backs and Envisioning Success!

Understand that setbacks are a natural part of the journey. Develop the resilience to bounce back from failures and stay committed to your goals, even when faced with challenges. Maintain a positive outlook by practicing gratitude and focusing on the positives in your life, which helps sustain motivation and a constructive mindset. Regularly visualize yourself achieving your goals; this mental practice can boost confidence and reinforce your dedication to your vision.

### Prioritize Self-Discipline and Effective Time-Management!

As the CEO of your brand, effective time management and self-discipline are crucial. Life is full of distractions, and while some are unavoidable (children, pets, emergencies, etc.), establishing routines and systems can help you stay organized and focused. Implement time blocks to set boundaries and stay on track, ensuring you work toward creating your ideal life and achieving success. Remember, distractions can derail your progress, so stay vigilant and disciplined.

### **Sir Winston Churchill**

You will never reach your destination if you stop and throw stones at every dog that barks.

### **Robin Sharma**

Don't confuse activity with productivity. Many people are simply busy being busy.

### Remove Yourself from Toxic Environments and Surround Yourself with Positive, Productive People!

Seek out mentors, peers, and communities that inspire and support your growth. Minimize exposure to negative influences that can hinder your progress. This includes cultivating a positive environment by practicing gratitude, kindness, support, and encouragement. Although never completely avoidable, limit your intake of negativity by refusing to participate in gossip, bad judgement (drinking, partying, drugs, pornography, egotistical narcissists, and other toxic environments or relationships. If they aren't building you up and keeping you ontrack, then remove them from your sphere - this includes family members!



### Master Your Mindset and Outshine Your Competition!

In the competitive world of real estate, standing out is crucial, yet it's essential to approach this with a sense of camaraderie and professionalism. Identifying your competition begins with understanding the local market and staying informed about their strategies and successes. Cultivating your unique strengths—whether it's exceptional customer service, deep market knowledge, or innovative marketing techniques—can set you apart. *Rather than viewing your peers as adversaries, consider them as benchmarks to help elevate your own game*. Focus on consistently delivering value, building genuine relationships, and maintaining a positive reputation. By doing so, you can not only outshine the competition but also contribute to a thriving and collaborative industry environment.



### 1 | CRAFT YOUR CLIENT-FACING TITLE?

### **EXAMPLES:**

- Real Estate Consultant
- Elite Real Estate Advisor
- Premier Property Specialist

#### **NOTES**

### KEY CHARACTERISTICS OF AN ENTREPRENEUR

### 01 | Visionary

Able to see opportunities and potential where others see challenges or risks.

### 04 | Risk-Tolerant

Takes calculated risks and embraces uncertainty when others avoid them.

### 07 | Leader

Inspires, motivates, and guides others towards a common goal.

### 10 | Confident

Believes in one's abilities and vision, even in the face of doubt from others.

### 13 | Ethical

Adheres to a strong code of conduct for their behaviors to ensure integrity, honesty, and trust.

### 16 | Accountable

Reliable, meets deadlines, and takes ownership for their actions and outcomes.

### 02 | Resilient

Recovers quickly from setbacks and maintains a positive attitude.

### 05 | Innovative

Constantly seeks new and creative ways to solve problems and find solutions.

### 08 | Decisive

Makes quick, informed decisions and takes action with confidence.

### 11 | Passionate

Deeply enthusiastic and committed to their business or project.

### 14 | Client Focused

Strongly focuses on understanding and meeting client needs.

### 17 | Relational

Connects easily with others by leading with relationship building.

### 03 | Self-Motivated

Drives to pursue goals without needing external encouragement.

### 06 | Strong Work Ethic

Committed to putting in the necessary effort and hours to achieve success.

### 09 | Adaptabile

Flexibly adjusts strategies in response to changing circumstances.

### 12 | Coachable

Eager to acquire new skills, knowledge, and experience.

### 15 | Resourceful

Able to find quick solutions and cleaver ways to overcome obstacles.

### 15 | Professional

Maintains an image that presents themselves in a manner worthy of respect and trust.

# ROADBLOCKS TO SUCCESS

### Fear of Failure

Anxiety created by fear of making mistakes or being ridiculed.

### **Negative Mindset**

Persistent pessimism and negativity or egotistical behavior.

### **Fear of Change**

Resistance to change or stepping out of one's comfort zone.

### **Lack of Support**

Lacking a strong support system to help maintain motivation and reduce load.

### **Financial Constraints**

Limited financial resources or poor money management that prevents one from investing in self or business.

### Complacency

Becoming to comfortable or satisfied to make change or achieve greater things.

### **Lack of Clarity**

Inability to focus, stay motivated, or lacking direction and purpose.

### **Poor Time Management**

Inefficient use of time and lack of productivity in exchange for non-productive busyness.

### **Poor Planning**

Lacking structure.

### Perfectionism

Desire to achieve perfection that leads to wasted time on small, ineffective details.

#### **Health Issues**

Physical or mental health challenges that drain energy, focus, and motivation.

#### **Low Confidence**

Self-doubt and an inferior complex often making one feel intimidated or unqualified.

### **Procrastination**

Delaying necessary tasks or putting off decisions due to lack of interest.

### Undisciplined

Failing to maintain consistent work habits.

### Overcommitment

Taking on too many responsibilities that decrease quality of work.

### Fear of Rejection

Inability to take risks due to fear of criticism or rejection.

### **Personal Issues**

Personal conflicts, unresolved trauma, or emotional baggage.

#### Uncoachable

Filled with ego and unwillingness to learn from others.

### **OVERCOMING** FFAR

Change is an inevitable part of life and growth, yet it often brings with it a natural resistance and fear. Whether it's a career shift, personal transformation, or adapting to new technologies, the fear of change can paralyze us and prevent us from seizing opportunities. However, overcoming this fear is essential for personal and professional development. Let's explore why we fear change, the benefits of embracing it, and provide actionable steps to meet change head-on with successful outcomes.



The fear of change is a common psychological response rooted in the desire for stability and predictability. It often stems from:

- Fear of the Unknown:
  - Uncertainty about the future or the outcome can create anxiety.
- Fear of Failure, Criticism, or Rejection: The potential for failure or the appearance of failure can be intimidating.
- **Loss of Control:** Unexpected change can give us a sense of losing control.
- **Loss of Comfort:** Unfamiliar routines and environments often bring discomfort.

benefits of embracing change

- **Personal Growth:** 
  - Change often forces us to adapts and learn, fostering growth and development.
- **New Opportunities:** Embracing change can open doors to new experiences and opportunities.
- Resilience: Navigating change builds resilience, making it easier to adapt to future challenges.
- **Innovation and Creativity:** Change encourages us to think differently, using creative skills and innovative tools to navigate change effectively.

# 8 STEPS TO CONQUERING FEAR

### 01 | Acknowledge Your Fear

Acknowledge your fear. Accept that it's normal to feel apprehensive about change. Reduce the power of fear over you by writing down the positives (benefits) and negatives (pain) of change. You may discover the benefits outweigh the pain.

### 03 | Create an Action Plan

By setting SMART goals, defining what you want to achieve with the change, can help provide you with direction. Break down the steps by creating an actionable plan that outlines small, achievable tasks to avoid feeling overwhelmed.

### 05 | Embrace a Growth Mindset

Adopt the belief that you can grown and learn from new experiences. View change and challenges as opportunities to develop new skills, knowledge, and expertise through change.

### 07 | Be Patient

While change can be sudden, spontaneous, and unexpected, most change is a process that will take time to adapt and adjust to. Be patient and allow yourself time to transition.

### 02 | Educate Yourself

Knowledge can dispel fear. Research the change you're facing and gather as much information as possible. Understanding the potential outcomes and processes involved can alleviate anxiety and help you navigate change with confidence instead of fear.

### 04 | Develop a Support System

Surround yourself with supportive family, friends, and colleagues that will advise, encourage, and offer an outsider's perspective during times of change. This can help relieve you of loneliness and anxiety as you navigate change.

### 06 | Practice Self-Care

Change can be stressful and emotional.
Prioritize self-care by maintaining a healthy
lifestyle, getting enough sleep, setting
healthy boundaries, and engaging in
activities that relax and rejuvenate you such
as prayer, massage therapy, exercise, etc.

### 08 | Reflect and Learn

After experiencing change, take time to reflect on what you've learned and how you've grown. This reflection can build confidence and prepare you for future changes.

"I have not failed. I have successfully found 10,000 ways that won't work."

Thomas Edison

"The difference between winning and losing is most often not quitting."

Walt Disc

# CONQUERING FEAR WORKSHEET

### 1 | ACKNOWLEDGE YOUR FEAR

I   ACKNOWLEDGE FOUR FEAR				
Identify Your Fear: What specific change or challenge are you facing?  Example: Changing new brokerages, moving to a new city, finding success in real estate				
My fear is:				
How does this fear manifest? Example: anxiety, procrastination, self-doubt, sleeplessness	Why am I feeling this fear? Example: fear of failure, rejection, the unknown, losing security			
My reactions:	My reasons:			
2   INVESTIGATE AND EDUCATE				
Research the Change: What information can I gather to help ease my fear?  Example: industry trends, company history, feedback from others, success data, marketing, benefits,				
My research:				
What questions do I need answered to help ease my fear?  Example: what tools and resources are available, how good are schools for my kids				
My questions:				
What are the potential positive outcomes?  Example: career growth, more support, financial stability  What are the potential negative outcomes?  Example: stress of move, lack of support, failure				
How does this knowledge impact my fear?  Example: reduces my anxiety, makes the unknown less fearful				
My insight:				



S	SPECIFIC	Clearly state your goal.
M	MEASURABLE	Ensure you can measure success.
Α	ATTAINABLE	Set realistic goals.
R	RELEVANT	Ensure your goals align with your vision.
Т	TIME-BASED	Set deadlines for achieving goals.

### 3 | CREATE AN ACTION PLAN

### What is one SMART goal I wish to achieve?

Example: Move to Orlando, Join Odyssey Real Estate Services, Become financially independent, Have three children, Buy a Mercedes

My goal is:

### What is steps will I take to achieve this goal?

Example: schedule informative interviews, get four quotes, research options, collect data...

My action steps are:

- 1.
- 2.
- 3.

### What is my timeline for completing these steps?

Example: within the next 3 months, by end-of-year, 14 days...

My deadline is:

### Here is my narrative?

### Example:

I want to lose 30 pounds in the next 12 months by working with a personal coach and nutritional therapist, starting July 14 through July 13 of next year. I will measure my progress every 3 months, with the goal of losing at least 7-8 pounds per quarter.

I want to:			



### 4 | DEVELOP MY SUPPORT SYSTEM

List the top 3-5 people I can rely upon for advice, encouragement, and support
1.
2.
3.
4.
5.
How will I engage with them? (regular check-ins, seek advice, join support groups)
My plan is:
5   GROWTH MINDSET
How will this change help me grow or develop new skills?  Example: improve presentation skills, learn a new language, expand my network, manage time better
What beliefs will I adopt to embrace change and conquer fear?  Example: change brings opportunities, I am capable of overcoming challenges, I will succeed
How will I apply this mindset to overcome the challenges and conquer fear?  Example: take a class, attend workshops, get a mentor or coach, read books on mastery

"What's important is action. You don't have to wait to be confident. Just do it, and eventually, the confidence will follow."



### 6 | PRACTICE SELF-CARE

What activities will help me relax, recharge, and maintain a healthy work-life balance?  Example: exercise, prayer and meditation, hobbies, time in nature, family recreation, vacation, retreat
How can I ensure I don't overextend myself by setting healthy boundaries?  Example: saying "no" to extra commitments that distract me from my goals, scheduling downtime, limiting work time
How will I incorporate self-care into my daily routine?  Example: regular massage therapy sessions, morning devotionals or prayer time, evening workouts or walks
7   PRACTICING PATIENCE
What aspects of the change will take time?  Example: learning curve, making new friends, settling in new environment, losing weight steadily
How will I be kind to myself during this period?  Example: giving myself room to make mistakes, taking breaks when feeling overwhelmed, enjoying time to recharge
How will I monitor my adaptability to change or overcome my fear over time?  Example: journaling my experiences, weekly reflection on achievements, accomplishment of my goals



### 8 | REFLECTION

What have I learned from this change?

Example: new skills, personal growth, insights into my strengths and weaknesses...

My lessons:

How have I grown as a result of this experience?

Example: greater resilience, improved communication skills, increased confidence, set healthier boundaries...

My growth:

How will these lessons prepare me for future changes and fears?

Example: ability to apply learned strategies, embracing new opportunities, expanding my horizons and thinking...

My future:

Change is inevitable, but by following these steps, you can turn fear into a powerful ally, transforming challenges into stepping stones for personal and professional growth. Use this worksheet as your secret weapon whenever you face the unknown, empowering you to navigate change with resilience and vision.

With this guide, you'll set SMART goals to conquer your fears, master change, and triumph over the villains that stand in your way.

### PRO TIP:

When you feel you failed, give yourself a ONE-minute mourning period, then move on.



"Courage is the power of the mind to overcome fear."

Martin Luther King Jr.

"Inaction breeds doubt and fear. Action breeds confidence and courage." Dale Carnegie

"For God has not given us a spirit of fear, but of power and of love and of a sound mind."



# MASTERING COMMUNICATION



### UNDERSTANDING COMMUNICATION

Effective communication is the cornerstone of successful relationships, whether in personal life or professional settings. By honing your communication skills, you can build stronger connections, resolve conflicts more efficiently, and lead with greater influence. This guide will walk you through the key aspects of effective communication and provide a worksheet to help you practice and master these skills.

### STATISTICS

### 70%

of people believe wasted time is one of the consequences of poor communication.

#### PUMBLE.COM

### 86%

of employees and executives cite the lack of effective communication as the main causes of workplace failures.

#### PUMBLE.COM

### 70%

of dissatisfied sellers blame their agents for lack of communication

#### FOX BUSINESS

### THREE COMPONENTS OF COMMUNICATION

Communication is more than just exchanging words; it's about conveying ideas, emotions, and intentions clearly and accurately. It involves three primary components:

### **VERBAL**



Vocal the words you speak and tone of voice

### NON-VERBAL



Visual your body language and facial expressions

### **LISTENING-**



#### **Auditory**

how well you understand and process messages

### ------COMMON COMMUNICATION BARRIERS

### >>> ASSUMPTIONS & MISUNDERSTANDINGS < < < -

Avoid making assumptions about the other person's intentions or what they know. **ASSUME** | Make an **A\$\$** our of **U** and **ME** by creating misunderstandings.

### >>>> INFORMATION OVERLOAD <<<< =

Although the human brain can process a ton of information, it can only consciously process small bits at a time before it becomes paralyzed by "information overload."

It's like drinking water from a firehose - too much at one time to effectively consume.

#### ->>> LANGUAGE BARRIERS <<<< -

Be aware of language and cultural differences that may affect understanding. Sometimes words in our native language don't effectively translate to others well or mean something completely different in their language. American "football" is a different sport than "futbol" in South America, which we call "soccer."



exercise

### THE 5-MINUTE PAGEANT-STYLE INTERVIEW

Welcome to the Mr and Ms Odyssey Pageant. Today, our panel of judges will be asking insightful, engaging, and provocative questions to learn more about you as a contestant for the crown and prestigious title of Mr or Ms Odyssey!



**Judges:** Select three questions each from the list below to ask your contestant. If another judge asks the question first, you will need to select another question so the same question is not asked twice. However, if you a question is asked and you don't like the answer or you want the candidate to elaborate, clarify, or provide more details, you may do so without having to select another question. The ultimate goal is to learn more about your contestant's personality, style, habits, and ability to respond under pressure, which enhances communication skills for both judges and contestants.

- What personal value or principle do you hold most dear, and how does it influence your daily decisions?
- Can you share a moment in your life that significantly shaped who you are today?
- What motivates you to keep going when things get tough, both personally and professionally?
- If you could go back and give your younger self one piece of advice, what would it be and why?
- How do you define success, and has that definition evolved over time?
- If you could change one thing about your current life, without any limitations, what would it be and why?
- What is a commonly held belief or opinion that you disagree with, and why?
- Describe a time when you took a risk, and what did you learn from the experience?
- What is the most challenging conversation you've ever had, and what did it teach you about communication?
- How do you handle moments when you feel misunderstood or not heard?
- If your life was a book, what would this chapter be called, and why?
- What is one question you wish people would ask you, but they never do?



- If you could have a conversation with anyone, living or dead, who would it be and what would you talk about?
- What's something about you that most people would be surprised to learn?
- If you could master one new skill instantly, what would it be and how would it impact your life?
- How do you recharge or find balance when life feels overwhelming?
- What role do relationships and community play in your personal and professional growth?
- What's a goal or dream that you've yet to pursue, and what's holding you back?
- How do you define authenticity, and how do you strive to live authentically?
- What legacy do you hope to leave behind, both in your career and personal life?
- If a movie was made about your life, what would it be titled and who would play you?
- Describe one regret about your life that you wish you could change.
- If you became a millionaire, what would you do with your money?
- If you had six months to live, how would you spend your time?
- Describe a passion you have and how it affects your life purpose.

NOTES AND FEEDBACK		

# MASTER THE ART OF ENGAGEMENT & INTERACTION

Engaging with others is a cornerstone of success in real estate. As an agent, every interaction can influence relationships, build trust, and open doors. Whether meeting clients, networking, or negotiating deals, effective communication leaves lasting impressions. Here are important guidelines to remember when interacting with others:

### 1 BE PRESENT AND ATTENTIVE -

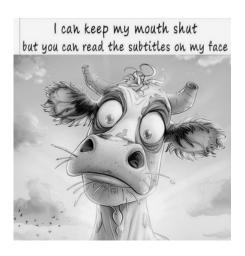
- Pay Attention | Actively listen by avoiding distractions and demonstrating interest by focusing
  on the speaker without interrupting, maintaining eye contact, and offering verbal affirmations
  like "I understand," or "tell me more."
- Ask Engaging Questions | Ask open-ended questions that encourage conversation and uncover their needs, goals, and expectations.

### 2 COMMUNICATE CLEARLY AND CONCISELY -

- Avoid Rambling and Speak with Purpose | Organize your thoughts before speaking. Stick to key point and summarize complex ideas to maintain clarity. Use positive language and try to avoid filler words like "um," "you know," and "like" with brief pauses.
- Match Your Conversation Partner's tone, pace, and energy level. Pay attention to whether or not they are using formal language or a more casual, friendly dialogue.

### 3 MAINTAIN PROFESSIONAL BODY LANGUAGE -

- Control Gestures | Use purposeful hand gestures to emphasize points, but avoid excessive movements that can distract or appear nervous or discomfort. Maintain eye contact to build trust, but avoid staring. Act naturally, but maintain composure.
- Smile and Keep and Open Posture | A genuine smile can instantly break barriers. Keep your arms uncrossed and stand or sit up straight to project approachability and confidence.



IF MY

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DOESN'T SAY IT, MY

ACC

DEFINITELY WILL



### 4| BUILD GENUINE CONNECTIONS -

- Personalize Conversations | Reference shared interests or experiences to create rapport, but avoid talking too much about yourself. Show empathy by acknowledging emotions and validating concerns.
- Follow Up with Gratitude | Send a quick thank you email or text after the meeting to thank the
  other person for their time and recap key points discussed to show attentiveness and
  gratitude.

### 5 BE ADAPTABLE -

- **Know Your Audience** | Tailor your communication style to fit your audience, whether they are colleagues, clients, or friends.
- Be Flexible | Be willing to adjust your approach based on feedback or the needs of the conversation. The body language of your audience is often greater feedback than verbal communication.

### 6 READ THE ROOM

As you are engaged in conversation, pay attention to body language indicators, which are non-verbal cues to gauge engagement, and adjust accordingly:



### DOZING OFF OR LOOKING AWAY

Signals boredom or disinterest; Reengage with a question or change of pace.



### NODDING OR LEANING IN

Shows interest and attentiveness; continue building on key points.



### DOZING OFF OR LOOKING AWAY

May indicate defensiveness or discomfort; adopt a more open approach.



### SMILING AND EYE CONTACT

Reflects engagement and connection; maintain rapport.



### **CHECKING PHONE OR WATCHES**

Suggests distraction, loss of interest, or conversation is taking too long; refocus conversation to recapture attention and speed up conclusion.

# CONTROL YOUR BODY LANGUAGE

#### **EYE CONTACT-**

Engaging shows confidence, attentiveness, and sincerity. It can also indicate interest and respect.

Avoiding eye contact may suggest discomfort, dishonesty, or lack of interest.

### FACIAL EXPRESSIONS -

- Smile: Indicates friendliness, warmth, and openness.
- Frown: Can signal displeasure, confusion, or disapproval.
- Raised Eyebrows: Often suggests surprise, curiosity, or disbelief.

#### OPEN POSTURE -

Upright, relaxed, and shoulders back demonstrates confidence, openness, and readiness to engage.

Closed Posture (slouching, crossed arms or legs) indicates defensiveness, insecurity, or disengagement.

### **GESTURES** -

Nodding shows agreement, understanding, or encouragement, while pointing can be viewed as assertive, aggressive, or accusatory. Open palms suggest honesty, openness, or non-threatening.

### - HANDSHAKES -

Firm handshakes convey confidence, professionalism, and strength. However, overly strong handshakes convey aggression and domination.

Weak handshakes indicate nervousness, lack of confidence, and insecurity.

### PERSONAL SPACE -

In social settings, it is appropriate to give 18 to 24 inches (or about an arm's length) of personal space between you and others engaged in conversation. This shows respect for boundaries and prevents feelings of intrusion, aggression, or inappropriate advances.

#### - POSITION -

Facing the person demonstrates attentiveness and interest, while turning away suggests disinterest, distraction, or a desire to exit the interaction. Head down typically indicates shyness, lack of confidence, and feeling defeated, while a head tilt may indicate curiosity and interest.

#### - TOUCH -

A light touch of the arm or shoulder can convey empathy, warmth, and reassurance, while unwanted touch may be perceived as inappropriate, uncomfortable, or disrespectful.

Limit touch until after you learn the other person's personality. Don't assume everyone enjoys being touched.

### FIDGETING -

Calm, still hands reflects composure, control, and confidence, while fidgeting signals nervousness, boredom, anxiety, or impatience.

### **MIRRORING**

Matching another's gestures and posture (mirroring) indicates rapport, agreement and connection. Lack of mirroring can suggest lack of connection, disagreement, or distance.

#### ARMS & HANDS

Crossed arms can be interpreted as defensive, resistant, or closed-off and lack of agreement. Open arms or at the side often signals approachability, willingness to engage, and open to conversation.

### FEET & LEGS -

Feet pointed towards someone demonstrates interest and engagement, while pointing away may signal a desire to leave or lack of interest. Crossing knees may indicate defensiveness or anxiety, while crossing ankles may indicate confidence, relaxation, and dominance.

### MASTERING COMMUNICATION SKILLS EXERCISE & WORKSHEET

### 1 | ACTIVE LISTENING

Have a conversation with a partner where you focus entirely on listening.

### Steps:

- Sit in a quiet place with no distractions.
- Let your partner speak for 5 minutes about a topic of their choice.
- After they finish, paraphrase what they said to confirm your understanding.
- Reflect on how well you listened and note any distractions or challenges.

TASK

reflection

What made it easy or difficult to listen actively?

How did your partner respond when you paraphrased his/her words?

### 2 | BODY LANGUANGE

Switch roles with your partner and follow the same steps above, but have him/her observe your body language and give answers, based on the following guidelines:

- Pay attention to your posture, facial expressions, and eye contact.
- Avoid crossing your arms or legs and maintain an open posture.
- Observe how others respond to your body language.

TASK

reflection

How did body language affect the conversation?



What body language cues did you notice, and how did you perceive the message?

### 3 | ASSERTIVE COMMUNICATION

Practice expressing your thoughts and needs clearly and assertively.

- Identify a situation where you need to express your opinion or set a boundary.
- Use "I" statements to communicate your needs.
- Practice with a friend or in front of a mirror.

TASK

reflection

How did it feel to communicate assertively?

How was your message received?

### 4 | PRACTICE EMPATHY

Engage in a conversation where you focus on understanding the other person's feelings.

- Listen to the other person without interrupting.
- Acknowledge their emotions by saying, "It sounds like you're feeling..."
- Offer support or ask how you can help.

TASK

reflection

How did the other person react to your empathetic approach?

### **5 | CLARITY AND CONCISENESS**

Practice delivering a message in the clearest and most concise way possible.

- Choose a complex idea or message you need to communicate.
- Break it down into simple, straightforward points.
- Share the message with a friend or colleague and ask for feedback.

TASK

reflection

Was your message understood easily?

How can you improve clarity in your communication?

Mastering communication is an ongoing process that requires awareness, practice, and reflection. By consistently applying these principles and exercises, you can improve your ability to connect with others, convey your ideas effectively, and navigate conversations with confidence.

Known as the "Great Communicator," President Ronald Reagan honed his communication skills as an actor, radio broadcaster, and public speaker. He attributed his ability to communicate, Reagan made clear, a good speech must be truthful and authentic, not pandering to emotions. It must take into account the audience's mood and guide their passions and imagination, while using the words of the common man, which are easily understood.

"I wasn't a great communicator, but I communicated great things."

# CENERATION & CLIENT ACQUISITION



# THE IMPORTANT ROLE OF REALTORS®

#### THE VITAL ROLE OF REAL ESTATE AGENTS

In light of recent industry changes following the NAR settlement, concerns have arisen about the potential decline of buyer's agency. However, the importance of buyers and sellers having their own representative cannot be overstated. Purchasing a home is often the largest financial investment a person makes, and the process can be complex and emotionally charged. With professional representation, both parties gain valuable insights into their options and choices, minimizing potential legal complications. The benefits provided by REALTORS include, but are not limited to:

### **Market Expertise**

Realtors have in-depth knowledge of local market trends, neighborhoods, and property values, ensuring clients have the info to make informed decisions.

### SE

Access to a robust network of other agents and professionals, Realtors not only provide clients with trusted recommendations, but also other agents that may have the perfect home.

Network

### **Stress Relief**

With over 185+ steps to every real estate transaction, Realtors help clients reduce stress by managing paperwork, negotiations, and communication on behalf of their client(s).

### **Access to Listings**

With access to a comprehensive database of listings, including those not yet on the public market, agents bypass Zillow and others offering a wider selection of homes

### Legalities

Well-versed in the legal aspects of real estate transactions, Realtors ensure all contracts and disclosures are completely accurate.

### **Future Earnings**

Realtors can advise clients on potential resale value and long-term investment potential of home-buying.

### **Skilled Negotiations**

As trained and skilled negotiators, Realtors can secure the best price and terms for a client's purchase, saving them money, time, and hassle.

### Objectivity

Realtors help clients navigate emotional decisions and help them by offering objective advice so they can stay focused on their priorities.

### Representation

Knowing their agent is their personal representative, advocate, and negotiator offers clients the assurance of a smooth and successful transaction.

# LEAD GENERATION AND CUSTOMER ACQUISITION

Effective lead generation and client acquisition begin with a robust marketing strategy aimed at reaching potential clients, outperforming competitors, and cultivating lasting relationships that lead to repeat business and referrals. The three core marketing approaches include Attraction (also known as "Magnetic"), Traditional, and Hybrid Marketing.

### **Attraction & Magnetic Marketing**

Attraction marketing in real estate is a **value-driven** approach that focuses on positioning the agent as a trusted resource. It emphasizes building long-term relationships and fostering organic interest.

### Key components include:

- Social Media Engagement
- Content Marketing
- Personal Branding and Storytelling
- Educational & Informational Events
- Community & Charitable Events
- Digital Marketing
- · Gift-Giving | Ethical Incentives

**Objective:** The focus is on drawing clients who are genuinely interested and view you as an expert and a resource, leading to more qualified leads and referrals over time.

Advantages: Attraction marketing fosters longterm relationships, builds credibility, and establishes you as the expert. By providing value upfront, it creates a reputation for reliability and trustworthiness, leading to clients who are more likely to engage when they're ready to buy or sell.

### **Traditional Marketing**

Traditional marketing in real estate focuses on direct outreach and immediate visibility. It's often more transactional, aiming to generate leads quickly.

### Key components include:

- Direct Mail Campaigns
- Print Advertising
- Billboards
- Signs and Banners
- Brochures | Flyers | Guides
- Trade Show Giveaways

**Objective:** The goal is to capture immediate attention and drive quick response, often focusing on short-term leads and direct inquiries.

**Limitations:** While traditional marketing can provide broad exposure, it may not always establish strong, long-term relationships or a distinct brand identity. The focus on pushing listings or services can also make it feel more sales-oriented and less personal.

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"Be so good, they can't ignore you."

# TRADITIONAL VS. ATTRACTION MARKETING STRATEGIES

Aspect	Traditional Marketing	Attraction Marketing		
Goal	Generate immediate sales through direct promotion.	Build trust and relationships to attract customers naturally.		
Approach	Push marketing: focuses on reaching out to potential customers.	Build trust and relationships to attract customers naturally.		
Message	Features the service, highlighting benefits and specifications.	Centers on providing value, insights, and solving customer problems.		
Engagement	Limited engagement; often a one-way communication.	High engagement; encourages interaction & conversation.		
Focus	Service-centered; emphasizes features, prices, & benefits.	Customer-centered; emphasizes needs and adding value.		
Content	Ads, direct mail, printed promotions, signs, and billboards.	Educational or informational content, blogs, videos, webinars, events.		
Sales Process	Transactional with the focus on closing the sale quickly.	Relationship-based, focusing on building rapport and trust.		
Reach	Broad and less targeted, aiming for larger audiences.	Targeted, designed to reach people who are actually interested.		
Longevity	Short-term. Often tied to specific promotional campaigns.	Long-term. Aimed at building brand loyalty, repeats and referrals.		
Perception	Often seen as intrusive, salesy, annoying, disingenuous.	Viewed as helpful, value-driven, a trusted resource, empathetic.		
Style	Often a "hard sell" tactic focused on persuasion for immediate decisions.	"Soft Sell" approach that encourages clients to buy when ready.		
Metrics for Sales volume, reach, and short-term ROI.		Customer engagement, brand loyalty, and long-term relationships.		

In essence, traditional marketing is more direct, aiming to make an immediate sale, while attraction marketing builds a foundation of trust and value that invites customers to engage organically.

# CREATING HIGH-VALUE SOCIAL MEDIA CONTENT

The art of successful branding is creating valuable resources, tools, and content that answer your audience's questions, guides them through the process, eases their pain points, solves their problems, or finds a solution to their challenges.

### TELL RELATABLE AND INTRIGUING STORIES

The most effective branding is identified by the stories they tell and the emotions they evoke. Telling a compelling story that your customers and clients can relate to will instantly attract them to your brand and service.

**Example:** Budweiser Clydesdales and Super Bowl Commercials

### **EDUCATE AND INFORM**

Share helpful resources and tools that answer your target audience's questions, addresses an issue or problem, and offers a helpful solution or direction to help solve their problem.

**Example:** Buyers/Sellers Guides, Property Investment Tips, Local Market Insights, Relocation Tools

### **ESTABLISH A STRONG ONLINE PRESENCE**

Develop a strong online presence that consistently shares your content and keeps you top-of-mind. Having a strong online presence (especially with social media) builds instant credibility, authority, and relatability. And it helps you get in front of an audience quickly. The key to doing this is consistency.

**Example:** eNewsletters, Blogs, Social Media Posts

### **USE ENGAGING VIDEOS AND REELS (SHORT VIDEOS)**

Using video and reels on social media and in your online content is the fastest way to grab your audience's attention. This includes using captions and editing your content to help maximize viewer engagement. Reminder, most people watch videos on silent first, so capturing their attention quickly is key. Grab them with short, straight-to-the-point reels that lead to slightly longer videos, which lead them to longer form content.

**Example:** 5-second reel leads to a 30 second video, which leads to a 15-minute video.

### ODYSSEY CLIENT ATTRACTION WEBINAR MODEL

Odyssey believes in working smarter, not harder, and capitalizing on attraction marketing methods where customers are attracted to value. One successful tool that not only attracts customers, but also has a high conversion rate is hosting FREE online webinars for sellers and buyers, covering a diverse set of topics. These 45-minute webinars are interactive, LIVE, and chocked full of valuable information, incentivized by a FREE gift with a Call-to-Action (CTA). Here is how the model works:

### **ESTABLISH A WEEKLY 2 X 2 WEBINAR CALENDAR**

1

Host **TWO** (2) webinars, **TWO** (2) times monthly - one for buyers and one for sellers - changing the topic monthly. The best times to host these webinars is around **7:00 PM Tuesday - Thursday**. Avoid the other days because they are less attractive. If you don't feel comfortable doing these, tap into the Broker webinar. Leads will be disbursed to the Associate/Partner in that area or the ones who attend the webinar equally.

### 2

### ORDER OR CREATE A FUNNEL PAGE -

Marketing Services can create for you a funnel page that collects registrations for the webinars. Each funnel page will collect name, email, and cell phone only, and a link to your specific webinar. You can certainly do this on your own, as well.

### 3

### ORDER OR CREATE YOUR DIGITAL & PRINT ADS

Facebook and Instagram ads tend to be the most effective in converting leads into registrants for the webinar(s). These paid promotions are at the expense of each individual associate/partner, but Marketing Services can create your ads for free or you can do them yourself. Plus, you have the option of having postcards and/or flyers printed for handouts or mailouts. Ads will run for 14 days prior to the scheduled webinar then changed out monthly with the new dates and topics.



### **INVITE PROFESSIONAL GUESTS -**

When hosting webinars, don't be afraid to invite a professional guest to make a brief introduction or teach a small portion of the webinar. For example, you can invite a mortgage loan officer to explain the basic process of getting pre-approved for a home loan during your buyer's webinar. Or you can invite a home inspector to talk to sellers about items to consider repairing or replacing before listing their home. This helps give you a break, while making your webinar more engaging.



### ALWAYS DO A CTA FOR AN INITIAL CONSULTATION

Entice customers to book a FREE Initial Consultation with you and offer the gift of the FREE Workbook and Buyers or Sellers Guides as an incentive. Create an online booking calendar at TidyCal or Calendly point customers too. Once they book their initial appointment with you, they will receive a link or automated email with the Guide and Workbook to download.

# ODYSSEY CLIENT ATTRACTION WEBINAR FUNNEL

### PAID SOCIAL MEDIA ADS | PRINT MEDIA

### WEBINAR REGISTRATION LANDING PAGE

#### **AUTOMATED REMINDERS**

### **ZOOM WEBINAR**

### CTA CALENDAR LINK



- FREE WORKBOOK
- FREE GUIDE

### INITIAL CONSULTATION

### **STRATEGY SESSION**

### **FOLLOW-UP**

### **SHOWINGS & TOURS**

### **CLOSING & POST-CLOSING**

# SAMPLE WEBINAR TOPICS

For Sellers

### Sell Smart, Sell Fast: Insider Secrets to Maximizing Your Home's Value

- · Preparing your home for sale
- Pricing strategies for today's market
- · Staging tips to attract buyers

### Top 5 Mistakes Home Sellers Make and How to Avoid Them

- · Common pitfalls in pricing, negotiation, and presentation
- · How to work effectively with your agent
- · Tips for a smooth closing

### The Home Selling Blueprint: Your Step-by-Step Guide to Success

- Overview of the selling process
- Understanding local market trends
- · Marketing strategies to showcase your home

For Buyers

### From Dream to Reality: A Step-by-Step Guide to Buying Your First Home

- Navigating the home-buying process
- Budgeting and financing tips
- · What to expect in today's market

### Homebuying in a Changing Market: What You Need to Know"

- · Adapting to market fluctuations
- · Understanding buyer demand and inventory
- · Planning for long-term growth

### Unlocking Your Dream Home: The Truth About Mortgages and Financing"

- · Breaking down mortgage options
- Credit score tips for better rates
- · Navigating pre-approvals and closing costs

# POST-WEBINAR STEPS TO CUSTOMER CONVERSION

Once a customer has scheduled an Initial Consultation with you, here are the steps for successfully converting them into a client:

1

### CREATE A CONSISTENT WEBINAR SCHEDULE

Host **TWO (2) webinars twice per month** - one tailored to buyers and one focused on sellers - rotating topics monthly to keep the content fresh and engaging. Schedule webinars around **7:00 PM, Tuesday** - **Thursday** for maximum attendance. Avoid other days, as they typically lower attendance. Leverage broker webinars if hosting webinars is outside your comfort zone. Leads generated from broker-hosted webinars are distributed to attending Associate/Partners.

2

### CREATE OR ORDER A REGISTRATION FUNNEL PAGE

Marketing Services can assist you by designing a customized funnel page to streamline webinar registration, collecting name, email, and cell number, and providing a link to your specific webinar. If you prefer to create your own funnel page, ClickFunnels and Leadpages are optional platforms.

3

### ORDER OR CREATE YOUR DIGITAL & PRINT ADS

Maximize your webinar attendance with targeted Facebook and Instagram ads, which are proven to be highly effective for converting leads into registrants. Marketing Services can assist you by designing ads for you that are proven and tested to succeed. Run ads for 14 days prior to each scheduled webinar, updating them monthly with new topics and dates.

4

#### INVITE PROFESSIONAL GUESTS TO ELEVATE YOUR WEBINAR

Enhance the value and credibility of your webinars by inviting professional guests to contribute. Their expertise can make the session more engaging while giving you a brief break during the webinar. Examples include inviting a mortgage loan officer to your buyer's webinar to explain the basics of pre-approval or bring in a stager to your seller's webinar to discuss key elements that help set the stage for higher offers and maximum sales opportunities.

5

### ALWAYS INCLUDE A CTA FOR AN INITIAL CONSULTATION

End every webinar with a clear and enticing Call-to-Action (CTA) to encourage attendees to book a FREE Initial Consultation by providing them with a FREE Workbook and Buyer's or Seller's Guide as an incentive. Highlight the value of these resources during the webinar to build interest. Then, direct them to an online booking calendar such as TidyCal or Calendly.

# ENHANCE YOUR BRAND WITH ODYSSEY'S MARKETING

Creating professional, visually engaging content is vital for building your brand but can be time-intensive and require specialized skills. At Odyssey, we simplify this process, providing agents with access to our expert Marketing Services to craft impactful materials that showcase your brand effectively—allowing you to focus on revenue-generating activities.

You're welcome to create your own branded materials within our firm's guidelines. However, as part of our full-service support, we offer complimentary access to Odyssey-branded materials such as presentation folders, swag, signs, banners, and more. Custom projects like printing, postage, or delivery may incur costs, but our Marketing Coordinator (MC) is here to assist with:

- Business Cards
- Property Flyers
- Presentations
- Bio & Brag Sheet
- · Social Media Content
- Mailers
- eNewsletters
- Guides
- Giveaways | Handouts
- Note Cards
- Letterhead
- Informational Flyers
- Websites
- Folders
- Kits & Boxes



and so much more!

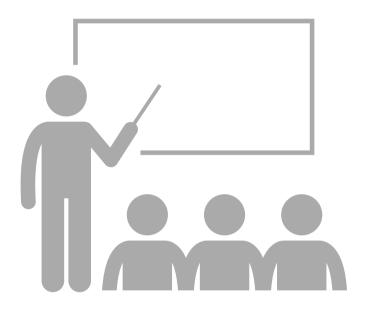
With our expert support and resources, you'll have everything you need to create a consistent, professional image that strengthens your brand and leaves a lasting impression.

TO ORDER BRANDED ASSETS:

Complete the *Marketing Support Order Form* on the Odyssey Workspace.

### ESTABLISH YOURSELF AS THE AUTHORITY

Establishing yourself as the Go-To-Guru and Authority in real estate in your market involves a blend of expertise, reputation, consistent engagement, and strategic positioning. It starts by **ALWAYS LEARNING**. Every great teacher or leader is first a student.



**STAY EDUCATED AND UPDATED:** Pursue knowledge about real estate relevant to your market, including market insights, trends, economic and political impacts, and demographic changes. Take courses that help advance or enhance your real estate knowledge and expertise.

**SPECIALIZE:** The true riches are in the niches. Focusing on a specific real estate segment (such as luxury homes, first-time home buyers, divorced or expired listings, commercial properties, etc.) highlight unique services and expertise that build a reputation in your targeted area.

**GATHER AND SHOWCASE TESTIMONIALS AND CASE STUDIES:** Highlight positive client feedback and share success stories that detail your work with clients, demonstrate your process, establish credibility.

**CREATE TRUST:** With full transparency and open communication, it is important to not only educate and advise your clients, but also to follow-through consistently. Reliability is key to establishing authority. Always do what you say you are going to do and do it within the timeframe you establish.

**DELIVER CONSISTENTLY EXCEPTIONAL RESULTS:** Exceed client expectations by creating an experience they won't forget. This includes providing smooth transactions, open communication, accountability, transparency, and thinking ahead to reduce risk and solve problems before they become issues.

## EFFECTIVE NETWORKING AND COLLABORATION

Bestselling author Porter Gale emphasizes that social capital—genuine, meaningful connections—is often more valuable than financial capital. Success depends not only on what you know but also on who you know. Networking with established leaders, influencers, and organizations can lend credibility through association, but true success is built on integrity, dedication, and trust.

As a real estate professional, strategic networking is vital to your growth. Build connections through community events, charity gatherings, business meetups, seminars, masterminds, or smaller personal events like book clubs or golf outings. Each interaction strengthens your presence and credibility.

Effective networking thrives on the principle of giving. Buyers and sellers focus on their own goals, and your role is to guide and support them. By offering your expertise and time, you position yourself as a trusted ally in their journey.

While some focus solely on self-gain, often using unethical tactics, Odyssey prioritizes authenticity and integrity. We believe in ethical interactions and investing in others, knowing that success follows when trust and value are at the forefront.

This philosophy extends to partnerships with professional service providers like mortgage brokers, inspectors, and title agents. Collaborating with trusted experts enhances your credibility, but as with friendships, choose your affiliations wisely. Building a network rooted in respect, trust, and mutual benefit ensures long-term success.

- Focus on Building Quality Connections, Not Quantity
- Show Genuine Interest
- Be Clear About Your Value
- Practice Giving First
- Follow Up and Stay in Touch
- Be Approachable and Authentic
- Be Consistent
- · Engage in Mutual Sharing
- Be Respectful of Time
- Join the Right Spaces
- Pay Attention to Body Language
- Be a Connector
- Maintain Integrity
- · Be Professional: Avoid Offenses



## THE LAW OF SOWING & REAPING

Odyssey's proven lead-generating strategy capitalizes on the Law of Sowing and Reaping, a biblical and philosophical principle, emphasizing the relationship between our actions and the outcomes they produce. What we "sow" - meaning efforts, intentions, and behaviors - directly affects what we receive ("reap") in return.

# KEY PRINCIPLES OF SOWING & REAPING:

SEED. FEED. WEED. SUCCEED.

harvest you receive. Apples produce apples. Positive actions produce positive results.
Feed: Results are not often instantaneous. Patience and persistence are required before a harvest is ready.

persistence are required before a harvest is ready.Weed: Sometimes weeds grow in your field and you have to

**Seed:** The type of seeds you plant determines the type of

 Weed: Sometimes weeds grow in your field and you have to remove them so they don't choke out the good seeds.
 Negativity and toxic people are only worth the time to remove.

 Succeed: Even the smallest seed can produce a large and bountiful harvest, illustrating how our efforts, whether good or bad, multiply over time.

APPLICATION OF THE LAW:



- Personal Growth: .Investing time and effort into learning, discipline, wellness, and positive relationships often leads to long-term success and fulfillment.
- Business & Career: Hard work, strategic planning, and innovation typically lead to career advancement and business growth.
- **Spiritual & Emotional:** Practicing kindness, patience, gratitude, forgiveness, and generosity can result in emotional peace and meaningful connections.



## GIFT-GIVING IDEAS FOR "SEED" PLANTING

Many salespeople, including real estate agents, spend most of their time chasing paid leads, pleading with family and friends for business and referrals, and resorting to pushy, outdated sales tactics—often relying on fear, pressure, or misleading information. These approaches can feel desperate or even deceptive, leaving consumers frustrated and defensive. People don't like being sold to!

As Zig Ziglar wisely said, "People don't care how much you know until they know how much you care." At Odyssey, we embrace this principle and align it with the Law of Sowing and Reaping.

Our philosophy is rooted in generosity—offering value, expertise, and knowledge freely, without expectation. Giving builds trust and connection, while taking often raises suspicion and resistance. True success comes from a spirit of generosity—when you give without strings attached, it eventually returns to you in ways far greater than imagined.

To help you cultivate meaningful relationships and grow your business, here are a few thoughtful "seeds" or gifts you can plant in the fields of your future clients and customers:

#### **Practical & Thoughtful Gifts**

- Customized Welcome Mats
- Personalized Cutting Boards
- · Seasonal Plant Kids or Seeds
- Gift Baskets
- · Smart Home Gadgets
- Personalized Key Holders
- · Local Gift Cards to Client Favorites
- Customized Address Stamps | Labels
- Toolkits or Multi-Tools
- Cookbooks or Recipe Cards

#### Symbolic & Sentimental Gifts

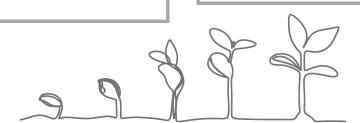
- Potted Plants or Tree Seedlings
- Inspirational Books
- Memory Journals or Scrapbooks
- Wind Chimes or Garden Decor
- Custom Printed Photo or Drawing of New Home
- Custom Ornaments, Wall Art, or Home Decor
- Family Photo Session
- Wine, Coffee, or Tea Subscriptions

#### **Lead-Generating Gifts**

- Branded Coffee Mugs, Tumblers, Coasters
- Emergency Contact Magnets
- Custom Notepads or Journals
- Branded Cooling Towels
- Gift Cards to Local StOdyssey, Gas Stations, etc.
- Calendars w/ Home Maintenance Tips

#### Top of Mind Gifts -

- Home Anniversary Gifts
- Holiday-Themed Gift Boxes or Baskets
- Home Maintenance Checklists or Guides
- Handwritten Cards for Special Days
- Monthly Newsletter & Market Updates
- Lunch UpDates & Social Gatherings



## CAPTURE INTEREST WITH LEAD MAGNETS



A lead magnet is a valuable piece of content, offer, or resource that businesses provide to potential clients in exchange for their contact information, typically an email address. It's a tool designed to attract leads by offering something of perceived value to them, initiating the relationship-building process. In real estate, lead magnets are especially powerful because they help agents capture and nurture leads in a competitive industry.

#### **KEY CHARACTERISTICS OF AN EFFECTIVE LEAD MAGNET:**

- High Value: It should provide information or resources that solve a specific problem or answer
  questions potential clients have.
- Targeted: Tailored to a specific audience segment, whether they're first-time homebuyers, investors, sellers, or renters.
- Easy to Consume: Quickly digestible formats like PDFs, checklists, or short videos perform well.
- Instantly Accessible: Delivered immediately after contact information is provided, to create a smooth user experience.

introducing...

**SUCCESS PACKS** 

Odyssey has taken the guess work out of lead magnets to help you attract clients and customers to your brand and business. Introducing our exclusive Sellers and Buyers Success Packs, each includes a broker-branded 9x12 box filled with contents designed for either your seller or buyer, including:

- >>> Seller or Buyer Workbook
- >>> Seller or Buyer's Guide
- >>> Specialty Guides
- >>> Property Marketing Samples
- >>> Seller or Buyer Folder for Contracts and Flyers

**PLUS +** Every seller and buyer receives our custom-printed **Moving Kit** (including moving boxes, tape, markers, labels, etc. and

Our **HOME Essentials Kit** for sellers to gather remotes, keys, codes, appliance manuals, and more to leave for the buyers when they move.



## BUILD LONG-TERM RELATIONSHIPS

Many people think real estate—or any sales profession—is purely about "sales." In reality, it's all about "relationships." Building long-term relationships isn't just about forming friendships you might invite over for dinner; it's about creating a community of supporters. While some connections may turn into lifelong friendships, most will remain as professional relationships that contribute to your success through repeat business, referrals, or testimonials.



### hour to build LONG-TERM RELATIONSHIPS



#### PROVIDE EXCEPTIONAL SERVICE

Create an unforgettable experience for your client by going above and beyond to leave a lasting impression that encourages future referrals and repeat business.



#### **STAY TOP-OF-MIND (TOM)**

Personalized emails, texts, newsletters, occasional notes with gift cards, holiday and birthday greetings, and, of course, phone calls to stay connected are essential.



#### SHOW GENUINE CARE POST-SALE -

While staying top-of-mind is essential, show you genuinely care by not talking about real estate or asking them for referrals. Prove to them they are more than just a sales transaction.



#### **ENGAGE ON SOCIAL MEDIA**

Follow your clients on social media and engage with their posts. This makes it easy for them to stay connected with you and vice versa, while also instantly connecting with their friends and family for potential referrals. Again, don't talk real estate unless someone asks.



#### **EDUCATE AND INFORM**

Host occasional events such as seminars, webinars, client appreciation outings, that create opportunities to engage in learning. You don't have to be the teacher. You can rely on other professionals such as carpenters to teach DIY home improvement, lenders to talk about how to rebuild or improve your credit, your broker to teach on buying/selling a home or cash offers, etc.





#### **RECOGNIZE KEY LIFE EVENTS -**

Congratulate clients on major life events such as weddings, anniversaries, job promotions, family additions, etc. to show personal investment and interest in their lives.



#### SHOW PUBLIC GRATITUDE -

If appropriate, and with their permission, acknowledge clients in social media posts. And be sure to send them a thank you card and gift (or give at closing) for selecting you.



#### MAINTAIN AND UPDATE YOUR CRM

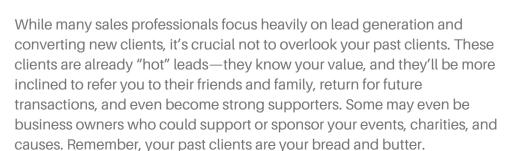
Your CRM is your greatest tool for organizing and remembering details about your client so you can personalize interactions and never miss touchpoints. This is your "rolodex."

# CUSTOMER RETENTION



Building meaningful relationships takes time and discernment. Not every client will be someone you want to stay connected with long-term, and that's perfectly fine. Like dating, some connections won't lead to lasting relationships. Use your CRM to keep these clients in a separate category, and don't feel obligated to maintain contact if it doesn't serve you.

Protect your circle by letting go of difficult or toxic individuals. Your relationships should empower you, not drain you. Analyzing and refining your approach to building relationships is essential for lasting success. This means investing time before, during, and after each sale.





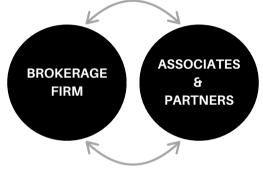
## THE ODYSSEY APPROACH

Odyssey's strategic, hybrid approach to lead generation, client acquisition, and retention combines both traditional and innovative attraction marketing strategies to achieve outstanding results in attracting new clients, converting leads, and fostering long-term loyalty. Our proven success system strengthens relationships, expands opportunities, and empowers our associates and partners to become the trusted go-to experts in their local markets.

Direct Mail Campaigns
Print Advertising
Billboards
Signs and Banners
Brochures | Flyers | Guides
Trade Show Giveaways

Social Media Ads Blogs Websites Events | Webinars eNewsletter Ethical Incentives

#### TRADITIONAL MARKETING



ATTRACTION MARKETING

Targeted Farming
Print Collateral
Sign Riders
Brochures | Flyers | Guides
Trade Show Giveaways

Social Media Engagement Content Creation Personal Branding & Storytelling Events Gift-Giving | Ethical Incentives

.....

## introducing...

#### GIFT CARD GIVEAWAY

Gift-giving is not just reserved for holidays and for the people we like and love. Odyssey gives gift cards to random individuals as a means of introducing ourselves and encouraging random acts of kindness. This is a great way to generate leads, make an immediate impact on others, and carry out our commitment to building community.



Front





Back

## PROFESSIONAL FEE POLICY

#### THE NAR SETTLEMENT SHAKEUP AND IMPACT ON THE INDUSTRY

In 2024, the National Association of Realtors (NAR) and several major real estate firms settled a lawsuit alleging commission manipulation. The case challenged NAR's Cooperative Compensation Rule, which required listing agents to offer and disclose buyer agent compensation on the MLS.



This often led to excessive fees for sellers, who were unaware they were paying for the buyer's agent and potential conflicts of interest for buyers, who felt they were not being exclusively represented since their agent was being paid by the seller.

Under the settlement, MLSes can no longer display compensation offers. Buyer agents must now be paid directly by their clients or negotiate fees with the seller through the purchase offer or a separate agreement. While agents worry about lost compensation, listing agents may still offer payment via non-MLS channels, and all parties must be made aware of the compensation for full transparency.

At Odyssey Real Estate Services, we ensure fair compensation for all our associates and partners. Through our **Seller Menu of Services**, we automatically include up to 2% designated for the buyer's agent compensation. We emphasize the importance of agents demonstrating their value, earning the business of their respective client, and maintaining fair pricing for all with full transparency.

While we will discuss how this is communicated in other sections of this training manual, it is important to know that while all fees are legally negotiable between each agent and their client, Odyssey adopts a policy that promotes the value of our associates and partners by rarely discounting our professional fees, because when you discount your fees, you discount your value.

This policy reinforces that the high-value of service provided by not only you, as the agent, but also the team of professionals (including the buyer's agent) working on behalf of the client, warrants equitable compensation.

WHEN YOU DISCOUNT YOUR FEES, YOU DISCOUNT YOUR VALUE However, it is paramount that you, as the agent, learn how to provide a stellar client experience that justifies the compensation provided through our professional fees.

This training bootcamp and manual will help elevate your expertise and advance you past some of the more experienced agents in the industry.

## BUYER REPRESENTATION



## BUYER ACQUISITION



## FORMING THE BUYER-BROKER RELATIONSHIP

#### The Buyer-Broker Relationship: Legal and Ethical Considerations

The relationship between a buyer and a broker can be compared to professional relationships in fields such as law. When a buyer or seller becomes a client, they are ultimately a client of the brokerage firm—regardless of which agent initially acquires them. This is because the broker holds the legal responsibility for compliance, oversight, and ensuring both agents and clients adhere to ethical and legal standards.

As representatives of the broker and the firm, agents operate under the brokerage's policies. Some firms do not permit agents to retain clients upon departure. However, at Odyssey, we believe that if an associate or partner (agent) has invested the effort to build a client relationship, that client should have the option to continue with the agent should they leave the firm. Despite this, Odyssey maintains all transaction records for any business conducted during an agent's tenure, ensuring compliance and accountability.

#### ESTABLISHING LEGAL CLARITY AND TRUST

A key part of this trust-building process is discussing the legal aspects of the buyer-agent relationship early on. Failing to do so can lead to misunderstandings, lost income, disloyal buyers, and even legal consequences.

Agents must be clear about their role and responsibilities from the outset. Missteps that can create confusion or risk include:

- Acting as a buyer's representative without clearly defining the relationship.
- · Avoiding discussions about agency agreements to prevent pressuring the buyer.
- · Assuming the default agency position in their state will suffice.
- · Believing buyers automatically understand that the agent is working in their best interest.
- · Delaying a formal buyer agreement until the buyer is ready to make an offer.

#### RESPECTING AGENT EXCLUSIVITY

As a real estate professional, it is both an ethical obligation and a best practice to ensure that a buyer is not already under a contractual agreement with another agent or brokerage. Verifying this at the outset of your relationship helps prevent conflicts, misunderstandings, and potential legal issues. Addressing exclusivity early on protects both you and the buyer, fostering a transparent and professional working relationship.

# TIPS TO ATTRACT AND ACQUIRE BUYERS

#### HARNESSING THE LAW OF SOWING AND REAPING

At Odyssey, we follow proven strategies to acquire buyers by combining traditional leadgenerating methods such as paid advertising, lead lists, and word-of-mouth with more impactful organic relationship-building activities.

#### 1 Establish a Professional Online Presence

Social media is a cost-effective and powerful tool for attracting buyers. Build an engaging online presence by creating content such as:

- Market updates
- Tips, tricks, and home improvement ideas
- Success stories and property tours
- DIY projects
- Local spotlights on restaurants, cafes, events, and small businesses

#### 2 Expand Your Sphere of Influence (SOI) Through Networking

Growing a network requires consistency, intention, and action. Your SOI includes family, friends, past clients, vendors, and community groups. Develop your network by:

- Attending and participating in local events
- Supporting charitable activities and sports teams
- Joining organizations like the Chamber of Commerce, Toastmasters, and BNI
- Connecting with groups through <u>Meetup.com</u> or creating your own community group

#### 3 Host Open Houses and Virtual Tours

Leverage our Open House Procedures to host events for listings, new constructions, and developments. Use virtual tours to attract online buyers via social media and YouTube.

#### 4 Offer Educational Workshops and Webinars

Build credibility and relationships by hosting educational events on topics such as:

- First-time home buying
- Financing options
- Real estate investing
- · Custom home building



#### 5 Organize Buyer Bus Tours or Home Parades

Host mini-bus or van tours through neighborhoods or new construction areas with multiple listings. Promote the event through flyers, mailers, and online ads. Include giveaways such as gift baskets, grills, or gift cards.

- Provide property packets and start with a brief 30-minute buyer seminar (consider partnering with a lender).
- Visit each home for 15-20 minutes.
- Conclude with refreshments and a giveaway requiring contact information.

#### 6 Plan Community-Focused Events

Build connections by organizing community gatherings such as:

- Block parties
- Charity events
- Seasonal and holiday celebrations Partner with local businesses, food trucks, first responders, and entertainment providers to attract interest and build relationships.

#### 7 Provide Free Gifts, Valuable Content, and Calls-to-Act (CTA)

Success starts with giving before asking. Build trust through transparency and value:



Offer a free, nostringsattached gift to break barriers and stay topof-mind.



Share valuable content consistently, addressing both pros and cons to build authenticity.



Focus only on productive activities and avoid timewasters.



Maintain patience, perseverance, and consistency to achieve long-term results.

## BUYER LEAD GENERATION TOOLS & RESOURCES

Generating organic leads for your real estate business means attracting potential buyers naturally through value-driven strategies. Beyond the lead generation and customer acquisition methods covered in earlier lessons, Odyssey offers exclusive tools and extensive resources to help you not only generate organic leads but also convert those leads into loyal clients. These tools include:



#### **BUYING A HOME WORKBOOK**

Odyssey's exclusive "Buying a Home Workbook" is the ultimate prepurchase guide! This six-page questionnaire is thoughtfully crafted to help buyers identify the details, amenities, and features that matter most in their home search. As their trusted advisor, you'll gain valuable insights into their preferences and goals, enabling you to pinpoint properties that perfectly match their needs.



#### **HOMEBUYER GUIDE**

This comprehensive 30-page "Homebuyer Guide" is an exclusive resource designed to provide immense value to prospective homebuyers. After completing the Workbook, this guide walks buyers step-by-step through the homebuying journey. It covers everything from understanding your role as their trusted advisor and exploring financing options to decoding real estate terminology, making offers, navigating closing costs, and more. This guide not only educates buyers but also reinforces the importance of having a skilled agent by their side for a smooth and successful real estate purchase.



#### **VACATION HOME GUIDE**

Perfect for investors and clients exploring second or vacation homeownership, the "Vacation Home Guide" offers in-depth insights into short-term and vacation rental properties. It highlights the advantages and challenges of owning a vacation home and outlines what to expect when purchasing a property for rental purposes. With this guide, clients will gain the knowledge needed to make informed investment decisions. With Odyssey's exclusive tools and resources, you'll have everything you need to attract, educate, and convert leads into clients while positioning yourself as their trusted real estate advisor.



These wire-bound books are enclosed in our exclusive Odyssey Buyer Success Pack which may include additional materials such as:

- Buyer Broker Agreement (BBA) & Disclosures
- Advisor Bio & Brag Sheet
- Preferred Partner Vendor Flyers
- Home Warranty Information & Application
- Odyssey Giveaways | Gifts | Swag
- · Thank You Card
- Property Flyers | MLS Sheets | CMA
- Relocation or Neighborhood Guide (Custom-Designed)
- Business Card
- HOA Docs (if applicable)





**BUYING WITH US** is Odyssey's Buyer's Presentation, a visually engaging, full-color resource that complements the Buyer's Guide and Workbook within the Buyer Success Pack. As the third book in the series, it showcases our services, highlights the value we provide, and educates buyers on what to expect when working with us.

Our Menu of Services offers buyers clear, transparent options, outlining available services, associated pricing, and detailed descriptions—ensuring clients know exactly what they are paying for and the benefits they receive.



**LEARN** about your buyer's needs



EDUCATE and inform your buyer on the process and set expectations



your buyer's trust and business by creating value and highlighting our services

#### **PROCESSING**

### **BUYERS WITH ODYSSEY**

#### 1 | First Point of Contact

- Customer contacts you or is transferred to you by phone, email, or inperson
- BEST PRACTICE: Respond within 15-20 minutes
- Input contact information into CRM
- Complete the first page of the Workbook and send the Workbook to the customer for completion by the next appointment
- Schedule 1st Meeting | Initial Consultation



#### 2 | First Meeting | Initial Consultation

- Ask the customer to return the completed Workbook back to you. If the Workbook is incomplete, finish it with the customer
- BEST PRACTICE: Meet in person in a public location or via Zoom
- Review Workbook answers and ask subsequent questions for clarification
- Thank them for the information and explain that at the next meeting you will have 3-5 properties for them to review
- Present the Buyer's Guide
- Schedule 2nd Meeting | Strategy Session

# HOMEBUYER CHATTHUR TO UNER TO NOON TO BAY YOU OF COUNTY OPEN HOWE

#### 3 | Second Meeting | Strategy Session

- Meet customer in-person at a public location to review the properties you have assembled to ensure you are on the right track
- Conduct the Buyer Presentation using "Buying with Us."
- Present the Buyer Broker Agreement if the customer is ready to move forward and selects an option from the Menu of Services
- Connect buyers with a lender for pre-approval, if financing
- Share with your new client that you will be sending them emails with properties that meet their criteria and if any interest them, you can schedule a tour of properties / showings.



#### 4 | Maintain Client Connection

- Research properties every 2-3 days and send client links to YOUR website with those property addresses for them to consider
- Set up auto-drip campaigns in CRM
- Schedule tours and property showings for interested properties





#### 5 | Property Selection & Offer

- Once the client has identified a home, discuss crafting a competitive offer using the Sales & Purchase Agreement (SPA)
- · Submit offer to client for signatures
- · Submit completed offer to listing agent
- Once offer is accepted, the listing agent will return a signed copy of the offer, which now becomes the executed contract and the clock starts ticking
- Upload the Agreement (SPA) to the Transaction Management Systems (TMS) and notify the Transaction Coordinator (TC)



#### 6 | Prepare for Closing

- Send a "Thank You" card to your client
- Order the Moving Kit and Closing Gift through your Admin
- Check the TMS daily to stay abreast of changes, approaching deadlines, comments, etc. to ensure the transaction is on schedule to close
- The TC will coordinate inspections, appraisals, and any repairs negotiated in the contract and work with the Closing Agent to process the paperwork
- Schedule sign and lockbox removal before closing day



#### 7 | Attend Closing

- Closings may be done in-person at the title company office or remotely at a different location with a mobile notary contracted with the title company
- Attend the closing with the closing gift and keys to the property
- After closing is finalized, give the keys and closing gift to the client and thank them for using you as their trusted advisor
- Share with the client that our Admin will follow up to schedule the housewarming event (if they elected)



#### GIFTING BEST PRACTICES

When gifting, try to learn what clients like ahead of time. Ask questions about their interests, favorite restaurants or activities, and don't assume anything. For example, don't gift wine if you don't know if they drink alcohol. Don't gift a Starbucks gift card if you don't know if they like coffee.

Always gift practical, useful, and thoughtful gifts that fit their interests, likes, and tastes. You will only learn this by actively listening and asking questions. Avoid controversial, provocative, or inappropriate gifts that may offend your client, even if it was intended as a joke. Gifting should create a lasting impression that conveys care, loyalty, empathy, and appreciation.

## SAMPLE BUYER SCRIPT FIRST POINT OF CONTACT

Gloria Menendez sees an ad for Odyssey and calls the number.

Receptionist/Agent answers the phone.

#### **Receptionist:**

Good morning and thank you for calling Odyssey Real Estate Services. This is Bryan. How may I help you?

#### **Customer:**

Hi Bryan. I saw an ad saying you guys help first-time homebuyers and wanted to learn more about your services. Can you tell me how much you charge for your services?

#### **Bryan:**

That's a great question. But, may I ask, what is your name?

#### **Customer:**

My name is Gloria Menendez.

#### Bryan:

Thank you, Gloria. Did the advertisement have a specific advisor's name or information?

#### Gloria

Yes. I wrote down Cecelia Hutton.

#### **Bryan:**

Great! Thank you. Cecelia is one of our trusted advisors, with expertise in helping buyers, so you are in good hands.

To answer your question, our firm is not your typical brokerage that provides a set fee for services because every client's situation and needs are different and unique. Instead of charging a one-size-fits-all fee, we put you in charge by providing our clients with a menu of services to select from so you only pay for the services that fit your budget and needs.

All of this will be discussed in detail with Cecelia, who is a licensed agent. But, first, if you have a couple of minutes, I would like to gather some basic information from you so Cecelia can take it from here. Is that okay?



#### Gloria

Ok. Thank you. What do you need to know?

#### **Bryan:**

In case we get disconnected while I'm transferring you to Cecelia, may I have your phone number and email address, please?

#### Gloria

Sure. My phone number is 352-111-0000 and my email is gloriam@me.com.

#### **Bryan:**

Thank you. That is helpful. What is your preferred method of contact, calling, texting, or emailing you? And, have you signed an agreement or are you currently working with any other agent?

#### Gloria

I prefer texting. It's easier to reach me that way. And no, I am not working with another agent.

#### **Bryan:**

Thank you. That's good to know. Let me see if Cecilia is available at the moment. Please hold for a minute while I connect you.

#### Bryan calls Cecelia.

#### Scenario 1 | Bryan gets Cecelia's Voicemail

#### Bryan:

Good morning Cecelia. I have a first-time home buyer on the line, her name is Gloria Menendez, and she saw your ad. Her phone number is 352-111-0000 and her email is gloriam@me.com. She prefers to be contacted by text. I will text and email you her contact information. Please reach out to her as soon as possible. I confirmed that she is not working with any other agent. Thank you and have a good day.

#### **Bryan:**

Hi Gloria. Cecelia appears to be on the line with another client at the moment. But I provided her with your contact information, and she will reach back out to you to learn more about what your needs and goals are and provide you with additional information to help you, if that's okay.

#### Gloria:

Yes, that will be fine.



#### **Bryan:**

Perfect. Thank you for understanding. Cecelia will be reaching out to you shortly. In the meantime, thank you for contacting Odyssey and I hope you have a wonderful day!

#### Gloria

Thank you. You, too!

Bryan immediately texts and emails Cecelia with Gloria's information that he gathered from the call.

#### Scenario 2 | Cecilia Answers the Phone

#### Cecilia:

Good morning, this is Cecilia.

#### **Bryan:**

Hey Cecilia. It's Bryan. Are you available to speak with a customer seeking to buy her first home?

#### Cecilia:

Certainly! Pass her through.

#### **Bryan:**

Great! Her name is Gloria Menendez. I will text you her number of contact information after I pass her to you.

Bryan stays on the call to introduce Gloria to Cecilia and hand off the call.

#### Cecilia:

Good morning, Gloria! It's my pleasure to speak with you. How are you this morning?

#### Gloria:

It's a pleasure to speak with you, as well. I am doing well, this morning, thank you.

#### Cecilia:

That's great. Bryan shared with me that you are exploring options to buy your first home. That can be both an exciting and scary adventure. But, I want to reassure you that I am here to help you every step of the way. I would like to learn more about you, your situation, your needs and wants, and gather some additional information so I know how best to serve you, if that's okay. This will only take about 10 minutes. First and foremost, I want to confirm that you are not working with any other agent, correct? That's important because I don't want to step on anyone else's toes.



#### Gloria

That's fine. No, we are not currently working with another agent.

#### Cecilia:

Thank you. Are you married or is there anyone else who will be buying the home with you?

#### Gloria

Yes. My husband, Raymond.

#### Cecilia:

Great. Is Raymond's last name the same as yours? And do you have any pets or children?

#### Gloria

Yes. His name is the same. I do have two kids, one is 3 and the other is 14. And we have two dogs.

#### Cecilia:

Thank you for sharing. What kind of dogs do you have?

#### Gloria

We have a small chihauhau and a large golden retriever. So I definitely need a fenced in yard.

#### Cecilia:

I completely understand! We'll definitely explore properties with a fenced in yard. What type of work do you and your husband do for a living?

#### Gloria

He works for ABC Construction. He is a foreman. I am a stay-at-home mom, so I don't work.

#### Cecilia:

Well, I bet you do work. You may not get a paycheck, but being a stay-at-home mom is hard work! Being that you are looking to buy your first home, are you currently renting? And if so, when does your lease expire?

#### Gloria

Yes, we are currently renting. And that's why we want to move. Rent is becoming too expensive and we feel we are just wasting our money and getting nothing out of it. We're paying \$3,000 per month and hear it's going to go up when our lease expires March 30 of this year. So, we definitely want to move into our own home, if we can get the payments below what we are paying in rent currently.



#### Cecilia:

I completely understand your dilemma. Just know that my goal is helping you find the right home for the right price so you and your family can enjoy having a property of your own. To make sure we get off to the right start, I have a few more questions and then I want to send you a complimentary workbook that contains some additional questions you may not have thought about. This workbook will assist you in establishing the criteria for your home search, and help you identify the features and amenities that are important to you and your family. Does that sound good?

#### Gloria

Yes. But, just so you know, we have talked to a couple of other agents. And we're just trying to find the person we are most comfortable with.

#### Cecilia:

I understand. It is very important that you work with someone you like, know, and trust to represent you. So, I appreciate that you are exploring options to find the right agent. And I appreciate your considering me to represent you. With that said, I would like to share with you that if you hire me, you are not just hiring a typical agent. You are hiring a team of professionals that includes a transaction coordinator who supports us in ensuring the transaction runs smoothly so you can close on time. It also includes our broker, who helps ensure compliance with the law and regulations we must follow, and offers added protection to you as a buyer should there be any issues with the property after your purchase. And much, much more. We can definitely explore that information further in one of our next meetings.

So, all I ask is that before you make a final decision, you would allow me to share what we have to offer you after I learn more about your needs and situation, because the added advantage of working with us is we offer customized solutions and more services than most brokerages, and paying attention to your needs, wants, and desires is critical to ensuring we provide you services that help you get the home you desire for the right price and on your time frame. Does that sound fair?

#### Gloria

That sounds great. Thank you for sharing that information. What else do you need from me?

#### Cecilia:

I just have a couple more questions and then what I would like to do is set up an initial consultation to go over your answers from the workbook to ensure I have a full understanding of your needs, and share some vital information with you as you consider your options so you can make an informed decision.

Now, let me ask you... How will you be paying for your purchase? If you are financing, have you already connected with a lender?



#### Gloria

Yes. We filled out an application online with ABC Lending, and we got prequalified for \$400,000.

#### Cecilia:

Great! When you say "prequalified," did the lender ask you for bank statements, prior tax returns, or any additional documents?

#### Gloria

No. We just filled out the application online and input my husband's income and some other basic information. In about five minutes we got a notice saying we were prequalified.

#### Cecilia:

Thank you. Before we tour homes, you will need to contact the lender to get a pre-approval letter, which is different than a pre-qualification. Pre-qualification is a basic check to see if you might be eligible for a loan, much like a credit card prequalification you may receive in the mail. However, a pre-approval is much more accurate since it digs deeper into your financial situation. While it may feel invasive, you will need this before you can be approved for any loan, and it also gives us a more accurate figure to work with so I'm not wasting your time looking at homes that may be out of your approved price range.

I will be happy to help you work with the lender to ensure you get your preapproval letter, if you would like?

#### Gloria

That would be helpful because this home buying process is already scaring me to death! And I don't feel like we know what we are doing. We need someone who can help us through the stages since we have never bought before.

#### Cecilia:

Well you came to the right place. As part of our full-service commitment to you, I will help you every step of the way through your selection and buying process. I will be your partner in helping you understand the process, explore options, address any issues or challenges we may face, and hold your hand through the entire process, so you can rest easy knowing we are here for you. While I cannot promise there won't be stressful moments, I will do all I can to make it as stress-free as possible, if you decide to work with me.

Now, how would you like for me to provide you the workbook. Would you prefer a digital copy you can fill out online or would you prefer a printed copy I can either drop off or mail?

#### Gloria

If you could just email it to me, that would be great!



#### Cecilia:

Very well. I would be happy to do that. To confirm your email address is gloriam@me.com, correct?

#### Gloria

Yes, that is correct. Thank you.

#### Cecilia:

It's my pleasure. I will send it to you immediately after this call. If you don't receive it within 15 minutes, please check your spam folder to make sure you received it. In the meantime, I would like to set up a time for our initial consultation. I have Thursday at 12:00 noon or Saturday at 10:00 AM available. Which one of those would be most convenient for you?

#### Gloria

I think Saturday works perfect for me.

#### Cecilia:

Perfect. I will schedule you for Saturday and send you a calendar invite via email. To help you prepare, please have your workbook complete as much as possible so we can go over the answers together. The purpose of this meeting is simply for me to learn more about your needs, wants, and desires when it comes to buying your first home. Please be sure your husband also attends all meetings. And once you complete the workbook, please save it and send me a copy of it via email.

This will be a rather short meeting, lasting no more than 10-20 minutes. After we discuss your needs, I will provide you with a complementary Buyer's Guide that is jam packed with information to help you understand the home buying process, terminology, and important details to help you prepare for your new chapter. This is a free gift of very useful information.

Lastly, we will set up a strategy session with both you and your husband to go over some initial properties I researched to ensure I'm on the right track and looking for the right homes based on your criteria. At that time I will also share with you more details about our services, customized solutions, and legal requirements to get started on your home buying journey.

You will also receive reminders about our upcoming meetings. All I ask is if anything changes, please let me know so we don't waste anyone's time. Does that sound fair?

#### Gloria

Yes, I'm excited to learn more. We'll talk to you on Saturday! And we'll work on getting the workbook completed by then. Thank you.

Cecelia finishes the phone call and sends Gloria a calendar invite with a Zoom link as well as an email with either a link or an attachment of the Buyer's Workbook.

## SAMPLE BUYER SCRIPT INITIAL CONSULTATION

Gloria and her husband, Raymond, join the Zoom call with Cecilia.

#### Cecilia:

Good morning Gloria! And nice to meet you Raymond! How are you both this morning?

#### **Both:**

We are doing well. Thank you.

#### Cecilia:

Great! I received a copy of the workbook that you worked on. Thank you for returning that. Today, we will take a few minutes to go over your answers and I will be asking some clarifying questions as I have them to ensure I understand your needs, wants, and wishes more accurately. So, when I am searching for properties you may consider, I am targeting those that meet the majority of your criteria.

Before we get started, I do want to share that it is very rare that a home perfectly matches the criteria you establish, but during our time today, I will learn more about what your priorities are and what are deal breakers. That way, I don't waste your time looking for homes that you are not interested in.

How does that sound?

#### **Both:**

That sounds great.

#### Cecilia:

Perfect.

Cecilia reviews the Workbook with Raymond and Gloria. Asks clarifying questions. And sets up the next meeting.

#### Cecilia:

Thank you, both, for helping me understand your needs better. This will greatly help me identify potential properties that may be of interest to you. I need a couple of days to research properties and then I would like to schedule an in-person strategy session to review the properties, provide you information about our services and customized solutions to help you find your dream home, and answer any questions you may have at that time. This session will take around 30-45 minutes.

In the meanwhile, I have a gift for you. I am going to send you our exclusive Home Buyer's Guide, which is jam-packed with information about the home buying process, terminology, expectations, and things to consider when looking for your perfect home. I have Tuesday at 1:00 PM available if that works for you.



#### Gloria

Tuesday works well for both of us. Do you want to meet us at our house?

#### Cecilia:

Thank you. I prefer to meet just the two of you at Panera, if that's okay. That will allow us to be in a more neutral, distraction-free location so you don't have to worry about my intrusion and we can focus on your next steps. Based on the information you provided me, there is a Panera located about two miles from your home at 444 Forest Lane. Will that work for you?

#### Gloria

Yes, that works well. We do have a lot of questions since we don't know what we are doing.

#### Cecilia:

Fantastic. The Buyer's Guide will answer a ton of questions and also help you identify more specific questions you may have. I will send it to you via email for both of you to read, and I encourage you to write down any specific questions you may have that are not addressed so we can go over them during our strategy session, if that's okay.

In the meantime, I will begin reviewing properties that fit your criteria that we can review as well, and ensure I'm hitting the target.

Also, please bring your driver's licenses or government photo ID to the next meeting. I am required to confirm your identities and for documentation purposes.

Lastly, I greatly appreciate the opportunity to work with you. I know you have many choices, and if you decide you would like to continue working with me, we will discuss our firm's services and customized solutions during our strategy session. If we both determine we are a good fit to work together, then I will share with you our Agreement that is required to give me permission to work on your behalf, show you properties, communicate with your lender, and negotiate offers once you decide to purchase a home. If we determine we are not a good fit for each other, then you will at least have valuable insight into the home buying process without any further commitment or obligation, and I will be happy to assist you in finding the right agent to meet your needs.

Does that sound reasonable?

#### Both:

Yes, that sounds very reasonable. Thank you and we'll see you then.

## SAMPLE BUYER SCRIPT STRATEGY SESSION

Gloria, Raymond, and Cecilia meet at their designated location for the Strategy Session.

#### Cecilia:

Thank you both for meeting me, today. After reviewing the answers you provided in our last session, I research 4 properties that appear to meet your criteria. We will go over those 4 properties to ensure I'm on the right track in my search. But before we do that, did you have time to read the Buyer's Guide I provided to you and do you have any questions?

#### Raymond:

We did and it was very informative. We are a little confused about the mortgage process and how we get approved for a loan.

#### Cecilia:

Yes, that can be very confusing because there are a lot of layers. However, one of the first steps before we actually tour properties is to get pre-approved by a lender. Before we leave here, today, I can connect you with a lender who will further explain the process, answer any questions, and help guide you through the application and approval process. Will that work for you?

#### Raymond:

That would be great! The whole thing makes me a bit nervous because what if we don't qualify?

#### Cecilia:

I understand. The home buying process can often be stressful and a roller-coaster of emotions - fear, anxiety, joy - all wrapped up together. However, as your trusted advisor, my role is to help make this process as seamless and stress-less as possible. I will be here to guide you through every step of the process, including working with your lender, to ensure the transaction runs smoothly. When we face challenges, we will overcome them together, so you can be assured you are not in this alone and we have your best interest in mind.

In fact, I want to provide you with our Broker Disclosure Agreement. This notice is required to be presented to you so you know what duties I owe you as your representative. As a Single Agent, I will represent you exclusively and commit to dealing with you honestly and fairly, remain loyal to supporting you through this transaction, uphold the utmost confidence in your personal and private information, obey your wishes as long as they are not illegal, provide you with full-disclosure of all known facts that materially affect the value of your property if I know them, account for all funds, present all offers in a timely manner, and give you the best skill, care, and diligence in this transaction.

How does that sound?



#### Gloria

That's great.

#### Cecilia:

Please take a moment to read this disclosure and acknowledge receipt by signing below.

Now, let's take a look at the properties I found to see if I'm on target with what you are looking for...

They review the properties and determine Cecilia is on the right track.

#### Cecilia:

Great! If you select me as your Advisor, I will research additional options and send them to you via email for review. If you find any that you want to tour, you can let me know and we will schedule a time that works for both of you to review the properties. And if you find any properties on your own, please send them to me so I can dig deeper into the home's history and records to ensure there are not any immediate red flags that may cause concern and let you know.

Next, I want to share with you a little about who we are as a real estate Firm and what services we provide our clients. This will help provide you additional information you need to help make an informed decision about who will represent you in this transaction.

Cecilia pulls out the Buying with Us guide and conducts the presentation. She goes over the details and when she gets to the Menu of Services, she asks "which service best meets your needs?"

Scenario 1 | Gloria and Raymond determine they are not yet ready to move forward.

#### Gloria:

I really like the first option. But, I'm not sure we are quite ready to move forward because Raymond has an important surgery coming up in a couple of weeks so I'm not sure how soon we can look at properties.

#### Cecilia:

I understand. It may take him a few weeks thereafter to recover. That's not a problem. The good news is sometimes it takes us a bit to find the right property, get you preapproved, and ready to move forward. So, if you prefer, while Raymond is recovering, we can work on the pre-approval with your lender, and I can still send you properties to review just so you know what is currently on the market, compare and contrast properties that may interest you, and get a feel for pricing, styles, and features. And then, when you feel ready to tour properties, you will already have the basic requirements completed and will be ready to move forward at your own pace. How does that sound?



#### Gloria

I don't know. I think with Raymond's surgery and dealing with all that we may need to just pause and not do anything just yet. How about we think about it and get back to you?

#### Cecilia:

That is not a problem. I understand that sometimes it all seems overwhelming when life gets in the way of your plan. How about I simply send you a weekly email with a few properties to look over and then when you are ready, we'll connect you with a lender and resume the process at that time?

#### Raymond:

I think that will work well! Let's do that. And then depending on how quickly I recover, we can start looking more seriously at properties then.

#### Cecilia:

Perfect. Thank you, again, for meeting me today. I will send you a weekly email starting next Monday with properties. And I'll check in to see how you are feeling after you have had your surgery.

Cecilia sends weekly emails and finds out when Raymond's surgery is. She sends flowers to the hospital and a simple note that she is praying for and thinking about him as he recovers. A few days after Raymond returns home, Cecilia sends a \$50 gift card for Door Dash and a get well card that simply says "As you recover, please enjoy the convenience of ordering from a favorite restaurant."

Two weeks later, Cecilia send Gloria a \$50 gift card to a massage therapist and a card that says "I'm sure you have been a great caregiver for Raymond while he recovers, so I wanted to send you a little gift, too. Take a load off and enjoy a moment for yourself."

#### TOP OF MIND GIFTING

Aside from the weekly emails featuring various properties, notice how Cecilia is sending small useful gifts. This is her way of staying top of mind and planting seeds that build relationships, show care and empathy, and meets a presumed practical need without ever discussing real estate.

Who knows how long Raymond's recovery will take or if and when they will be ready to buy? Regardless of their timeframe, Cecilia is continuing to show her genuine care for them without ever mentioning real estate or coming across as a pushy salesperson who is insensitive, insecure, and only interested in this couple for their business.

Clients will become loyal to you, when you show loyalty first. You cannot reap a harvest without sowing seed first (gifting), feeding (consistency), and weeding (eliminating bad sales practices and habits).



#### Scenario 2 | Gloria and Raymond determine they want to move forward with option A

#### Gloria:

I really like the first option. Let's do it!

#### Cecilia:

That's an excellent choice! The next required step is to give me your written permission to act on your behalf as not only your Advisor, but also you agent in this transaction.

#### Cecilia pulls out the Buyer Broker Agreement (BBA) and goes over it.

As mentioned during the presentation, the professional fees are 3%. However, I am going to work hard to negotiate with the seller and their agent to contribute or pay for these fees as part of my service to you. If they do so, it will save you some money, and you will only be liable for the difference between the 3% and whatever they contribute.

Cecilia completes the review of the BBA, gets initials and signatures on all pages.

#### Cecilia:

Thank you both for entrusting me with your home purchase. I will send you weekly emails with properties to review. If you decide that any of them interest you, please let me know and I will set up tours and times to see them. If any other real estate agent contacts you, please give them my number and ask them to contact me instead, since we are now in agreement.

The last step in this process is to connect you with a lender to get you started on the preapproval process. This is very important and a critical step in helping us determine how much home you can afford. Whatever the lender approves you for, we will want to look at homes that are about \$20,000 less than your preapproval to ensure you have funds for closing costs.

While you may certainly shop around and use any lender of your choosing, I am happy to connect you with one of the trusted lenders we have worked with in the past if you'd like?

#### Gloria:

Yes, please. We don't know anyone else, so I would rather use a lender you already know.

#### Cecilia:

Certainly. Let's call Michael Brown right now so I can introduce you and he can share with you the steps to apply.



Cecilia texted Michael before meeting with Raymond and Gloria to ensure he would be available to chat with them if they decided to move forward. So, he is expecting her call. He answers the phone.

#### Cecilia:

Hi Michael. How are you? I am sitting with Raymond and Gloria Menendez, who are first-time homebuyers. I wanted to introduce you to them so you can answer any questions about home lending and help them learn the process to get started. Let me pass the phone to them so you can introduce yourself. Thanks.

Cecilia may put him on speaker phone so both can hear what he says. Michael introduces himself and shares with them the process to get started on applying for their home loan, required documents they will need to supply, and how to move forward.

When finished, Cecilia thanks Michael and asks him to send her the preapproval letter once he has it.

Cecilia wraps up the meeting with the Menendezes by thanking them, again, reconfirming her commitment, and starts reviewing potential properties that will work for the couple.

## FORMS CHECKLIST

Initiated by Buyers	Initiated by Sellers
Buyer Broker Agreement (BBA) Buyer Workbook Loan Preapproval or Proof of Funds Copy of Driver's License Foreign Buyers Addendum (FBA) Wire Fraud Notice Showing Agreement (if applicable) Home Inspection Disclosure Sales & Purchase Agreement (SPA) FHA/VA Rider (if applicable) Sale of Buyers Property Rider (if applicable) Insurance Rider Flood Insurance Notice Addenda (if applicable) Walkthrough Inspection Form Loan Commitment	Listing Agreement  Sellers Workbook  Copy of Driver's License  Comparative Market Analysis (CMA)  Residential Listing Data Entry Form  MLS Sheet (after listing is live)  Sellers Property Disclosure (SPD)  HOA/COA Disclosure (if applicable)  Notice to Association  HOA Docs (CC&Rs, ByLaws, Estoppel)  Property Survey (if available)  CDD Disclosure (if applicable)  LBP Disclosure (if applicable)  Flood Disclosure  Flood Insurance Notice (if applicable)  Lead-Based Paint Disclosure (LBP) (if applicable)  Addenda (if applicable)  Compensation Agreement
<ul><li>Inspection Report</li><li>Appraisal Report</li><li>Closing Disclosure (CD, HUD-1, ALTA)</li></ul>	<ul> <li>Required Condo Inspection Reports</li> <li>Seller Net Sheet (optional)</li> <li>Closing Disclosure (CD, HUD-1, ALTA)</li> </ul>

# BUYER MENU OF SERVICES

#### **ENHANCED SERVICES**

- Trusted Advisor w/ Team of Professionals
- Initial Needs Assessment & Property Review
- Property Valuation & Advisory Services
- Lender Selection & Mortgage Pre-Approval Guidance
- · Property Search w/ Alerts
- Scheduling and Hosting Property Tours
- Offer Preparation and Negotiation Assistance
- Contract Review and Explanation
- Vendor Recommendations
- Coordination of Property Inspections and Repairs
- Assistance with HOA and Community Research
- Guidance on Contingencies and Contract Timelines
- Utility Transfer Services
- Legal & Regulatory Compliance Services
- Coordination w/ Closing Agent and Closing Support
- Weekly Updates & Reports
- Post-Sale Support
- Added Benefits & Bonuses

#### **PROFESSIONAL FEES:**

up to 3% of final sales price + \$500 Transaction Fee + Closing Costs (TBD)

#### **PREMIUM SERVICES**

- All Services in the Enhanced Services Package, Plus:
- Detailed Reports on Selected Properties
- Enhanced Property Research
- Personalized Home Tours
- Access to Off-Market Properties (when available)
- Property Preparation (House-Cleaning & Sanitization, Landscaping, Power Wash) Prior to Move-In
- Interior Design and Renovation Consultation Referrals
- Relocation and Moving Services Coordination
- Preferred Partner Discounts
- Home Warranty (if not offered by seller)
- VIP Access to Odyssey Events and Workshops
- Personalized Housewarming and Celebration Event
- Review of Closing Costs and Financial Planning
  Tools
- Coordination with Closing Agents
- · Attorney Review

#### **PROFESSIONAL FEES:**

up to 4% of final sales price\*

- + \$500 Transaction Fee
- + Closing Costs (TBD)

\*Gross commission (GCI)

# BUYER'S AGENT COMPENSATION

#### How Buyer's Agents are Compensated

The recent National Association of Realtors (NAR) settlement has introduced changes affecting how buyer's agents get paid. Here are some potential ways buyer's agents can secure compensation under the new framework:

1

#### **Buyer Direct Compensation**

Buyers agree to pay for their agent's compensation in the Buyer Broker Agreement (BBA). However, depending on the loan type, there may be restrictions, limits, or prohibitions that need to be considered.

2

#### **Commission Split with Listing Agent**

With the NAR changes, traditional commission sharing between the seller's and buyer's agents might still occur, but require more transparency. The Listing Agent may have already negotiated the buyer's agent commission and continue to split the fee. The BA should contact the Listing Agent to see if there is a co-broke fee offered.

3

#### **Seller Concessions**

If the buyer is unwilling or unable to pay the buyer's agent's fee, and the Listing Agent is not offering any form of compensation split, the buyer's agent may request seller concessions to help the buyer with closing costs, repairs, etc. and use the buyer's cash to pay for the buyer's agent's compensation.

#### **Rebate or Credit Incentives**

The state of Florida permits agents to give back a portion of their commission to the buyer or seller as an incentive or reward for using the agent. This may help offset closing costs, while securing the client and ensuring compensation for the agent. Rebates may be offered up to 2% of the Odyssey Partner's net commission income (after split), but requires Team Owner approval and disclosures.

**NOTES** 

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## SELLER REPRESENTATION



## SELLER ACQUISITION



### ESTABLISHING THE SELLER-BROKER RELATIONSHIP

Just like the Buyer-Broker Agreement establishes the relationship between the Firm and buyers, the Seller-Broker relationship is formalized through the Exclusive Right of Sale Listing Agreement ("Listing Agreement"). This agreement clearly outlines the roles and responsibilities of both the Listing Agent and the seller in marketing the property—whether through the open market or alternative channels such as an iBuyer platform, Craigslist, or other advertising mediums.

The Listing Agreement authorizes you, as the Advisor/Agent, to represent the client in marketing and selling their property.

When meeting with a potential seller for the first time, it is essential to:

### ESTABLISH LEGAL CLARITY AND TRUST

Verify that they are not currently under contract or have not signed any agreement with another licensed agent.

Provide them with a Broker Disclosure Form and receive signatures of acknowledgement.

# TIPS TO ATTRACT AND ACQUIRE SELLERS

#### HARNESSING THE LAW OF SOWING AND REAPING

Using many of the same techniques and strategies to obtain buyers, Odyssey's proven strategies to acquire sellers includes a combination of traditional lead-generating methods and more impactful organic relationship-building activities - many of which are the same as buyer lead generation, but may be expanded.

#### 1 Establish a Professional Online Presence

Social media is a cost-effective and powerful tool for attracting sellers, too. Build an engaging online presence by creating content such as:

- Market updates
- Tips, tricks, and home improvement ideas
- Success stories and property tours
- DIY projects
- Local spotlights on preferred vendor partners, contractors, etc.

#### 2 Expand Your Sphere of Influence (SOI) Through Networking

Growing a network requires consistency, intention, and action. Your SOI includes family, friends, past clients, vendors, and community groups. Develop your network by:

- Attending and participating in local events
- Supporting charitable activities and sports teams
- Joining organizations like the Chamber of Commerce, Toastmasters, and BNI
- Connecting with groups through <u>Meetup.com</u> or creating your own community group

#### 3 Offer Educational Workshops and Webinars

Build credibility and relationships by hosting educational events on topics such as:

- · Staging Your Home for Higher Earning Potential
- How to Buy Your Next Home Before You Sell Without Double Payments
- Get Your Home Market Ready with these DIY Tips and Tools or Our Concierge Services
- How to Beat Out Your Competition on the Market
- Cash Offers: The Pros and Cons of Selling Your House Fast

Tie it with a wine & cheese event or some other type of social gathering at a restaurant with a free gift card or prize raffle drawing for participants who must attend to win.



#### 4 Offer Exclusive VIP Invitation-Only Events

Offer homeowners an exclusive pre-market opportunity where you showcase their home to a VIP network of buyers and brokers - like an open house - before it hits the MLS.

Promote it as a "secret market" where homes get the first wave of competitive offers before going public. Use a social media teaser such as "A home in YOUR neighborhood is about to hit the market... could this be your dream home? Join us for an exclusive event to learn more about this home before it goes public."

#### 5 Create Cinematic Video Marketing

Create a high-quality cinematic video featuring the seller's home as the "star" of a short film that includes drone footage, virtual walkthrough, and lifestyle shots with background music. Run targeted social media ads with a headline, "How We Market Your Home like a Luxury Listing" regardless of price.

#### 6 Lead with Our Dedicated Concierge Services

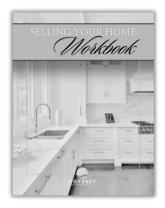
ECHO: Elite Concierge & Hospitality by Odyssey, is our premier concierge services that provide both buyers and sellers an exceptional experience leading up to and after closing. As part of ECHO, we anticipate client needs, provide personalized solutions, and offer seamless support as they transition from one home to another.

This includes options such as:

- Home Staging & Market Preparation
- Buy Before You Sell Services
- Home Cleaning Services w/ detailed interior and basic power washing
- Moving & Relocation Assistance
- Utility Transfer Services
- Housewarming Celebrations

### SELLER LEAD GENERATION TOOLS & RESOURCES

Generating organic leads for your real estate business means attracting potential sellers naturally through value-driven strategies, tools, and resources. Some of the tools available include:



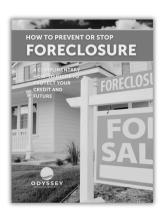
#### SELLING YOUR HOME WORKBOOK

Odyssey's exclusive "Selling Your Home Workbook" is a six-page questionnaire, crafted to help sellers describe the features, amenities, and details about their home so you, as an Advisor can best design a marketing plan to promote their home in a competitive market, explore options, and create solutions.



#### **HOME SELLER GUIDE**

This exclusive, comprehensive resource is designed to provide immense value to prospective sellers. Built as a step-by-step roadmap, it guides sellers through every stage of the selling journey after completing the Workbook. From understanding your role as their trusted advisor to exploring sales options—including cash buyers, traditional listings, and private sales—this guide equips sellers with the knowledge they need to make informed decisions and achieve a successful sale.



#### HOW TO PREVENT OR STOP FORECLOSURE

Designed for homeowners facing life changes and financial challenges, this essential guide provides valuable insights for those who need to sell quickly. It explains the true cost of foreclosure, its long-term impact on credit, and the challenges it creates when buying or renting in the future. More importantly, it explores alternative solutions to help prevent foreclosure and protect credit, while outlining how we can assist in navigating this difficult situation.



These wire-bound books are enclosed in our exclusive Odyssey Seller Success Pack which may include additional materials such as:

- Listing Agreement & Disclosures
- Advisor Bio & Brag Sheet
- Preferred Partner Vendor Flyers
- Home Warranty Information & Application
- Odyssey Giveaways | Gifts | Swag
- · Thank You Card
- CMA
- Relocation or Neighborhood Guide (Custom-Designed)
- Business Card





SELLING WITH US is Odyssey's visually engaging, full-color Seller's Presentation, designed to complement the Seller's Guide and Selling Your Home Workbook as part of the Seller Success Pack. As the third book in the series, it highlights our expertise, showcases the value we provide, and educates sellers on what to expect when partnering with us. Our Menu of Services offers clear, transparent options, outlining available services, associated pricing, and detailed descriptions—ensuring sellers know exactly what they're investing in and the benefits they receive.



**LEARN**about your seller's needs and property



**EDUCATE** and inform your seller on the process and set expectations



EARN
your seller's trust and
business by creating value
and highlighting our services

#### **PROCESSING**

### SELLING WITH ODYSSEY

#### 1 | First Point of Contact

- Customer contacts you or is transferred to you by phone, email, or inperson
- **BEST PRACTICE:** Respond within 15-20 minutes
- Input contact information into CRM
- Complete the first page of the Workbook and send the Workbook to the customer for completion by the next appointment
- Schedule 1st Meeting | Initial Consultation



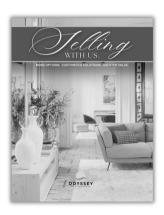
#### 2 | First Meeting | Initial Consultation

- Ask the customer to return the completed Workbook back to you. If the Workbook is incomplete, finish it with the customer
- BEST PRACTICE: Meet in person in a public location or via Zoom
- Review Workbook answers and ask subsequent questions for clarification
- Thank them for the information and explain that at the next meeting you
  would like to visit and tour their home to evaluate how you can be of
  service.
- · Present the Seller's Guide
- Schedule 2nd Meeting | Strategy Session

### HOME SELLER WARTHOOD AND TO FOUND TO CHILD MANUAL CONTROL OF THE PROPERTY OF T

#### 3 | Second Meeting | Strategy Session

- Meet customer at their home. Bring flowers or a thank you gift.
- Tour the home and mentally document layout, design, issues.
- Conduct the Listing Presentation using "Selling with Us."
- If the customer is ready to move forward, present the Listing Agreement and select the option from the Menu of Services.
- If doing a cash offer, do a video documentary of the property w/ photos to upload
- Schedule professional photography, installation of a lockbox and sign. Ask for a set of keys.



#### 4 | Listing Preparation

- Schedule home prep w/ admin
- Schedule photography, lockbox and sign installation with Field Services
- Complete MLS Input Form and upload to MLS within 5 days of Listing
- Set up ShowingTime





#### 5 | Offer Review & Acceptance

- Once a buyer submits the Sales & Purchase Agreement (SPA) offer, review it for completion. If complete, submit it to the seller for their review and acceptance, counter-offer, or denial.
- Once accepted, get signatures and send executed contract back to the buyer's agent for delivery.
- Open escrow with the title company and submit the contract.
- Upload the contract & disclosures to the TMS and notify the Transaction Coordinator.



#### 6 | Prepare for Closing

- Order the Moving Kit and Closing Gift through your Admin
- Check the TMS daily to stay abreast of changes, approaching deadlines, comments, etc. to ensure the transaction is on schedule to close
- The TC will coordinate inspections, appraisals, and any repairs negotiated in the contract and work with the Closing Agent to process the paperwork
- Schedule sign and lockbox removal before closing day.



#### 7 | Attend Closing

- Closings may be done in-person at the title company office or remotely at a different location with a mobile notary contracted with the title company
- · Attend the closing with the closing gift
- After closing is finalized, give the closing gift to the client and thank them for using you as their trusted advisor
- Place client on the Top-of-Mind List with the Admin and retain regular contact with them post-closing



#### **BEST PRACTICES**

- Attempt to be the first to close so you can give the keys to the closing agent for delivery to the buyers once they close.
- Attempt to avoid closing with buyers and sellers together. This always puts both parties in an awkward and uncomfortable position.
- Attempt to schedule the closing early in the week (Mon-Weds) to avoid banking delays and do it earlier in the day (9 AM - 12 PM).

## SAMPLE SELLER SCRIPT FIRST POINT OF CONTACT

Mark Simpson contacts the office to see how we can help him sell his home.

Receptionist/Agent answers the phone.

#### Receptionist

Good morning and thank you for calling Odyssey Real Estate Services. This is Jenny. How may I help you?

#### Customer

Hi Jenny. I am looking to sell my house in Boca Raton, and wanted to see what you had to offer.

#### Jenny

Certainly. I would be happy to help you. But, may I ask, what is your name?

#### Customer

My name is Mark Simpson.

#### Jenny

Thank you, Mark. Have you reached out to other agents or is the first phone call you've made?

#### Mark

No. This is the first time I've called anyone.

#### **Jenny**

Great! Thank you for reaching out. If you don't mind, may I ask you a couple of questions so I can ensure I get you to the right person?

#### Mark

Of course. What would you like to know?

#### Jenny

First, may I have the address of the property you are interested in selling?

#### Mark

1234 SE Jumper Street, Boca Raton, FL 12345.



#### Jenny

Perfect. How soon are you planning to sell?

#### Mark

As soon as possible. I just got offered a job in Atlanta and need to move within 30 days.

#### Jenny

Thank you for sharing that information. As a full-service firm, we specialize in helping our clients with personalized solutions because we know everyone has unique needs, and I am certain we can help you move quickly within that timeframe. Is anyone else on the deed that will be another decision-maker in this process?

#### Mark

No. Just me.

#### Jenny

That certainly makes it simple. We have a highly trained Advisor in the Boca Raton area who will be able to assist you. If you have time right now, I would be happy to connect you with her. Her name is Anika. Would you like for me to connect you and she can discuss this with you further?

#### Mark

Yes. That's fine.

#### Jenny

Great! Thank you, Mark. Let me see if I can get her on the line and introduce her to you. Please hold for a minute and I'll come right back to you.

Jenny calls Anika and shares the information she has already collected. She returns to the call with both Mark and Anika on the line and introduces them to each other, reassuring Mark that he is working with one of the best and announcing she will take over.

#### Anika

Good morning, Mark! It is a pleasure to meet you. Jenny shared with me that you are looking to move within the next 30 days due to a job relocation, so timing is of the essence. And I understand you will be the only decision maker and name on the deed, correct?

#### Mark

Yes. That's correct. Is it even possible to sell my house in that short of time frame? That has me concerned, because I really need the money to relocate.



#### Anika

Yes! The good news is we do have options for people in your position who need to sell quickly. In order to determine the best options to offer you, I need more information about the property itself. Based on what you are telling me, because timing is of the essence, we need to move quickly to get your house ready to sell. I am going to send you a short and simple workbook that you can fill out to the best of your ability. This workbook focuses on identifying your needs, as well as helps provide me with much needed details about the property so I can offer you the service that you need and not waste your time with services you don't.

Let's schedule a time for us to go over the workbook answers so I make sure I understand exactly what we need to do to market your property and get it sold quickly. How does that sound?

#### Mark

That sounds great!

#### Anika

Perfect. How would you like to receive the workbook, in digital format you can print off or fill out online, or would you like for me to mail you a physical copy, which will clearly take a few days?

#### Mark

Please send me the digital version that I can fill out online. You can send it to mark@yahoo.com.

#### Anika

Great. Please complete as much of it as possible and only the sections that apply to your property. Then, when we meet, we can go over the answers, together. How does Monday at 1:00 PM sound?

#### Mark

Monday works. Where do you want to meet?

#### Anika

Let's meet at Starbucks on 34th Avenue and Jonesboro Way. After we go over the answers, I will share with you some options to consider and provide you with more information at that time so you can make an informed decision. By the way, you mentioned you are moving to Atlanta. To help make your transition smooth, I would be happy to assist you in helping you find your new home. I work with a broad network of real estate professionals, and I would be happy to connect you with one of my colleagues in the industry to not only help you identify your new property, but work with me to ensure we close on both your new home and your current home simultaneously so you don't have any hiccups or miscommunications in the process. Would you like for me to provide you with options in Atlanta, as well?

#### Mark

Oh, yes! That would greatly help me out. Thank you, I appreciate the help.



#### **Anika**

Absolutely. That's what I'm here for! We pride ourselves on making the transition and transaction as smooth and seamless as possible for you because we know moving can be overwhelming.

Let me send you the workbook, and then on Monday, when we meet, I'll have more specific details to offer you. In the meantime, have a great rest of your week, and look for that email in the next 10-15 minutes. If you don't receive it by then, please check your spam folder and let me know if you don't get it.

Thank you for contacting Odyssey, and I look forward to meeting you in person on Monday!

#### Mark

Sounds good. I look forward to meeting you on Monday, as well. Have a great day.

While Mark works on the workbook, Anika submits Mark's property to cash buyers to get an initial approval and pre-offer. She runs a CMA on the property and puts together a comparison.

## SAMPLE SELLER SCRIPT INITIAL CONSULTATION

Anika and Mark meet via Zoom to go over the workbook and Anna's findings.

#### Anika

Hi Mark. Thank you for taking time to visit with me. I am looking forward to going over your answers and sharing some additional insight I think may help you. Should we get started?

#### Mark

Yes, that sounds good. I'm anxious to learn more!

Anika and Mark review the answers. As it turns out, the house needs a little work because it had some water damage from a previous leak. Although the repair has been fixed to stop the leak, a wall needs to be repaired inside the home.

#### Anika

Based on the information, I think there are a couple of options that I can offer you. If you decide to pursue any of these options, then I would like to come out to your home and take a tour to get a better assessment of the damages, and share the next steps to get you moved, if that is okay.

#### Mark

Yes, that sounds good. When do you want to do that?

#### **Anika**

Knowing how pressed you are for time, are you available tomorrow at noon? I have that time open on my calendar.

#### Mark

Yes, that works for me.

#### Anika

Great. In the meantime, I would like to provide you with our Seller's Guide, a detailed guide to help you understand the sales process, what to expect, and how you can prepare your home for listing. If you will take time to review the information, it will answer a lot of questions you may have. And then if you have any additional questions, we can go over them tomorrow when I visit your home. How does that sound?

#### Mark

That sounds great. I'll see you tomorrow.

### SAMPLE SELLER SCRIPT STRATEGY SESSION

Anika arrives in Mark's neighborhood about 15 minutes early. She drives around the block to get a feel for community and any selling points she can include in the listing. She then arrives at Mark's house a couple of minutes early and brings him a gift card to Bass Pro Shops because he mentioned he loves to fish. She knocks on the door and takes a step back. Mark answers the door.

#### Mark

Hello Anika. Please come in.

#### **Anika**

Thank you for having me. I brought you a small gift because my mother always taught me that when you are a guest in someone's home to bring a small hospitality gift, and you mentioned you love to fish, so I brought you a small gift that hopefully you can use.

#### Mark

That's very kind! Thank you!

#### Anika

My pleasure. Do you mind if I sit my stuff down at the kitchen table?

Mark leads Anika to the kitchen where she place her items.



When meeting with a client, ask to sit at the kitchen table or bar rather than the living room—unless the host insists otherwise. A table provides a more structured setting for presenting information and securing signatures if the client chooses to move forward. Living rooms tend to be more relaxed and informal, which can make it harder to maintain focus and engagement.

#### Anika

Would you mind taking me on a tour of your home and pointing out some of your favorite features and any updates or work you've done on the property?

#### Mark

Certainly! Let's start here, in the kitchen.

Mark guides Anika throughout the home, pointing out his features, updates, and the area that needs repaired from the previous water leak. Anika asks poignant questions and makes a mental note of the layout and features, before they both return to the kitchen table.



Anika

Thank you, so much, for the tour. That helps me tremendously! This gives me an idea of how to strategically market your home to find the right buyer. With that in mind, I printed out a Comparative Market Analysis or CMA, which identifies comparable properties in your neighborhood that are currently listed on the market. These are your current competition. It also shows properties currently under contract, which gives us an idea of how quickly homes are moving in this area. But, the most important comparison are the homes that recently closed or sold. This data tells us what the current and specific market conditions are for this area, as well as what consumers are willing to pay for homes in your neighborhood.

This information is valuable in helping you determine the right price to list your home, because at the end of the day, the market dictates the price consumers are willing to pay.

As you see, there are five homes listed that are very comparable to your property in size, age, structure, design, and location. Two have recently sold, one is currently under contract, and the other two are currently on the market.

Based on initial data, presented in this report, it estimates your home could list between \$368,000 and \$425,000. While the active listings show us what your competition is currently listed at, we don't know if the homes will sell for the price listed, so that doesn't mean much when it comes to pricing. However, we learn how long they have already been on the market, which is a good indicator if the homes are priced correctly depending on the days on market. Pending or under contract listings are the same, because we don't yet know if the offer the seller accepted is full-price or different than the list price. But, it does give us a good idea of how long the home was on the market before it received an acceptable offer. Closed or recently sold homes are our best indicator, because it provides us solid data of what the home was listed for and what the final sales price was, as well as how long the home was on the market. This indicates what buyers are currently looking for and the price they are willing to pay in this community.

Anika continues to review the report with Mark and asks him if he has any questions. She then pivots into the Seller's Presentation.

Anika

I want to take a moment to show you how our Firm works and how we offer full-service, personalized solutions to meet our client's unique needs. But first, did you have an opportunity to review the Seller's Guide I gave you, and do you have any specific questions about the process or how to prepare your home for sale?

#### Mark

No. Not really. It answered most of my questions. I am just curious about how much you charge for your services and what options you guys provide.

#### BUYER SAMPLE SCRIPTS CONT'D



Anika

I am glad you asked, because that's what I am going to go over now.

Anika goes through the presentation and goes back to the Sellers Menu of Services and shares the responses she received from her cash offer inquiries.

#### Anika

Considering the fact you are pressed for time in your move, I took the liberty of submitting your property to our cash buyers to see if any of them would offer a preliminary offer before we met. Three of them responded. Keep in mind they are typically lower than what you would likely list your house for on the open market, but some of the advantages to a cash offer is the convenient, hassle-free opportunity to close fast and you don't have to do any repairs, such as fixing the wall where you have some water damage. You can basically move without having to worry about cleaning the house or doing anything to it to make it showroom ready, and don't have to wait for it to sit on the market for any period of time, which works to your advantage since you need to close and move quickly.

Based on the CMA, the average days on market for the comparable homes in this neighborhood, homes were on the market an average of 84 days before they sold, so that indicates homes are taking almost three months to move in this area. Considering you need to move in 30 days, you have a couple of options, including these cash offers.

The first offer is from Offerpad. They are initially offering \$325,000. The second is Opendoor, and they are offering \$326,000. The third one is an individual investor offering \$330,000. All of them can close in 14-21 days with no other contingencies.

The second option is if you decide to list the home on the market and try to get a higher sales price, we can help you repair the wall for no up-front costs through our concierge services. We work with a partner that has their own contractors and they can view the damage, submit a quote, and typically make the repairs in a short period of time so your home will be ready to list quickly. Plus, they don't require any up-front or out-of-pocket funds to pay for the repairs. Instead, you home's equity pays for the repairs through reimbursement out of the net seller proceeds at closing.

Which option would you like to prefer?

#### Mark

While I really would prefer to make the most money possible out of the deal, I don't think timing is on my side to wait for the house to sell. So, I guess I would like to pursue the highest priced cash offer.

#### Anika

I think that's a good choice. Based on your decision there are only two other steps in this process. I need to take photos and a video tour of your home to submit to the investor because they won't be coming to the house. This will give them more specific details about the condition of the home that they can review and submit to us a final offer. Depending on what they see, the preliminary offer may increase or decrease, but I'm going to do everything I can to get them to increase their offer...



#### Anika

The second thing we need to do is for you to give me permission to act on your behalf in legally representing you in this transaction. With our Exclusive Listing Agreement, this details my role and commitment to serving you as my client, and your role as the seller.

As I mentioned, when you hire me as your Advisor, you are also hiring our team of professionals to help you navigate the over 185 steps to selling your home. With cash offers, our fee is 3% of the sales price. However, often the investor may contribute toward that fee, so if they do, you would only pay the difference up to 3%.

While I tour the home, I am going to let you review the Agreement. When I come back we'll go over them and I'll answer any questions you may have before signing anything. While I tour the home, I will be narrating a video, so if you hear me talking to myself, just ignore me.

Does that sound good?

#### Mark

Yes, that will work.

Anika hands him the Listing Agreement and while he reviews it, she tours the home, taking videos and photos starting at the front door and moving throughout the home, narrating the videos. Photos of the mechanical unit labels to identify age and condition are critical. All will be uploaded to a specific platform or sent to the investor for further review.

Anika returns to Mark after the tour.

#### Anika

Thank you for allowing me to do that. Do have any specific questions after reviewing the Agreement?

#### Mark

No. I think it is pretty clear.

#### **Anika**

Great. If you come up with any questions after this, please don't hesitate to contact me, and I'll be happy to answer them. My business card is in the folder I am going to leave you. After you sign, I will send you a final executed copy for your records. The last thing I will need from you is for you to review the required disclosures. As I mentioned in the presentation, we provide sellers with legal protection through Seller's Shield. I will send you a link so you can complete the online Disclosures required to activate that protection. This will take you about 20-30 minutes to complete.



#### Mark signs the Listing Agreement.

#### Anika

Thank you, so much for entrusting me with selling your home. I will submit the video and photos I took to the cash buyers to get a final offer and will let you know when that comes in. It usually takes 2-3 days to hear back from them. Once we receive their final offer, you and I will review it. If it is acceptable, you will sign the offer and your home will be under contract.

In the meantime I will have our Admin order your Moving Starter Kit, so you can start packing! Again, if you have any questions, please don't hesitate to contact me. And thank you, again, for inviting me to your home.

#### Scenario 2 | Mark Chooses to List His Home Rather than Accept a Cash Offer

#### Mark

I think I would rather list the home. Even though I need to move in 30 days, I can stay with friends until the house sells. But, I definitely would need help with the wall repair.

#### Anika

No problem. We can definitely help you. Based on the data in the CMA, there are a couple of ways you can consider how much to list your home for. First, you can find a happy medium based on what you would like to get out of the home. Second, you can moderately price your home slightly lower than the competition, which could generate more interest and possibly get you a higher price in the end.

Based on that, how much would you like to list your home for?

#### Mark

I think \$399,000 seems reasonable. I still owe \$175,000 on the property, so that will give me a nice cushion to pay it off and help me with a good down payment on my next home.

#### Anika

That sounds like a great idea. The next step is to give me permission to represent you in this transaction and act on your behalf to negotiate terms and conditions and help you navigate the sales process. With our Exclusive Listing Agreement, this details my role and commitment to serving you as my client, and your role as the seller.

As I mentioned, when you hire me as your Advisor, you are also hiring our team of professionals to help you navigate the over 185 steps to selling your home. Reviewing the Menu of Services, which option do you prefer?



#### Mark

I think I would like the most popular option for 6%.

#### Anika

Great. Let's go over the Agreement and complete it together.

Anika and Mark go over the Agreement and she fills in the blanks. Mark signs the Listing Agreement.

#### Anika

Thank you, so much for entrusting me with selling your home. The next step is to get your home ready to list. I will reach out to our contractors and set up a time where they can come out and look at the wall that needs repair so they can submit a quote. If you agree with the quote, you'll simply sign it and they'll set up a time to start working.

Because they are initially paying for the work to be done, they are usually really quick to complete the project, while still performing high quality services. This will also give you time to pack and start moving your things. Do you need help with moving or storage?

#### Mark

I have some buddies who can help me move, but I definitely need to look into a storage unit.

#### Anika

The good news is our concierge can help you with that, too! We can get quotes for you to either move your stuff into a storage facility or have a moving container delivered to your driveway for you to fill. Once you are done filling it, you simply notify them to pick it up and they'll store it until you move into your new home. Then they will deliver the container to your new home so you can unload and unpack.

Would you like quotes on both options so you can decide what works best for you?

#### Mark

Yes, please. That sounds good.

#### **Anika**

I will touch base with our Admin and they'll get us quotes. Secondly, once we get the repairs completed, we will schedule the photographer to come in and take professional photos so we can get the property listed and ready to market.

# ODYSSEY SALES MODEL

#### **COMMISSIONS** ► **PROFESSIONAL FEES**

In our approach, we aim to elevate the perception of compensation within the real estate industry. While commonly referred to as "commissions" in sales, we distinguish it as "professional fees." This term reflects the expertise of our agent partners, aligning with the compensation structures seen in professions like doctors and lawyers. It underscores the value of their specialized knowledge and dedicated service.

### professional fees

#### **COMMISSIONS RE-DEFINED**

Odyssey operates unconventionally, challenging norms and surpassing limitations within the real estate industry. Our appreciation for Team Partners is reflected in our competitive compensation model, delivering comprehensive services to our clients while eradicating objections. Through our Seller Menu of Services, we generously reward our Partners. This model empowers sellers to select from a transparently priced array of menu options, incorporating value-added services, ranging from 5-6% of the home sales price, plus affiliated fees. Our buyer's options range from 2-4% of the sales price.





As clients recognize the value of the provided services, our Partners excel, leading to a positive client experience and substantial compensation for our dedicated team.

#### **Transparent Pricing**

Clients know exactly what they're paying for and what to expect.

#### Full Accountability

We deliver what we promise, building trust and confidence with our clients.

#### **Tailored Options**

Clients select options that align with their needs, goals, and ambitions.

#### Referrals -

Clients can confidently refer us to others because of their experience.

### ODYSSEY SELLER OPTIONS

**Cash Offer** 

Off-Market Listing

**Private Sale** 

Off-Market Listing

**Traditional Sale** 

On-Market Listing

menu of services

HIGH VALUE + LOW FEES = HIGHER COMPENSATION FOR YOU

#### ESSENTIAL SERVICES -

- Trusted Advisor w/ Team of Professionals
- Initial & Ongoing Market Analysis (CMA)
- Property Valuation & Advisory Services
- Professional Photography + Video Tour
- MLS Listing, Lockbox, & Yard Sign
- Bi-Weekly Email & Text Campaigns
- Open House Options | Virtual Open House
- Social Media Marketing Campaigns
- Showing Coordination
- Exclusive Representation & Negotiation
- Contract Management
- Legal & Regulatory Compliance
- Closing Support
- Weekly Updates & Reports
- Post-Sale Support

#### **ENHANCED SERVICES**

- Everything in the Essential Services Package, Plus:
- Professional Aerial/Drone & Extended Video
- Staging and Renovation Consultation Referrals
- Paid Social Media Ads
- Direct Mail Marketing to Surrounding Neighborhoods
- Virtual Staging Options
- Broker Open Houses
- Utility Transfer Assistance
- 1-Yr Home Warranty for Buyers w/ \$50,000 Seller Insurance Protection
- 2-Yr Seller's Shield Legal Protection (\$30K)

### MOST POPULAR

#### PREMIUM SERVICES -

- Everything in the Enhanced Support Package, Plus:
- Listing Preparation (House-Cleaning, Landscaping, Locksmith Services, Power Wash)
- Listing Agent On-Site for all Showings
- Exclusive Open House (by invitation only) - Catering & Entertainment Booking (additional charge)
- Relocation and Moving Services Coordination
- Confidentiality & Non-Disclosure Management
- Additional 2-Yr Seller's Shield Legal Protection (\$75K)



#### **PROFESSIONAL FEES:**

5% of final sales price\*

- +\$500 Transaction Fee
- + Closing Costs (TBD)
- 2% to Buyer's Agent
- 3% to Listing Agent\*

#### . FEES: PROFESSIONAL FEES:

6% of final sales price\*

- +\$500 Transaction Fee + Closing Costs (TBD)
- 2.5% to Buyer's Agent
- 3.5% to Listing Agent\*

#### **PROFESSIONAL FEES:**

7% of final sales price\*

- +\$500 Transaction Fee
- + Closing Costs (TBD)
- 2.5% to Buyer's Agent
- 4.5% to Listing Agent\*

\*Gross Commission Income (GCI)

#### RETAINER -

Odyssey Partners may charge clients a retainer for services that will be credited to the buyer at closing. This retainer will be non-refundable and applies to partner's compensation and subject to applicable splits.

<sup>\*</sup>Transaction fees are the responsibility of the agent. However the agent may elect to charge the fee to the client as part of the contractual agreement or split the charge with the client.

# SELLER CASH OFFER PROGRAM

#### Partnering with Premier Cash Buyers: A Odyssey Real Estate Services Advantage

The Odyssey Real Estate Services (Odyssey) collaborates with a diverse network of investors and cash buyers, including iBuyer partners such as OfferPad, OpenDoor, and several private investors. Our cash buyers typically consist of investors and luxury home buyers. Investors often seek properties to generate rental income or for renovation and resale opportunities. The benefits to sellers include:

- √ Convenient & Flexible
- √ Faster Closing (7-21+ Days)
- √ No Finance Contingencies
- √ No Buyer Contingencies
- ✓ No Hassles
- √ Lower Closing Costs

- √ Bypass the Market (Uncertainty)
- √ No Showings
- √ No Appraisals
- √ No Repairs or Cleaning
- √ Less Risk

#### CASH OFFER OPTIONS MAY INCLUDE:

#### Cash Sale -

Typically around 80% of market value.

#### Guaranteed Lock

Test the market with a traditional sale with the assurance of a backup cash offer.

#### Leaseback -

Sell the home quickly but gives the seller time to move. Works well for sellers who are waiting to close on new home.

#### ····· CONS

- **✓** Lower Purchase Offers (60-90% of fair market value)
- √ Property May Not Qualify
- $\checkmark$  Additional Fees May Apply
- $\checkmark$  Limited Negotiation Leverage



While cash is often advantageous in real estate transactions, sellers frequently reject cash offers as they typically fall short of the full asking price. However, with comprehensive due diligence, a thorough Comparative Market Analysis (CMA), and a careful assessment of associated fees and closing costs, a lower cash offer may ultimately yield higher net proceeds for the seller. This option can sometimes be more financially advantageous than a traditional on-market listing.

### HOW TO PROMOTE & DO A CASH OFFER

#### Partnering with Premier Cash Buyers: A Odyssey Real Estate Services Advantage

The Odyssey Real Estate Services (Odyssey) collaborates with a diverse network of investors and cash buyers, including iBuyer partners such as OfferPad, OpenDoor, and several private investors. Our cash buyers typically consist of investors and luxury home buyers. Investors often seek properties to generate rental income or for renovation and resale opportunities. The benefits to sellers include:

- √ Convenient & Flexible
- √ Faster Closing (7-21+ Days)
- √ No Finance Contingencies
- √ No Buyer Contingencies
- √ No Hassles
- √ Lower Closing Costs

- √ Bypass the Market (Uncertainty)
- √ No Showings
- √ No Appraisals
- √ No Repairs or Cleaning
- ✓ Less Risk

#### ······ CASH OFFER OPTIONS MAY INCLUDE:

#### Cash Sale -

Typically around 80% of market value.

#### Guaranteed Lock

Test the market with a traditional sale with the assurance of a backup cash offer.

#### Leaseback -

Sell the home quickly but gives the seller time to move. Works well for sellers who are waiting to close on new home.

#### ····· CONS

- **✓** Lower Purchase Offers (60-90% of fair market value)
- √ Property May Not Qualify
- √ Additional Fees May Apply
- $\checkmark$  Limited Negotiation Leverage



While cash is often advantageous in real estate transactions, sellers frequently reject cash offers as they typically fall short of the full asking price. However, with comprehensive due diligence, a thorough Comparative Market Analysis (CMA), and a careful assessment of associated fees and closing costs, a lower cash offer may ultimately yield higher net proceeds for the seller. This option can sometimes be more financially advantageous than a traditional on-market listing.

### PRIVATE SALE OPTION

#### Sell Discreetly, Off-Market, and On Seller's Terms.

Clients may select to sell their property privately and not advertise on the MLS. This off-market option works well for sellers who already have a buyer identified or distinguished clients who have a luxury or custom-built property, and require discretion and confidentiality.

#### Advantages

- Discreet and Confidential
- Less Competition
- Faster Process
- Fewer Showings
- More Control over Terms
- Select Group of Buyers

#### **Disadvantages**

- Limited Buyer Pool
- Potentially Lower Sales Price
- Less Market Exposure
- May Take Longer to Find the Right Buyer
- √ May Require a Non-Disclosure Agreement (NDA)
- √ May Require Listing Agent to Be at Every Showing
- √ Follows the Same Procedures as Traditional Sale
- √ Requires MLS Exemption Form

## SELLER CUSTOM SOLUTIONS



#### **BUY BEFORE YOU SELL**

Odyssey's partnership with Knock lets homeowners buy their next home before selling their current one—eliminating the need to carry two mortgages. For a fair, fixed fee, Knock offers a bridge loan of up to \$500,000 (based on home equity) to cover the down payment, market-ready improvements, or up to six months of interest-free mortgage and utility payments. The loan is repaid at closing, with no out-of-pocket costs, freeing up cash for moving and other expenses.

#### **Agent Benefits**

- Close valuable clients
- Buy more home by removing current mortgage from DTI calculation
- Win more offers with no home sale contingency
- Close faster
- Work with your preferred Lender
- · No fees to agents

#### **Client Benefits -**

- Win and close faster on their new home
- Up to \$500,000 bridge loan with a fair, fixed fee to Knock
- Pay one mortgage payment at a time
- Skip double moves, showings and living through repairs
- Maximize return on old home with funds to prepare it for sale



#### **HOME PREPARATION MADE EASY!**



**Boost Buyer Appeal** - Proactively address inspection issues and repair requests to attract confident buyers.



**Impressive ROI** - Homes improved with Curbio see an average 209% return on investment.



**Stress-Free Process** - No need to hire contractors or wait for bids. Curbio has skilled pros ready to start immediately.



**Quick Turnaround** - Projects typically finish in 4-6 weeks, so your home is listed sooner.

Odyssey partners with Curbio to help sellers maximize their home's value with no upfront costs or out-of-pocket expenses. Curbio handles everything from minor repairs to full renovations, with costs covered by home equity and repaid at closing. Sellers receive transparent quotes and can track progress through an online portal.

### FORMS CHECKLIST

Initiated by Buyers	Initiated by Sellers
Buyer Broker Agreement (BBA) Buyer Workbook Loan Preapproval or Proof of Funds Copy of Driver's License Foreign Buyers Addendum (FBA) Wire Fraud Notice Showing Agreement (if applicable) Home Inspection Disclosure Sales & Purchase Agreement (SPA) FHA/VA Rider (if applicable) Sale of Buyers Property Rider (if applicable) Insurance Rider Flood Insurance Notice Addenda (if applicable) Walkthrough Inspection Form Loan Commitment Title Commitment	Listing Agreement  Sellers Workbook  Copy of Driver's License  Comparative Market Analysis (CMA)  Residential Listing Data Entry Form  MLS Sheet (after listing is live)  Sellers Property Disclosure (SPD)  HOA/COA Disclosure (if applicable)  Notice to Association  HOA Docs (CC&Rs, ByLaws, Estoppel)  Property Survey (if available)  CDD Disclosure (if applicable)  LBP Disclosure (if applicable)  Flood Disclosure  Flood Insurance Notice (if applicable)  Lead-Based Paint Disclosure (LBP) (if applicable)  Addenda (if applicable)  Compensation Agreement  Required Condo Inspection Reports
<ul><li>Appraisal Report</li><li>Closing Disclosure (CD, HUD-1, ALTA)</li></ul>	<ul><li>Seller Net Sheet (optional)</li><li>Closing Disclosure (CD, HUD-1, ALTA)</li></ul>

# AGENT & CLIENT SAFETY



## ODYSSEY SAFETY RESOURCES & TOOLS

Safety is a priority and Odyssey invests in the safety of our associates, partners, and staff, including the use of simple technology applications, such as Real Safe Agent.

Real Safe Agent is a crime prevention system built specifically for the Real Estate Industry. Based in behavioral science, Real Safe Agent empowers the entire real estate community to cooperate and collaborate to keep each member safe. This cooperation and collaboration prevents the precursor behaviors of the predator from escalating to a crime and denies the predator and other types of criminals the environment they need to commit a crime.







Learn More at: www.realsafeagent.com



#### **SAFE SELLING:**

### A Practical Guide for Preventing Crime without Sacrificing the Sale

By Lee Goldstein and Dave Legaz

#### FREE eBOOK

Safety is the most important factor when dealing with the public. And utilizing the resources and tools made available to us, Odyssey has adopted specific safety protocols to reduce the risk and increase the safety of all our staff, associates, and clients. This section will complement what you learn from reading this book.

It is highly recommended you download the **FREE Forewarn smart phone application**, which allows agents to work safer and smarter by instantly verifying a prospect's identity and potential risks prior to a face-to-face engagement.

In seconds, with as little information as a phone number or name, agents can verify a prospect's identity, criminal records, bankruptcies, liens, judgments, address history, and property records all in one place, leading to safer and more productive interactions. FOREWARN customers can log in and access the service via the FOREWARN mobile app or from a web browser.



Price: \$20/month with an annual agreement for individual agents.

Learn More at: www.forewarn.com



### ODYSSEY'S SAFETY PRACTICES



At Odyssey Real Estate Services, the safety and security of our associates, employees, and clients are our highest priorities. Our Firm actively participates in the National Association of REALTORS® (NAR) Safety Program to ensure a secure working environment.

NAR has developed comprehensive safety tips and best practices with input from subject matter experts, law enforcement, and seasoned industry professionals. These guidelines help REALTORS® stay vigilant and protected.

#### SAFETY TIPS AND BEST PRACTICES:

- Initial Meetings: Always meet new clients in a neutral public location, such as a coffee shop or restaurant.
- Communication: Share your schedule with your broker, colleague, assistant, or family member.
- **Environmental Awareness:** Be aware of safety concerns, including poor cell phone reception or unfamiliar neighborhoods, and communicate any issues or concerns.
- Manage Privacy: Avoid oversharing personal information, especially on public-facing social media platforms or with customers you just met.
- Open Houses: Never host open houses alone.
- **Phone Preparation:** Ensure your cell phone is fully charged and has a strong signal before heading to an appointment. Use a tracking app and give it to family members or someone you trust who can track your location.
- **Property Showings | Tours:** Direct clients to walk ahead of you during tours instead of leading them. Avoid entering confined spaces such as attics, crawl spaces, or small bathrooms where you could be trapped. And leave the front door open during showings to provide a quick escape route, if necessary.
- Client Screening: Pre-screen clients using Forewarn before scheduling an in-person meeting.
- **Property Preparation:** Arrive 10-15 minutes early to unlock doors, turn on lights, inspect the property for safety concerns, and plan an exit strategy.
- Trust Your Instincts: If you feel unsafe, suspicious, or uncomfortable, call a friend, family member, or colleague to join you immediately via video. Create key words or texts, such as "NS" (not-safe) that do not alarm a client, but can prompt your trusted person to take action.
- **Police Support:** Request local law enforcement to conduct drive-bys during your open houses, particularly in questionable or high-crime areas.
- Maintain Distance: Keep clients within your line of sight and at least six to eight feet away at all times, when possible. Not only will this give them space to view the home, it will give you a broader view for safety precautions.
- **Self-Defense Training:** Take self-defense courses to prepare for potential threats and enhance personal safety.



## ODYSSEY SAFETY PRACTICES

At Odyssey, safety is a top priority. In addition to adhering to NAR's best practices, we have developed the following Odyssey-specific safety guidelines:



#### **OPEN HOUSES -**

Open houses must always be conducted by two individuals: a licensed agent and a second person such as an assistant, colleague, family member, or friend. Never host an open house alone. While you, the agent, guide potential buyers through the property, your assistant can welcome guests, oversee sign-in procedures, and offer refreshments.

Leverage the Odyssey Open House Kit to ensure a smooth and professional experience.

**Important:** If your assistant is not a licensed real estate agent, they cannot answer questions or provide information beyond what is on the property flyer. They should direct all inquiries to you as the agent.

#### **PROPERTY SHOWINGS & TOURS**

- **Transportation:** Always have buyers drive their own vehicles and meet you at the property. This avoids personal safety risks and liability issues in the event of an accident. Do not transport or ride with buyers for the same reasons.
- **Preparation:** Arrive early to assess the neighborhood and prepare the property for showing.
- Parking: Park on the street rather than in the driveway to ensure your vehicle isn't blocked. Leave space in front and behind your car to allow for a quick departure if needed.





#### MEETING CLIENTS IN PRIVATE =

Whenever possible, meet clients in public places or at the office during regular business hours when others are present. If you must meet outside normal hours or in private, bring a colleague, friend, or family member (over the age of 18). This provides an added layer of safety and helps avoid misunderstandings or false accusations.

#### CLIENT PROFILE AND IDENTIFICATION

- **Verify Identity:** Complete an Odyssey Client Profile Form for every client. Request a government-issued photo ID, make a copy, and attach it to the form.
- Immediate Submission: If a copier isn't available, use a scanner app or take a photo of the form and ID. Send it to your broker via text or email immediately.
- Client Refusal: If a client declines to complete the form or provide an ID, politely explain that you must contact your broker and will follow up the next day. This allows for a non-confrontational exit. Notify your broker for guidance on how to proceed.



### BUSINESS INCUBATOR



# FOUR LIFE FOUNDATIONAL PILLARS

#### Unlocking Your Full Potential: Four Pillars of Growth to Help You Write Your Story

At the heart of every thriving real estate professional lies a dedication to relentless growth—growth that transcends business and enriches every dimension of life. To help you script the next chapter of your journey, Odyssey Real Estate Services embraces a holistic approach, centered on four foundational pillars that shape a thriving, well-rounded life and career—what we call "a Revolutionary Life."

These pillars aren't just a path to professional excellence; they are a comprehensive blueprint for success, guiding you to become not only a top-tier professional but also a fulfilled, balanced individual. With this roadmap, you'll create a rewarding lifestyle that funds your life mission, empowers your story, and builds a lasting legacy.

#### 01 | PERSONAL DEVELOPMENT

- Faith & Family
- Friendships
- Health & Wellness
- Time Management
- Work-Life Balance
- Communication Skills

#### 02 | FINANCIAL DEVELOPMENT

- Financial Education
- Tax Planning
- Investment Strategies
- Money & Wealth Management
- Retirement & Estate Planning
- Leaving a Legacy

#### 03 | PROFESSIONAL DEVELOPMENT

- Continuing Education
- Legal & Ethical Practices
- Technology Training
- Customer Service
- Negotiation Skills
- Public Speaking & Presentation Skills
- Image & Etiquette

#### 04 | BUSINESS DEVELOPMENT

- Detailed Business Planning
- Lead Generation Strategies
- Marketing & Branding
- Sales Techniques
- Client Relationship Management
- Customer Acquisition & retention
- Networking & Partnerships
- Market Analysis

# WRITE YOUR STORY

#### Become the Go-To-Guru by Writing Your Own Story, First

In a world flooded with noise, where countless brands compete for attention, it's easy to feel overwhelmed by myriad mixed messages and relentless marketing. The real estate industry is no exception—brokerages and agents constantly battle to be the chosen guide for consumers navigating their property journeys. The big questions arise: "How do I stand out?" "How do I become the trusted leader in my market?" "How do I avoid the trap of being just another pushy salesperson?"

The answer lies not in being the loudest voice in the industry, but in shifting your focus by truly differentiating yourself. You must transition from being just another agent to becoming the essential guide in your client's personal narrative. Human nature gravitates toward self-preservation and the drive to thrive, and your role is to tap into that instinct by positioning your client as the hero of their own story and you are their guiding guru to help them move forward in their journey.

This is the essence of attraction marketing—a strategy that turns the traditional chase on its head. Instead of scrambling for leads or begging friends and family for referrals, learn to magnetize your business. Draw clients to you by offering value, clarity, and guidance, making them want to choose you over the rest.

Donald Miller's "*Building a Story Brand*" emphasizes the power of storytelling in cutting through the noise. He uses the example of how words are often just noise, but when music is added, it becomes a song that draws people into the story.

By crafting a clear, compelling brand message, you not only enhance your confidence but also invite your audience into a narrative where they see themselves as the central character—the hero. Your mission as a real estate professional is to guide them through their journey, offering solutions to their challenges, steering them away from pitfalls, and leading them toward success.

Today, you are the hero, and I am here to guide you on this path. And it starts by writing your story.

#### **EVERY GOOD STORY HAS 7 STRUCTURAL ELEMENTS:**

- 1 | A character (the hero or heroine)
- 2 | who has a problem, (the villain)
- 3 | meets a guide
- 4 | who gives them a plan
- 5 | and calls them to action
- 6 | that helps them avoid failure
- 7 | that ends in success.

## BE THE HERO OF YOUR STORY

#### You are the Character - the Hero in Your Story

We all work for a reason. Primarily it is for survival by creating a paycheck that supports our financial needs, goals, wants, and wishes. But, beyond mere survival, you have to dig deep and reflect on answering three (3) crucial over-arching questions:

- What do I want?
- · Who or what is preventing me from getting what I want?
- What will my life look like if I do or don't get what I want?



How does family play a re	ole in my drive for success?	
How do friendships play	a role in my drive for success?	
How does real estate play a role in my drive for success?		
How does health and we	llness play a role in my drive for success?	
What are my priorities?	(1 being your top priority, followed sequentially by priority)	
	T being your top priority, followed sequentially by priority/	
Examples:	1	
• Faith	2	
<ul><li>Family</li><li>Finances</li></ul>	3	
<ul><li>Friendships</li><li>Work</li></ul>	4	
Recreation	5	

creating your visi	ion
What do I want my life to look like in the next 6 months?	
Spiritually	
Personally	
Professionally	
Financially	
What do I want my life to look like in the next 12 months?	
Spiritually	
Personally	
Professionally	
Financially	

creating your legacy
What do I want my life to look like in the next 5 years?
Spiritually
Personally
Professionally
Financially
What is my exit strategy? (retirement, career change, eternal rest)
What footprint to I want to leave? What will be my legacy?

### UNMASKING THE VILLAIN

### **Unmasking the Villain in Your Story**



Every great story needs a villain—a force that challenges the hero, evokes disdain, and stands in the way of success. Whether it's a person or a source of pain, the villain is the obstacle that must be overcome. Superman has Kryptonite. Luke Skywalker has Darth Vader.

In our own life stories, we may encounter multiple villains, but trying to battle too many at once only leads to confusion and hinders our progress. The key is to identify the primary villain in your narrative—the real, tangible source of your pain. This villain isn't an abstract or imagined foe; it's something that genuinely holds you back.

While it's easy to blame others, we must ask ourselves who or what truly is the archnemesis in our story. To achieve success, focus on the one that, once defeated, will set you free to thrive as the hero of your own journey.

identifying the problem

### 3 Levels of Conflict Caused by the Villain, include:

### External

Barriers created that threaten our safety and stability.

### Internal

What relatable, emotional insecurity or frustration is caused by the external conflict?

### Philosophical -

Why is it necessary to defeat the villain? What deeper meaning or purpose will result from its demise?

**Example:** In the 2017 film *Wonder Woman*, Diana, an Amazonian warrior princess, lives in a secluded, all-female paradise, untouched by the turmoil of the outside world. However, her peaceful existence is shattered when she learns of a cataclysmic war raging beyond her homeland—the rise of Nazi Germany during WWII. Confronted with this existential threat to all humanity, Diana is torn between the safety of her utopian home and the burning desire to defend the innocent from a force bent on global domination. This inner conflict propels her into an unfamiliar and dangerous world.

Led by her guide, and future love interest, Major Steve Trevor, Diana embarks on a journey that reveals not just the full extent of her powers, but her true purpose. In the crucible of a world at war, she emerges as a symbol of courage, integrity, and humanity—embracing her destiny as the legendary Wonder Woman.

### IDENTIFYING YOUR ARCHNEMESIS

### Superheroes in the Real World

Though Wonder Woman may be a creation of fiction, the concept of being a real-life hero is far from fantasy. In the real world, heroism isn't always wrapped in thrilling adventures or battles against supervillains, but it's no less profound. Every day, we confront challenges that threaten our peace, joy, safety, and financial stability. Sometimes, the most heroic act is simply summoning the motivation to tackle these obstacles head-on.

Now, based on the priorities you've set, let's identify the villain in your story.

What is the chief	source of pain preventing you from achieving success?
What obstacles s	tand in your way or barriers must you overcome to find success?
Personify your vi	llain by breaking down the conflicts:
Personify your vi	llain by breaking down the conflicts:
	llain by breaking down the conflicts:
	llain by breaking down the conflicts:
	llain by breaking down the conflicts:
External	llain by breaking down the conflicts:
External	llain by breaking down the conflicts:
External	llain by breaking down the conflicts:
External Internal	llain by breaking down the conflicts:

### EQUIPPING YOUR ARSENAL

### **Identifying and Equipping Your Arsenal**

Every hero has a signature arsenal to defeat their foes. Wonder Woman wields her lasso of truth, bulletproof bracelets, and boomerang tiara, while Superman relies on his super strength, laser vision, flight, and freezing breath. In our world, we may not have superpowers, but we're equipped with our own powerful tools. Our weapons include prayer, knowledge, health, expertise, the tools of our trade, ethics, personality, talents, skills, connections, and a host of resources to help us conquer the challenges that stand in the way of our success.

Let's uncover your arsenal and identify the tools in your toolbox.

Create a list of inherent gifts and talents you possess.  Example: creative thinking, problem-solving, public speaking, great listening skills		
My gifts and talents:		
What life experiences have shaped you and what lessons have you learned?  Example: divorce, winning the gold medal at the Olympics, losing my favorite job, climbing Mount Everest		
My experiences:		
What tools of the trade best serve you in accomplishing daily tasks and goals?		
Daily Planner Other:		
Devotional   Bible Other:		
Technology Apps Other:		
Journal Other:		
What formal education, designations, or certifications have you received?		
My education:		



What do you consider your greatest strengths?  Example: empathy, determination, charisma, charm, persistence, courage, sense of humor
My strengths:
What do you consider your greatest weaknesses and areas in need of improvement?  Example: lack of empathy, boredom, lack of patience, lack of courage, health restrictions, lack of experience
My Kryptonite:
What mentors, coaches, or experts do you turn to for advice or guidance?  Example: pastor, team leader, family member, colleagues, professional network members
My support:
What are your core values?  Example: honesty, transparency, ambition, loyalty, respect, professionalism, authenticity, compassion, spontaneous
My values:
How will you combine these tools to achieve your goals?  Example: I will create a daily routine that integrates my wellness program, use my network for career advice, and apply my expertise in communication in my job.
My plan:

### THE POWER OF A BUSINESS PLAN

### Your Blueprint for Success: The Power of a Real Estate Business Plan

A business plan is not just a formality—it's the cornerstone of success, especially for real estate agents. Think of it as your strategic blueprint, designed to guide you through the complexities of the market and keep you on the path to success. This document isn't just about setting goals; it's about defining your vision, honing your message, and crafting the steps that will turn your ambitions into reality. It's your roadmap, ensuring you stay focused, accountable, and on track to achieve the outcomes you've set your sights on.



But there's more to it than just strategy. Your business plan is the foundation of your brand and image. The first step? Identify a specific financial goal that will serve as the cornerstone of your entire plan. This goal isn't just about money—it's about what that money represents: time freedom, a balanced lifestyle, and the ability to pursue your true passions. With a solid financial goal in place, you can build a business that not only thrives but also supports the lifestyle you desire.

Remember, money is a tool—a seed that, when planted wisely, grows into a financial harvest. This wealth can then be used to advance the causes you believe in, uplift others, create lasting memories, and, in our profession, help many achieve the American dream of homeownership. While money itself isn't the ultimate goal, it's the key that unlocks the freedom and security we all strive for. Keep it in perspective, and let your business plan be the blueprint that guides you to success on your terms.

### DON'T MAKE MONEY YOUR MASTER. MAKE IT YOUR SERVANT.



"Money is only a tool. It will take you wherever you wish, but it will not replace you as the driver."

Ayn Rand

### DRAFTING YOUR ROADMAP FOR SUCCESS

### Drafting Your Roadmap for Success Starts with the End (Destination) in Mind

You've laid the groundwork by understanding why you're in real estate, pinpointing the challenges that stand in your way, and finding the courage to overcome fear and failure. Now, it's time to draft your roadmap for success. This isn't just any map; it's a dynamic, strategic business plan that charts your journey with clear goals, actionable steps, and the discipline needed to stay on course.

Think of this roadmap as your guide and your accountability partner, ensuring you remain focused and on track as you navigate the twists and turns of your real estate journey. But like any journey, it starts with a destination in mind. By identifying a specific financial goal, you set your endpoint—and from there, you can chart the best course to reach it. Let's define that destination, and together, we'll map out the path to get you there.

### 1 | SELECTING YOUR DESTINATION - YOUR ULTIMATE FINANCIAL GOAL

A   How much annual income do you want to take home (net)?		\$
B   Team Split	% \$	
C   Taxes (avg est. 25%)*	% \$	*Consult with a tax professional for an accurate estimate.
D   Expenses (avg est. 30%)	% \$	
Add A-D to get your target annual gross income goal (GCI).		E \$



### IDENTIFYING YOUR STARTING POINT

### Your Starting Point: Assessing Where You Stand

Before you can embark on any journey, it's crucial to know exactly where you stand—your starting point. With your destination in mind, it's time to take a clear-eyed look at where you are today. To chart the best course forward, we need to review your current and prior year's productivity. If you're a brand-new agent with no past productivity, that's perfectly fine—your starting point is zero. Understanding where you are now sets the stage for the journey ahead, allowing you to plot the most effective route to reach your goals.

### 2 | IDENTIFYING YOUR POINT OF ORIGIN

How many transact	ions did you close in the	past 12 months?	
Buyer's Sid	de Seller'	's Side	
What was the total s	What was the total sales volume of all transactions?		\$
What was your total	l Gross Commission Inco	me (GCI)?	\$
\$	Previous Year GCI  This Year's Goal GCI	# of Previous Year Transactions  Last Yrs Avg Commissions	Avg Commissions per Sale  F   \$  # of Closings Needed this Year
	\$	F \$ =	G
THIS		(Line A), I will clos	
YEAR'S		ansactions with an average co	
GUAL:	\$	per trans	saction.



### ALL ABOUT BRANDING

Effective brands are built with intentional elements that create a cohesive, memorable, and trustworthy image. This process requires careful planning, consistency, and a deep understanding of the audience and market you are targeting. Successful brands don't survive or thrive on this alone, however.

Branding is a by-product of:

- · Consistently Give Value
- · Connecting with Your Audience on an Emotional Level
- Fostering Long-Term Loyalty
- And Ultimately Meeting and Exceeding Customer Expectations

Here are the key elements that contribute to building an impactful brand:

### Clear Identity -

Define what the brand stands for by creating clear mission, vision, and values.

### Define Audience

Define your target audience and tailor your messaging according to their needs, wants, desires, and pain points.

### Voice & View

The brand's tone and message should be clear, complemented by a strong visual identity.

### Consistency |

Consistent messaging should create a unified experience across all customer touchpoints.

### Differentiation

Define how your brand is different than your competitors and why customers should pick you.

### Connectivity -

Effective branding evokes emotion and incites a response, starting with community.

Everyone is in sales. From interviewing for a job to attracting the right mate to talking yourself out of a traffic ticket, everyone sells themselves consistently. But the key to success is to not be "salesy." Salesy people come across as desperate, needy, greedy, creepy, and untrustworthy.

### STEP-BY-STEP GUIDE TO BUILDING YOUR BRAND

Building a brand as the Go-To-Guru or Industry Leader in your target market requires focusing on creating authentic, relatable, and value-driven messaging that attracts clients and builds lasting relationships for repeat and referral business. Here are steps to building that brand:

- 1 Establish Your Foundation: Mission | Vision | Values
- 2 Craft Your Unique Value Proposition (UVP)
- 3 Create High-Value Content
- 4 Establish a Strong Market Presence
- 5 Leverage Professional Visual Branding
- 6 Establish Yourself as the Authority
- 7 Network and Collaborate with Other Professionals
- 8 Use Lead Magnets to Capture Interest
- 9 Build Long-Term Relationships | Testimonials
- 10 Analyze and Adjust Your Approach

### ESTABLISHING YOUR BRAND FOUNDATION

### **Understanding Mission, Vision, and Values:**

Every individual and business should have three foundational statements: a mission statement, visions statement, and core values that serve as the founding principles of the individual or organization.

MISSION:

What is the present purpose of the organization? What does it do, whom does it serve, and how does it serve them? A Mission Statement outlines primary objectives and approaches for achievement. It should serve as a daily guide for decision-making, ensuring the organization is aligned with its core values and goals.

VISION:

Where does the organization want to go? What are the future aspirations of the organization? The Vision Statement paints a picture of what the company aims to achieve long-term, including forward-thinking, inspirational, and aspirational goals. It serves as a motivational tool.

VALUES:

The fundamental beliefs and guiding principles that shape an organization's culture, behavior, and decisions. Core Values reflect what the organization stands for and what is considered most important in achieving its mission and vission.



To empower homebuyers and sellers by providing innovative real estate solutions, exceptional customer service, and expert guidance, helping them achieve their real estate goals with confidence and ease.

### **Vision Statement** -

To be the leading real estate agency that transforms the home buying and selling experience, setting new standards for excellence and innovation, and making homeownership accessible to everyone, everywhere.

### **Core Values**

Integrity · Excellence · Customer Focus · Innovation · Collaboration · Community · Respect



### 3 | CREATE YOUR STATEMENTS

MISSION STATEMENT	
VISION STATEMENT	
VISIONSTATEMENT	
VALUES	

### **CRAFTING YOUR** VALUE PROPOSITION

A Unique Value Proposition (UVP), also known as an "elevator speech," is a clear, succinct statement that conveys the benefits of your services as a real estate professional. It should clearly outline how you address your customers' needs, differentiate yourself from competitors, and why customers should choose you.

Your UVP should be written in straightforward language that resonates with customers, avoiding confusing jargon or overused slogans. It typically includes a headline, a brief introductory paragraph or sub-headline, 3-4 key benefits in bullet points, and may also feature an image to visually support your message.

- Identify Your Strengths What sets you apart in real estate (ie. local expertise, negotiation skills, specific property types, client service, years in the business, etc.)
- ▶ Determine Your Target Audience Clarify the type of clients you want to attract (first-time homebuyers, luxury or affluent clients, investors, families, seniors, veterans, etc.)
- **Develop Your Brand Identity** Choose your brand's tone and visual style that matches your values and audience. Are you approachable and friendly, sophisticated and polished, or detail-oriented and strategic?

		el.	ercise	2
What service are you selling?				
Who is your target client?				
How does it benefit your client?				
What makes your service different o	r unique?			
ejamples				

TRELLO BRINGS ALL YOUR TASKS, TEAMMATES, AND TOOLS TOGETHER. Keep everything in the same place - even if your team isn't.

□ Trello

MEET FACE-TO-FACE FROM ANY DEVICE.

Connect, collaborate, and get more done together with Zoom's reliable video meeting solution.

### ODYSSEY VALUE PROPOSITION

### **Odyssey Real Estate Services: Chart Your Course with Us**

At Odyssey Real Estate Services, we empower our clients to chart there course to real estate success. Our team delivers personalized, innovative, and cutting-edge services with a commitment to excellence and expertise. Whether you are buying, selling, or investing, we are your trusted partners in creating an unparalleled and rewarding experience, helping you write the next chapter of your story.

### **Key Benefits:**

### **EXPERT GUIDANCE**

Our seasoned professionals offer in-depth market knowledge and strategic insights, empowering you to make informed decisions.

### **COMPREHENSIVE SUPPORT**

From property evaluation to negotiation, we handle every aspect of the transaction, making the process smooth and stressless.

### **PERSONALIZED SERVICE**

We understand that every client's needs are unique, and we customize our approach to meet your specific goals.

### **EXCLUSIVE PARTNERSHIPS**

Benefit from our exclusive relationships with vendors, top buyers, and cash investors, providing unparalleled opportunities and solutions.

Odyssey Real Estate Services is committed to delivering exceptional service that transforms your real estate aspirations into reality. Choose us for a partnership that prioritizes your success and satisfaction.

CREATE YOUR UNIQUE VALUE PROPOSITION  CREATE YOUR UNIQUE VALUE PROPOSITION
Introduction - Provide a brief, specific explanation of your services, detailing what you offer, who your target audience is, and why your services are valuable.
Key Benefit(s) - Include 3-4 concise bullet points that outline the main advantages of your services.
•
Headline - Capture attention with a short, powerful statement that highlights the ultimate benefit you offer.
[Your Business Name] offers [what you offer] to [your target audience] who [need/problem you solve]. Unlike our competitors, we [differentiator/unique benefit].
offersto who Unlike our competitors, we

### TIME MANAGEMENT

### PARTNER ACTION PLANNER AND SUCCESS MANAGER



### PRODUCTIVITY HACKS FOR REAL ESTATE PROFESSONALS

PRODUCTIVITY: the measure of performance that compares the output of results to the amount of work performed to produce those results.

### **USE A PLANNER** -

A planner and success tracker will help you stay focused and monitor productivity, while keeping your calendar organized and your time budgeted to ensure a positive work-life balance.

### CREATE A MOTIVATING WORKSPACE

Setup an ergonomic, quiet, positive workspace that will motivate you to be productive and less distracted.

Decorate with motivational posters, plants, and lighting that creates a welcoming space.

### **KEEP A NOTEPAD BY YOUR BED**

Some of the greatest ideas happen at the most inopportune times, sometimes while you are in the shower or at 3:00 AM. Keep a notepad or sticky notes by your bed or in your car for those randomly brilliant moments. Rely on Suri or Alexa to take notes, too!

### DECLUTTER & ORGANIZE -

It can become distracting and difficult to work in a cluttered, disorganized, or dirty workspace. Take time to organize, clean, and remove unnecessary junk from your workspace to enhance your mood and focus.

### IT'S OKAY TO SAY "NO" -

Collaboration is a positive thing. However, demands on your time can dramatically decrease your productivity, decrease your energy, and increase stress. Be okay with saying "no" when a request interferes with your priorities or productivity.

### TAKE BREAKS

Studies show that most people struggle with staying focused or concentrating for more than 20-25 minutes at a time. After this time, take a 5-minute break to refresh your mind, get the blood flowing back to your body, and increase oxygen levels. You will actually find you get more done!

### **SET HEALTY DEADLINES**

Deadlines give us timeframes and help us stay focused and on-track, even when we often lose motivation or are distracted by other demands.

### SIMPLE THINGS MATTER -

In our tech-focused world, sometimes we just need to use the traditional pen and paper to take notes, write down ideas, or brainstorm. Collect your notes and input them into an organized system later for safekeeping and preservation.

# ACCOUNTING & TAXATION

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Before making any financial or tax-related decisions, we strongly recommend that you consult with an appropriately licensed and qualified professional who can assess your specific situation and provide tailored advice.

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### REAL ESTATE AGENT TAXABLE INCOME

In Florida, real estate agents, like all individuals, are subject to federal income taxes based on their total taxable income, as Florida does not have a state income tax. Therefore, a real estate agent's tax bracket depends primarily on their federal income tax rate, which is determined by their filing status and taxable income.

### Federal Income Tax Brackets for 2025 (for single and married filers):

Here are the 2025 federal tax brackets for single and married filing jointly taxpayers. Real estate agents are typically self-employed, so their tax rates can be affected by both ordinary income taxes and self-employment taxes.

### **Single Filers**

Taxable Income	Tax Rate
\$0 - \$11,925	10%
\$11,926 - \$48,475	12%
\$48,476 - \$103,350	22%
\$103,351 - \$197,300	24%
\$197,301 - \$250,525	32%

### **Married Filing Jointly**

Taxable Income	Tax Rate
\$0 - \$23,850	10%
\$23,851 - \$96,950	12%
\$96,951 - \$206,700	22%
\$206,701 - \$394,600	24%
\$394,601 - \$501,050	32%

### **Self-Employment Taxes**

In addition to federal income tax, real estate agents who are self-employed must pay self-employment (SE) tax on their net income, which covers Social Security and Medicare taxes. The SE tax rate is 15.3% on the first \$168,600 of income in 2024:

- 12.4% for Social Security
- 2.9% for Medicare

If your net income exceeds \$200,000 (\$250,000 for married couples filing jointly), you may also be subject to an additional 0.9% Medicare tax.

**Note:** Always Consult a Tax Professional. Income tax rates can vary based on your location and specific circumstances, so it's important to consult with a tax professional or accountant to ensure you're accounting for all income and following the latest IRS guidelines.

### COMMON REAL ESTATE AGENT TAX DEDUCTIONS

### **Business Expenses**

- Office Supplies
- Software & Subscriptions
- Technology Tools (Laptop)
- Cell Phone & Internet Service
- Postage & Shipping

### **Marketing & Advertising**

- Website Costs
- Business Cards, Flyers, Signs, etc.
- Online Advertising
- Printing Costs

### **Home Office**

- Mortgage/Rent
- Utilities
- Property Taxes
- Furniture & Fixtures

Simplified Option: You can deduct \$5 per square foot for the business portion of your home, up to 300 square feet.

### Client-Related

- Client Gifts (limited)
- Client Entertainment (limited)

### Miscellaneous

- Depreciation on Business Assets & Personal Real Estate
- Bank Fees | Loan Interest
- IRA & 401k Contributions
- Payment to Assistants (PAs / VAs)

### **Vehicle Expenses**

- Mileage & Gas
- Vehicle Maintenance

### **Education & Training**

- Real Estate School Tuition
- Continuing Education
- Training & Coaching Programs
- Books & Publications

### Fees & Dues

- Association Dues & MLS Fees
- Legal & Accounting Fees
- Referral Fees | Splits Pd to Other Agents
- License Renewal Fees
- Broker / Transaction Fees

### Insurances

- Business Insurance
- Health Insurance Premiums
- Portion of Auto Insurance

### Record-Keeping Tips

- Track All Expenses: Keep receipts, invoices, and documentation for all expenses you plan to deduct.
- Use Accounting Software or App to track your income and expenses.
- Log Mileage: Use a mileage-tracking app to record vour business miles.

**Note:** Always Consult a Tax Professional. Deductions can vary based on your location and specific circumstances, so it's important to consult with a tax professional or accountant to ensure you're maximizing your deductions and following the latest IRS guidelines.

### BUSINESS SET UP & TAX ADVANTAGES

Forming a legal business entity, such as a Limited Liability Company (LLC) or a Professional Association (PA), can offer real estate agents significant tax advantages and other benefits compared to operating as self-employed individuals, including:

### **Pass-Through Taxation**

LLCs and PAs typically benefit from pass-through taxation, meaning the business's income is reported on the owner's personal tax return, avoiding double taxation. This structure allows agents to deduct business expenses directly against their income, potentially reducing taxable income.

### **Self-Employment Tax Savings**

By electing S Corporation status for their LLC or PA, agents can pay themselves a reasonable salary and take additional profits as distributions. Only the salary is subject to self-employment taxes, potentially reducing the overall tax burden.

### Qualified Business Income (QBI) Deduction

Under the Tax Cuts and Jobs Act, eligible pass-through entities can deduct up to 20% of their qualified business income, further reducing taxable income.

### advantages

### **Liability Protection**

Operating as an LLC or PA in Florida separates personal and business assets, protecting personal assets from business liabilities. This means that if legal issues arise, such as claims against your property, your personal assets could be at risk.

### **Professional Credibility**

Forming a legal entity can enhance an agent's professional image, potentially attracting more clients and business opportunities.

### **Tax-Friendly Environment**

Florida does not impose a state income tax on individuals, which can be advantageous for business owners. However, corporations doing business in Florida are subject to a 5.5% income tax.

### **Operational Flexibility**

LLCs offer flexibility in management and profit distribution, allowing agents to tailor the business structure to their specific needs.

**Note:** Consulting with a tax professional or attorney familiar with Florida's real estate laws is advisable to determine the most beneficial structure for your specific situation.

# LEGAL & REGULATORY COMPLIANCE

STARTING A BUSINESS IN FLORIDA



### STEPS TO STARTING A BUSINESS IN FLORIDA

Starting a business in Florida is fairly simple, but comes with several regulatory compliance factors, associated costs, and ongoing responsibility as a business owner. Here are the steps to forming a company or legal entity in the state of Florida:

### 1 | Determine if Forming an Entity is the Right Step for You

While there are certain tax advantages for agents to become a legal entity, it is important to determine the timing and costs associated with registering a company with the State of Florida. Most often it is not advantageous for an agent for form a legal company until they consistently earn a certain level of income. It is advisable that you speak with a tax or legal professional to determine if and when to create a company.

### 2 | Determine the Corporate Structure

If you determine that becoming a legal company is the right move for you, you must decide on a corporate structure: Corporation, Limited Liability Company (LLC), Limited Liability Partnership (LLP), General Partnership, Professional Association (PA), or Sole Proprietorship. Most agents form either a PA or LLC because those two classifications fit individual professionals well and offer the best tax advantages for the profession.

### 3 | Brainstorm Research Potential Names

Create a list of names for your new entity. Research the ones you like most to ensure the name is not already registered in the State or somewhere else, keeping in mind that a company or person by that same name may already exist and operate. Plus, there may be a trademarked name, prohibiting its use.

Secondly, you want to make sure you don't have a name that could be wrongly affiliated with another company with a similar name. If a name you like is inactive or no longer in business (after about 5+ years) then you may consider it as an option.

For PAs, most agents simply register in their name, such as "John Doe, PA." For LLCs and PLLCs, agents typically register a company name or team name, sometimes including the agent's individual name such as "Smith & Rogers Team" or "Jane Smith Homes." However, you have to be careful as an agent not to include certain prohibited words in your entity's name, including the title "REALTOR."

The Florida Real Estate Commission (FREC) has outlined prohibited terms to prevent any implication that a team or group operates as an independent brokerage. According to Florida Administrative Code Rule 61J2-10.026, real estate team or group names shall not include the following words:

- Agency
- Associates
- Brokerage
- Brokers
- Company
- Corporation
- Corp.
- Inc.
- LLC
- LP, LLP, or Partnership
- Properties
- Property
- Real Estate
- Realty
- Or similar words suggesting so

These restrictions are in place to prevent any misleading representations regarding the nature of the business entity. It's essential for real estate professionals to select names that comply with these guidelines to avoid regulatory issues.



### 4 | Register Your Business through Sunbiz

After you have identified a name, ensured there are no similar or other known names using the same name, you will need to form your business by completing an Articles of Organization, which can be done online at https://dos.fl.gov/sunbiz/start-business/. The associated costs are on their website.

It typically takes a few days to process and you can follow up by checking Sunbiz to see when your company is registered by doing a name search and download your approved Articles for your records.

### 5 | Apply for Your Employer Identification Number (EIN)

While you are waiting for your Articles of Organization to be processed through the State, you can apply online for your federal EIN number by going to: https://www.irs.gov/businesses/small-businesses-self-employed/how-to-apply-for-an-ein and applying FREE for your number. This takes a few short minutes and you'll have your EIN shortly thereafter. The EIN is to your business what your personal SSN is to you.

### 6 | Report Your Benefit Ownership Information

Beginning January 1, 2024, certain types of corporations, limited liability companies, and other similar entities created in or registered to do business in the United States must report information about their beneficial owners—the persons who ultimately own or control the company—to the Department of the Treasury's Financial Crimes Enforcement Network (FinCEN). Additional information about the reporting requirements, including answers to questions such as "is my company required to report beneficial ownership information to FinCEN," "who is a beneficial owner," and "when do I need to report my company's beneficial ownership information" is available on FinCEN's beneficial ownership information webpage, www.fincen.gov/boi.

### 7 | Open a Business Bank Account

After you have your Articles of Organization registered through Sunbiz and your EIN number, you can and should open a business account with your preferred banking institution to keep your personal and business income/expenses separate.

### 8 | Update Your Real Estate License with DBPR

If you are going to receive payment of commissions or doing business under the name of your new entity, you will need to submit a name change to DBPR by visiting **www.myfloridalicense.com**. And submit a copy of your new license (once received) to Odyssey.

### 9 | Local Municipalities and Business Licenses

In most cases you won't have to register to do business with the local municipalities, but you should check to ensure you do not have to acquire a business license or pay taxes on any revenue you generate in that municipality.

### BUSINESS ACCELERATOR



### THREE PILLARS OF SUCCESS IN

### REAL ESTATE

**Experience** and Skill Development

**Networking** and Relationship **Building** 

Marketing and **Branding** 



Real estate rewards those who are continuously learning and investing in advanced education or specialized training. Remember: Learn to Earn.

Skill development builds credibility with clients. With a proven track record, you will earn more referrals. repeat business, and larger paychecks.



Cultivating relationships and building your network will increase vour net worth. Highly successful agents are not "salesy," they're relationship builders.

**Engaging the** community by showing up to events, volunteering, and local outreach helps build trust and ensures top of mind.



Combined with the other two pillars, your personal brand is your unique fingerprint on the market

Clients navigate toward agents they recognize and trust. The key to building that trust and credibility is using valuable marketing tools and resources consistently, creatively, and creating a strong online presence.

### UNDERSTANDING MARKET TERMINOLOGY

MACRO   MEGA-MARKET	A large, overarching market, such as a major metropolitan area or entire city.
MESO-MARKET	A medium-scale market, often a suburb, town, or smaller district within a metro area.
MICRO-MARKET	A hyper-specific geographic or demographic target such as a neighborhood, subdivision.
NANO-MARKET   NICHE	An ultra-specific subset of the micro-market such as age-restricted community, luxury condo, exclusive golf resort.



## A JACK OF ALL TRADES IS A MASTER OF NONE, BUT OFTENTIMES BETTER THAN A MASTER OF ONE.

William Shakespeare

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Most real estate agents rely on a "shotgun" approach, spreading their efforts across a broad market in hopes of capturing leads and closing deals. However, this often leads to wasted time, mismanaged resources, and limited success. No agent can effectively dominate a large market without first mastering a smaller, more focused target.

At Odyssey, we champion the "sniper" approach. With pinpoint precision, we guide you in building your brand and business within a micro or niche (nano) market. By targeting a specific geographic area or demographic population, you'll gain the expertise and credibility needed to position yourself as the go-to authority in your chosen market.

Once you've established yourself as the leader in your micro-market, you can strategically expand your reach. This mirrors how successful global businesses grow—by first dominating a single market with a high-demand product or service, then scaling outward. Attempting to tackle a massive mega/macro-market from the start often leads to burnout, frustration, and lackluster results.

Hone your "sniper" skills, master your micro-market, and build the foundation for long-term, scalable success.

### BUILDING A WINNING STRATEGY IN REAL ESTATE

Utilizing a well-known marketing strategy not often used in real estate, known as the STP (or STeP) formula is key to precisely identifying your target customer within your micro-market.

### **SEGMENTING**



### **TARGETING**



### **POSITIONING**

Identify key traits of your target clientele, including location, lifestyle, and behavior.

Focus on high growth, high-profit customer groups that align with your strengths.

Stand out by offering a unique value proposition (UVP) that solves client pain points and builds trust.

### SEGMENTING YOUR TARGET AUDIENCE

Segmenting involves identifying specific customer groups to target with tailored marketing strategies. These segments include:

- Geographic: Focus on location-based factors like region, city, or subdivision to address local preferences effectively.
- **Demographic:** Consider characteristics like age, gender, education, or income to craft messages that resonate, while ensuring compliance with Fair Housing Laws.
- **Behavioral:** Analyze buying habits, frequency, and interests to understand and meet your audience's specific needs.
- **Psychographic:** Dive into lifestyle, hobbies, values, and beliefs to connect with your audience on a deeper, more emotional level, enhancing the relevance of your messaging.

### ODYSSEY CHAMPIONS THE SNIPER APPROACH





### TARGETING: SELECTING YOUR MOST IDEAL CLIENT

Targeting involves identifying which segment is most likely to convert into customers. The ideal customer is part of a growing population, offers high profitability, and has a low cost of acquisition. Here's how to evaluate your target audience:

- **Size:** Assess the size of your segment and its growth potential. For example, targeting seniors aged 55+ offers opportunities due to its large and continually expanding population.
- **Profitability:** Identify which segment will generate the highest revenue. Consider their lifetime value—are they one-time customers, or do they offer potential for repeat business or referrals?
- Reachability: Evaluate how effectively and affordably you can reach this audience.
  Determine the best communication channels based on your target's preferences. For
  instance, younger audiences are best reached through digital and social media, whereas
  older audiences typically prefer more traditional methods like direct mail, local print ads, or
  community newsletters.

### POSITIONING: STANDING OUT IN A COMPETITIVE MARKET

Positioning defines how you differentiate your services and unique value from competitors. It's about identifying what makes you memorable and desirable in the marketplace. Three key positioning factors can give you a competitive edge:

- Experiential: Focus on the emotional connection your customers make with your brand or service. What's your story, and how will it resonate with them? The experience you provide should leave a lasting impression that fosters loyalty and trust.
- Functional: Solve problems, address pain points, or create solutions your audience may not
  even realize they need. For example, Post-It Notes became indispensable by addressing
  everyday frustrations in a simple and effective way. What tangible benefits or solutions do
  you offer?
- **Symbolic:** Appeal to your customers' self-image, sense of belonging, or aspirations. For example, Planet Fitness positions itself as the "Judgment Free Zone," attracting those who value inclusivity and comfort in a low-cost gym environment. How can your services reflect and elevate your clients' values or identity?

By leveraging these factors, you can establish a unique position in the market that draws clients to you and sets you apart from the competition.

### MASTERING YOUR MICRO-MARKET

With over 185+ tasks to each real estate transaction, it is difficult to master your market while being a Jack of All Trades - generating leads, creating stellar client experiences, completing massive amounts of paperwork, monitoring timeframes and deadlines, and the myriad other tasks involved in real estate transactions. Odyssey helps ease this burden by providing our associate and partners with full-service brokerage and support so you can concentrate specifically on mastering your market. Here are steps to help you conquer and dominate your market:



### 1 | IDENTIFY YOUR MICRO-MARKET USING THE STP FORMULA

Pinpoint a specific, thriving local area. Look for communities that are well-populated, experiencing growth, and active in real estate. Avoid stagnant markets with low development or minimal activity. This chosen "town" or community will become your micro-market—a manageable area you can dominate.



### 2 | STUDY YOUR MARKET

Become the ultimate researcher. Dive into your community's history, culture, and key characteristics, including local events, schools, businesses, architectural styles, demographic trends, crime rates, and recreational hotspots. Visit these places, talk to residents and local leaders, and observe the nuances of the area. Identify competitors and find ways to differentiate yourself with unique value and services.



### 3 | INVEST TIME, TALENT, & TREASURE IN YOUR MARKET

Integrate yourself into the community until you become a recognizable fixture. Volunteer at local events, sponsor initiatives, and support small businesses. Join organizations like the Chamber of Commerce, participate in school activities, and back local sports teams. Build connections, serve on boards, and establish yourself as a trusted, approachable community leader.

### GIVE GENEROUSLY WITHOUT EXPECTATION RECEIVE GENEROUSLY BY DEFAULT

### ADVANCED REAL ESTATE STRATEGIES

LEVEL-UP YOUR BUSINESS



### PARTNER SPECIALIZATION

### The Importance of Transitioning from a Generalist to a Specialist

The real estate industry is highly competitive, with many agents typically serving sellers and buyers in the residential market. Relying on outdated marketing strategies and traditional practices often leads to frustration, a sense of failure, and feelings of inadequacy. Many agents eventually leave the industry, realizing they could earn more money working in a different field.

To build a lucrative career in real estate, it's essential not only to differentiate yourself from the competition but also to understand the fundamental principles of capitalism. By identifying gaps in the market and areas where needs are unmet, you can position yourself as a specialist and an expert in your field.

Consider the medical and legal professions: both include generalists and specialists. A primary care physician, for example, is a generalist who can diagnose and treat common ailments. However, when advanced knowledge is required, you would seek out a specialist in a particular area of medicine. The legal profession operates similarly; a criminal lawyer specializes in criminal cases but is unlikely to be an expert in fields like corporate law, estate planning, or real estate.

In real estate, specialization can distinguish you from your peers, deepen your knowledge, and enhance your expertise. This leads to higher compensation, more clients, and greater professional opportunities.

Here are a few areas of specialization to consider:

### **AFFLUENT & LUXURY**

Specializes in high-end properties in affluent areas, including mansions, estates, and exclusive penthouses.

### **INVESTMENTS**

Focus on properties purchased for the purpose of generating income through rentals or resales.

### **INDUSTRIAL**

Properties used for manufacturing, production, distribution, or storage such as factories, warehouses, distribution.

### COMMERCIAL

Properties used for business purposes, such as office building, retail spaces, and warehouses.

### **VACATION | SHORT-TERM RENTALS**

Specializes in vacation and second homes that may be rented out on a short-term basis (i.e. AirBNB)

### LAND

Helping buyers and sellers purchase undeveloped land for future agricultural or planned development.



If you want to be a world-traveler or help foreign buyers, this specialization will set you apart.

### **SENIOR LIVING**

Help the aging population buy, sell, and relocate to communities that meet their specific needs.

### **AFFORDABLE HOUSING**

Focus on helping low-to-moderate income individuals and families live the American dream of homeownership.

### **DIVORCE**

Being the real estate partner in divorce situations can be lucrative as you help a couple part ways and buy new homes.

### **ESTATES & UNWANTED HOMES**

Families in the midst of grief need a true professional to help them navigate disposing of unwanted properties.

### **MILITARY RELOCATION**

Find housing solutions for military families being relocated due to deployment or base/post changes.

### **GREEN & SUSTAINABLE**

Specializes in environmentally friendly and sustainable properties for those who are eco-conscious.

### **NEW CONSTRUCTION**

Become a new construction guru and help buyers find their new dream home or build a custom home on undeveloped land.

### **RELOCATION**

Corporate and individual relocations are common as people transition to other areas.

Become their go-to guru!

### **FORECLOSURES & SHORT SALES**

Help those struggling with their current financial situation by helping them sell their home and protect their credit.

### **VETERAN HOMES**

Veterans are an underserved population in the industry, struggling to find homes that meet their unique needs.

### **SMART HOMES**

Are you tech-savvy and want to help those looking for high-tech homes with all the features? Become their guide.

Each sector of the real estate profession offers unique advantages and challenges. While some niches may be more lucrative than others, all require patience, expertise, and advanced training to effectively serve clients. To establish yourself as a credible and knowledgeable professional in your chosen field, consider pursuing certification or designation courses through your local Realtor associations and the National Association of Realtors (NAR). These credentials not only enhance your knowledge but also add credibility to your expertise. By focusing intensely on your chosen sector, you can position yourself as the go-to expert in your market.

### FINDING YOUR NICHE WORKSHEET

### Pursue Your Passion While Finding Your Purpose in Real Estate

At Odyssey Real Estate Services, we are committed to helping you pursue your passion and discover your purpose in real estate. Our framework is designed to empower you to build a lucrative career that supports the lifestyle you desire while providing expert guidance to clients with specific needs.

Our team model emphasizes collaboration and partnership. When a client's needs align with a specialized area, we encourage referring them to a team member with the relevant expertise. This approach allows our agents to focus on their strengths without needing to master every niche, similar to how a general practitioner refers patients to a specialist. We offer a 30% referral fee\* to the referrer, ensuring that clients receive the highest level of service without placing the burden of specialized knowledge on every agent.

No agent can successfully be all things to all people. By working together through referral-based incentives, we foster a supportive, collaborative, and trusting community within our team while ensuring that clients' needs are met with care and excellence.

*Paid for by the specialist receiving the referral at closing. The referral fee is deducted from t team split.
esercise
1   SELF-ASSESSMENT
What client needs resonate with you the most (i.e. helping the elderly transition to senior living, assisting couples going through divorce, aiding tech gurus find smart homes)?
What unique experiences or knowledge do you bring to the table that might help you service your niche market or ideal client?
What areas or knowledge do you need to become an expert in this niche?



### 2 | MARKET RESEARCH

What niches are currently underserved in your local market?
Which areas of real estate have the highest demand in your area? Where are there gaps that need to be filled?
What is the demographic or economic condition of your target population?
Who are your main competitors in your market and what niches do they specialize in?
How can you differentiate yourself from the competition?
3   SPECIALIZATION OPTIONS
Based on your self-assessment and market research, list 3-5 potential niches that interest you.
1.
2. 3.
4.
5.



### Things to consider for each niche...

- Market Demand: Is there a high demand for this specialization in your area?
- Profitability: Does the niche offer high earning potential?
- Passion Alignment: Does the niche align with your passions and interests?
- Expertise Needed: What level of expertise or training is needed?
- Competition: How saturated is the market with other specialists in your area?

### 4 | ACTION PLAN

Based on your evaluation, which niche do you choose to specialize in?	
Why did you should this pinks?	
Why did you choose this niche?	
What certification or training do you need to become an expert in this niche?	
Trinat continuation of training ac you need to become an export in time meno.	
What steps will you take to market yourself as the specialist in this niche?	
	_
	_
How will you begin building your client base in this niche?	
	_
How will you begin building your client base in this niche?	