



new agent
guidebook



**BREAKTHROUGH
BROKER**

Welcome to Your New Career!

The real estate industry offers a path to achieving financial goals, but success requires dedication. The first year is critical, especially the first few months after passing your licensing exam. Consider yourself an entrepreneur now, launching your real estate career. This guidebook will be your roadmap to success, providing actionable steps throughout your first year and beyond.

We'll walk you through a chronological timeframe, highlighting what new agents like you need to focus on at each stage. We'll help you find your footing, develop essential skills, and confidently navigate the exciting world of real estate. So, are you ready to dive in? Let's get started!

As a new agent, you're the CEO, president, and owner of a startup business...

But right now, you're a business with zero clients. Your brokerage may provide training, mentoring, and an office during your first few years. Still, your company can't write your business plan or develop your work habits. They won't give you clients. Your success is solely up to you.

20 percent of new businesses fail in the first year. By year two, that number climbs to *30 percent*. Within real estate, the failure rate is between *43 and 54 percent*, with some studies citing *87 percent* of agents failing within five years.

Don't be part of the *87 percent!* If you approach your first year thoughtfully and with a proper plan, you'll see this is one of the best and most rewarding professions out there.

Data Source Links:

[!\[\]\(c50c8b7b2cc2cf9ff925edec0ee94c0d_img.jpg\) Data from the Bureau of Labor Statistics, as reported by Fundera](#)

[!\[\]\(6a9b39b98eb945faa14c645ec99e4eaa_img.jpg\) The Bureau of Labor Statistics & Small Business Article](#)

Use this guidebook as a roadmap. We've broken it down by milestones to reach within your first year to get 'You, LLC' off the ground. However, if you don't follow the timelines exactly, don't worry. This guidebook is like your real estate compass—a trusted resource you can return to throughout your career.

The fundamentals of success apply whether you're new or seasoned, and you'll find tried-and-true basics to reference whenever you need a refresher or help with a new challenge.

But first, let's cover the *costs involved* with starting your business.

Starting a Real Estate Business: Costs You Need to Understand. Like any business, your path to real estate requires an upfront investment. Commissions may not arrive immediately, but several fixed costs are essential to launch your business effectively.

There are upfront costs, such as licensing fees, marketing materials, and potentially joining a brokerage. These initial investments must be covered while waiting for your income stream to start flowing.

Add in Your Expenses:

State Application	<input type="text"/>	MLS Month 1	<input type="text"/>
E&O Insurance	<input type="text"/>	Office Fees	<input type="text"/>
City Application	<input type="text"/>	Business Cards	<input type="text"/>
National Board Application	<input type="text"/>	Misc.	<input type="text"/>
Board Annual Dues	<input type="text"/>	Monthly Total	<input type="text"/>
MLS Application Fee	<input type="text"/>		

The real estate market can fluctuate, and there may be periods with fewer sales opportunities. Having a financial safety net of six months' living expenses allows you to focus on building your business without the immediate pressure of making a sale to cover basic costs. This can be crucial for making sound business decisions and taking calculated risks that could lead to future success.

Notes:

01

your first 3 months

Okay, now it's time to dive in! As a new agent, this is your framework to follow, broken down for you by months.

Your Checklist: *Check Off Boxes to Mark Completion*

Tell your sphere about your new career

Create a database

Choose a CRM

Build Your Sphere of Influence.

Imagine a community of people *who trust you for real estate guidance.*

You may not experience it now, but many seasoned agents attribute their longevity to a well-developed sphere of influence (SOI), a robust network, and a community of people. Your SOI will fuel your success. The strength of your connections directly impacts your career, as an SOI is often used to send referrals your way.

Start by thinking locally. *Family, friends, and neighbors are your closest connections.* They know you best and are most likely to refer you. Don't stop there! Leverage your existing network. Ask trusted contacts for referrals of potential clients who might benefit from your expertise. Your phone's contact list is another goldmine—you might be surprised how many people you haven't connected with yet.

The key to a thriving SOI is genuine connection. *Focus on building relationships over selling.* By providing valuable real estate insights and being a trusted resource, you'll establish yourself as the go-to person for real estate.

Pro Tip: Explore our collection of [🔗 Sphere Marketing items](#)

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Create Your Database.

So, how do you *build* a powerful SOI?

Your closest connections are a great starting point. Think family, friends, neighbors—the people who know and trust you. But your SOI can extend far beyond that.

Ask your existing contacts for referrals from people interested in buying or selling. You might be surprised to learn how many connections you have that you haven't considered.

The key to a thriving SOI isn't just about a long list; *it's about building genuine connections*. Provide valuable real estate insights, answer questions, and be a trusted resource. This way, you'll become your network's go-to person for real estate, leading to referrals and long-term success.

Scripts to Help You Get Started:



Hi John, it's (Your Name). Long time no talk! I'm updating my contacts for my real estate business and I wanted to make sure I had your information correct. I think I may have an old address, so would you mind giving me your current address?



Hi John, it's (Your Name). I hope everything is going well! I was hoping to get some information from you to add to my database of contacts for my real estate business. Would you mind confirming your email address for me?

Building a robust contact database is essential for real estate success. Dedicate time to gathering information from past clients, colleagues, and casual acquaintances. *Set aside a week to work on this*, whether it takes you the entire week or even two.

Consider birthdays and anniversaries as natural touchpoints to connect and provide market updates. Be prepared to discuss your services when appropriate but prioritize building rapport.

Key Takeaways:

- ✓ Create a list of your Sphere of Influence (SOI).
- ✓ The strength of your connections directly impacts your career.
- ✓ Use birthdays and anniversaries as touchpoints to connect with your sphere.

Manage Your Database. Now that you have completed your contacts list, it's time to research and sign up for a Customer Relationship Management (CRM) system. A CRM helps you organize and keep track of everyone you know, but it does much more than that.

The main reason to sign up for a CRM is because it's your central hub for all your contacts, so you don't have to rely on spreadsheets and jotting things down on paper.

You can keep track of conversations you had, important dates (birthdays and anniversaries), and tasks on your to-do lists. A CRM empowers you to tailor your communication, reach out at opportune moments, and help you build stronger relationships.

CRMs also allow you to automate tedious tasks such as sending follow-up emails or scheduling appointments. When you start to use it, you'll be able to uncover the data to help you better understand your sales and marketing efforts. For example, some platforms show whether the recipient has opened your emails. This insight can strengthen your sales strategy, whether you follow up with a call or send a second email.

How to Choose a CRM. When picking a CRM, research and go with the most user-friendly one. You want to get going on managing your clients in the most efficient way possible without spending a ton of time figuring out how to use the platform. Also, consider long-term use because your CRM will become a part of your business and daily routine.

Go on Google and quickly search for the "Best CRMs for real estate agents." You may see agent-focused CRMs like Lion Desk, Follow Up Boss, Wise Agent, Realvolve, and many more.

When researching, it's easy to get overwhelmed, as each CRM can offer different tools and features. Focus on finding one that fits your budget, goals, and needs as a real estate professional.

Notes:

Consider the following essentials you need right away:

- What does it cost?
- Is it easy to organize my contact database?
- Can I categorize my list of contacts?
- Does it have notes and tasking features?
- Are there email capabilities?

Focus on the most essential features mentioned above and stay caught up with the bells and whistles. Remember that the best CRMs are the ones that get used. Don't spend too much money or overanalyze each CRM's offerings. The best basic CRMs are more than capable of doing what you need.

After you choose the CRM you think is best, take time to learn the technology before purchasing. The biggest mistake we see is when agents don't try to learn about the CRM beforehand. You'd never buy a car without test-driving it first, so be sure to get fully educated during your research phase.

These include:

- Watching demo videos
- Signing up for webinars
- Calling customer support with questions
- Reading testimonials and customer reviews

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After You Sign Up for a CRM. First, you must take your contact list and load it into your new CRM. Then, think of your CRM as your home base of operations. Each time you meet a new person or hear of someone interested in buying a home, you can add them to your CRM.

The more you use the CRM, the more you will understand what it can do.

Key Takeaways:

- ✓ Research a CRM and look out for long-term usability.
- ✓ Get educated before you buy.
- ✓ Stay focused on how the CRM can enhance and make your life easier regarding your contacts.

Notes:

02

months 4 to 6

This is the next framework for you to follow and base progress on.

Your Checklist: *Check Off Boxes to Mark Completion*

Create a business plan with SMART goals

Find a mentor

Create a business plan

Keep up with the news

 **Create a Business Plan.** Your business plan acts as a roadmap, guiding your decisions and measuring progress over the next year.

Developing a business plan can feel intimidating, especially for new agents navigating a world of unknowns. Don't hesitate to seek help from your mentor, broker, or a trusted colleague in your office. The Breakthrough Success Plan offers a step-by-step approach to building your business strategy.

So, how do you attract clients and build a thriving business? Here is a roadmap outline of what to think about:

Your Target Market

- What types of property excite you? Residential, commercial, or luxury?
- Which geographic area will you serve?
- First-time homebuyers, investors, or retirees? Understanding their needs is vital.

Market Research

- Analyze current trends in your chosen area.
- Understand average listing prices, days on the market, and buyer demographics.
- What unique aspects define your target market?

Setting SMART Goals (specific, measurable, achievable, relevant, and time-bound)

- Clearly define your goals (number of transactions, gross commission income).
- Establish metrics to track your success (leads generated, conversion rates).
- Set deadlines to stay on track.

Craft a Marketing Strategy

- Create your online profiles on your company's website and create your listings.
- Use platforms like Facebook, Instagram, and LinkedIn, but start with one platform. This helps ease some of the pressure to be everywhere all at once on social.
- Create valuable content to share on social media, your company website, or through email to establish yourself as a thought leader.
- Attend industry events and network with other agents, mortgage lenders, and local businesses for potential referrals.

Leverage Technology

- Utilize customer relationship management (CRM) software to organize leads, track interactions, and manage transactions efficiently.
- Consider online marketing tools to automate tasks such as direct mail and streamline your marketing efforts.

Financial Planning

- Forecast your income and expenses for the year, including brokerage fees, marketing costs, and professional development.
- Determine if additional capital is needed to support your business startup.
- Consider a dedicated business bank account to maintain clear financial boundaries.

Education and Growth

- Commit to ongoing education by attending workshops, conferences, and online courses to stay updated on market trends, regulations, and industry best practices.
- Consider earning real estate specializations to cater to specific buyers or property types.

Find a Mentor. Seek guidance from a successful agent in your office or leverage your existing network to find one. They will be busy, so be sure to approach the mentor/mentee relationship with a structured plan in place.

Pro Tip: Mentors are willing to share how they became successful and be able to impart some of that wisdom to you.

Learn valuable skills like business development and lead generation strategies. Don't be shy; now is the time to actively seek their expertise.

Here are questions to get you going

- How did you get clients when you were a new agent?
- How do you get clients now?
- What are your top marketing strategies?
- How much do you usually spend on marketing and other tactics to get new clients?

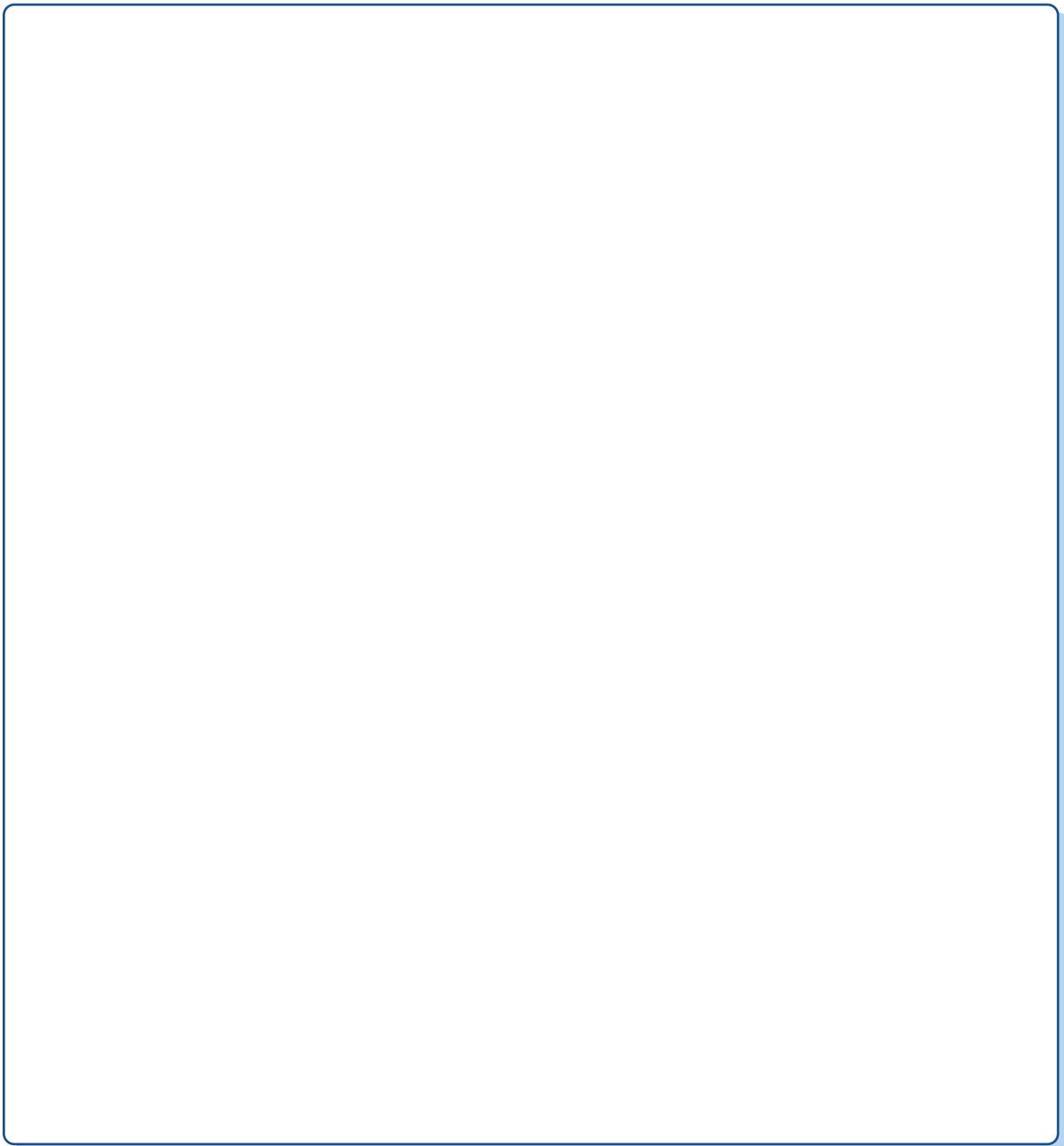
While working with your mentor, ask if you can shadow them to learn the ropes. Use this time to gain a better understanding of

- Events and how certain events were marketed. (What did they do or say?)
- A closing or presentation
- An open house

Notes:

Research a few possible mentors in your network and write them down. Ask your colleagues or friends if they know of any experienced agents in their network that might fit the mold.

Notes:



Reach out to your SOI. Then Tell Them Again: *Craft Your First Letter*

It's time to share the *good news* of your new career in an email or letter—or both!

Send it to your SOI and tell them you're building a client list. Ask for referrals in the letter and include your phone, email, address, and license number.

Pro Tip: With all the other things you need to do as a new agent, why not save time with a pre-written [🔗 New Agent Letter](#) from Breakthrough Broker?

Along with the letter, we recommend sending a [🔗 business card](#) and anything else that may help keep you in mind, like a magnet. It feels a bit old school, but remember, the point is to convey that you're a new agent and need their help.

After you send the letter, track the message in your CRM. Then, create another email to send out the following month to thank everyone for their positive feedback and let them know how your business has been going.

It sounds easy, but often, we hear agents saying they don't want to bother people. They also want to know how frequently they should communicate with their sphere. We always tell them there's no universal number, but a common mistake is for new agents to under-communicate.

Through *repetition*, your contacts keep you in mind as their go-to real estate professional.

Key Takeaways:

- ✓ Reach out to your contacts to find a mentor.
- ✓ Prepare how you'd like to structure the mentor/mentee relationship.
- ✓ Craft your first letter to your contacts, and use a pre-written New Agent Letter.

Get Educated. Knowledge is a powerful tool in real estate. Devour information from various sources to stay ahead of the curve. Read local business and real estate news, national industry publications, blogs from established agents, and updates from your Realtor board.

News Resources

- [Inman News](#)
- [Keeping Current Matters](#)
- [RIS Media](#)
- [Forbes – Real Estate](#)
- [Realty Times](#)
- [NAR News](#)
- [Housing Wire](#)

Apps to Gather News for You. Additionally, you can also turn to real-estate-related articles from multiple publications in one feed with apps like [Feedly](#), [Flipboard](#), [SmartNews](#), and Google News.

Join Online Groups. The best way to learn is through other agents. Join Facebook groups for real estate agents, such as Next Level Agents and Lab Coat Agents.

Pay attention to the language used in these groups and try to understand what works for successful agents.

Books to Read. Picking up a few good books that will give insight into the real estate industry can also help you get up to speed.

- The Millionaire Real Estate Agent by Gary Keller
- Shift: How Top Real Estate Agents Tackle Tough Times by Gary Keller
- 21 Things I Wish My Broker Had Told Me by Frank Cook
- How to Master the Art of Selling by Tom Hopkins
- Sell With Soul: Creating an Extraordinary Career in Real Estate by Jennifer Allen
- Mindset: The New Psychology of Success by Carol Dweck
- Exactly What to Say: For Real Estate Agents by Phil M Jones, Chris Smith, Jimmy Mackin
- Your First Year in Real Estate: Making the Transition from Total Novice to Successful Professional by Dirk Zeller
- The Agent's Edge by Jordan Cohen

Podcasts

- The Tom Ferry Podcast Experience
- Lab Coats Agents Podcast
- House Party
- The Ninja Selling Podcast
- Keeping it Real Podcast

By tackling these priorities, you'll be well on your way to a successful first half-year in real estate. Now, on to the next three months!

Key Takeaways:

- ✓ Bookmark real estate news sites
- ✓ Join a Facebook group for agents
- ✓ Read two to three of the books listed

Notes:

03

months 7 to 9

This is the next framework for you to follow and base progress on.

Your Checklist: *Check Off Boxes to Mark Completion*

- Join industry events/get involved
- Get affiliate partners
- Nail these questions you will get regularly
- Use the examples on page 13 to flesh out scripts
- Create a social media strategy
- Host open houses

Get Involved. Connecting with others in real estate fosters confidence and expands your knowledge base. Networking also opens doors to unexpected opportunities.

Every interaction can lead to a new referral or valuable partnership. Over the next 60 days, make it a point to attend any of the following types of events:

- Company meetings
- Broker open houses
- Trainings/conferences
- Board of Realtors meetings
- Title company events
- Affiliate events
- Networking events
- Charity events
- HOA meetings

Get to Know Your Partners. As a new agent, you may still need to learn about the people in the industry. Ask your mentor, broker, or a trusted agent in your office for several referrals, then set up appointments to meet the following key players.

Mortgage loan *officers* and *title* professionals (in some states, title attorneys)

These professionals derive a portion of their business from real estate agents who refer their clients to them.

Notes:

In a nutshell, here's what they do:

- **Mortgage Loan Officers:** These professionals can offer valuable advice, introduce you to industry leaders, and update you on market trends.
- **Title Professionals:** Title companies often host educational events and provide technology resources to assist you.

Because of this, these professionals are generally interested in building relationships with local agents and can be great resources, especially in the early stages of your career.

Outstanding mortgage and title professionals will be able to:

- Give you advice
- Introduce you to other influential industry leaders
- Keep you up to date on the latest market trends
- Be a sounding board for your new career

They may also have technology through their company that can help you or host educational events and seminars.

Many good affiliates will recognize a new agent's potential and look to help you in any way they can.

Notes:

Start with the following questions:

- What would you focus on now if you were starting as a new real estate agent?
- What technology have you seen other successful real estate agents use to help them succeed?
- Do you have any upcoming webinars or in-person events I can attend?

Pro Tip: There's no expectation of freebies. Mortgage and title professionals have regulations preventing them from offering gifts or incentives.

Focus on building solid relationships with key professionals. Aim for monthly meetings to cultivate trust and collaboration. These alliances will benefit your business growth and provide valuable connections for your clients.

Key Takeaways:

- ✓ Get educated in the industry by reading articles and books, listening to podcasts, and attending events.
- ✓ Ask your mentor or trusted agent in your office for referrals to crucial professionals such as loan officers and title professionals.
- ✓ Come to the table with critical questions once you make those connections.

Improve Your Agent Skills. As a real estate agent, being prepared for client inquiries is vital. Here are some frequently asked questions and how you can craft winning responses:

- How's the market?
- I want to sell, but what's my home worth?
- Why should I choose you?
- How will you market my home?
- Tell me about your company.
- What are the interest rates right now?
- Is it better to rent or buy right now?
- I'm calling about the listing you have on ABC Street. Can you tell me about it?

See the questions and the responses below. Absorb the main points and make these your own. Remember to practice. You want to sound confident when you're in front of potential clients.

Let's examine each of these questions a little more closely to generate some ideas for talking points.

Practice Makes Perfect:



Question: *How's the real estate market?*

Response: *It's pretty crazy right now! I was speaking with my broker and she was telling me that one of the company's listings was put on the market on a Thursday, received 21 offers by Friday afternoon, and was under contract for \$79,000 over asking price by Friday at 5pm. I am hearing these stories at every office meeting! For homeowners, right now is a great time to sell as the market is near it's top end as we are seeing some signs of it cooling off. For buyers, interest rates are still at an all time low making it more affordable to buy a home, the big challenge is the lack of homes available to buy.*

Create a Social Media Strategy. Developing your social media plan will help you in the budding stages of your career and beyond. You don't need to create an intricate plan, and it's okay if you're not an expert in all the platforms. The best way to avoid feeling overwhelmed is to simply pick one or two platforms you feel comfortable posting on and stick with those.

You may consider starting with a self-promotional post on your social media profiles to notify your sphere of your new career.

Here are a few ideas you could use to share your experiences on your Instagram Reels or Stories:

- Setting up an [🔗 Open House](#)
- [🔗 New Listings](#)
- [🔗 Sold Properties](#)
- Provide valuable market knowledge with [🔗 Community Reports](#) and [🔗 Market Snapshots](#).

Pro Tip: Follow popular real estate professionals on Instagram and Facebook to get a better grasp on their posts. Look at the posts that get the most likes and comments and take notes on what kind of content they produce.

Keep a pulse on what's happening in the market by following these publications:

- [Inman News](#)
- [Keeping Current Matters](#)
- [RIS Media](#)
- [Forbes – Real Estate](#)
- [Realty Times](#)
- [NAR News](#)
- [Housing Wire](#)

Notes:

3 Social Tips and Ideas:

- 1 **Use trending topics:** Apps like Feedly and Flipboard to aggregate real estate news in one place. You can use the news as a jumping point and post what is relevant to buyers and sellers. In your caption, include your opinion or thoughtful expertise.
- 2 **For a yearly investment of \$107,** Breakthrough Broker has pre-made [social engagement posts](#), so you don't have to think about it. From holidays to just listed and sold, you can post quickly and stay in front of your audience consistently.
- 3 **For more help on social media strategies and tips,** check out the following webinars to help you capture the attention of buyers and sellers.

[How to generate more leads on Instagram](#)

[What to Post on Social Media](#)

[Generate More Leads Through Instagram](#)

Pro Tip: Drive engagement by posting one of Breakthrough Broker's Social Posts listed above. [See our entire collection of social media posts and stories here.](#)

While social media is a fantastic tool for connecting with potential clients and staying top-of-mind, remember that real estate thrives on relationships.

Think of social media as a powerful amplifier for the connections you build in person.

- Use engaging social media content to showcase your expertise and personality, attracting potential clients who resonate with your style.
- Leverage social media to nurture existing relationships with past clients and industry contacts.
- Once you've established a connection online, take it offline! Schedule coffee meetings, attend industry events, and actively build rapport with people in your community.

Social media is a valuable tool, but real-world connections solidify trust and lead to successful transactions.

Host Open Houses. The first year as a real estate agent is a whirlwind of learning how contracts work, scheduling showings, and negotiating with other agents. While mastering these intricacies is crucial, don't stress out too much because the core part of your business is finding buyers and sellers.

A great way to do that is to host an open house. This allows you to connect directly with the folks who are actively searching for homes. Since some attendees might not have a realtor, you can build rapport, showcase your expertise, and potentially convert them into clients.

Pro Tip: Talk to your broker about co-hosting open houses with experienced agents in your office.

Host Your Open House and Build Your Confidence: 3 Ways to Prepare

- 1 Talk to the Listing Agent:** Have a thorough conversation to understand the property's details. Then, when potential buyers show up, you can answer their questions properly and confidently.
- 2 Do Your Comps:** Analyze the homes recently sold in the area. This knowledge provides valuable talking points and demonstrates your market expertise.
- 3 Know the Competition:** Research similar listings within a three-mile radius. If the open house isn't their perfect fit, offering alternative options positions you as a helpful resource.

Effective open houses require proper planning and execution. To ensure a successful event, utilize resources such as Breakthrough Broker's [open house marketing items](#).

Key Takeaways:

- ✓ Use our script to answer common client questions
- ✓ Share your new agent experiences on Instagram, such as hosting your first open house
- ✓ Host an open house but prepare ahead of time by knowing comps and talking to the listing agent

04

months 10 to 12

This is the next framework for you to follow and base progress on.

Your Checklist: *Check Off Boxes to Mark Completion*

New Agent Resources

Self-Promotional Brochures

Geographic Farming

Social Media Posts

Presentations for Clients

Pro Tip: Refer to your business strategy and highlight your value at every client touchpoint.

Ways to Grow Your Business. Making connections is the name of the game. As you approach your first year as an agent, having the right marketing materials can help you scale your engagement efforts and connections.

Breakthrough Broker's various tools and features can support you along the way. Think of it as your personalized marketing studio, offering social posts, brochures, flyers, postcards, single-site listings, and more.

Check out the following items to get you started, plus ideas on how to use them.

[New Agent Resources: Hit the Ground Running](#)

The initial learning curve in real estate can be steep. By intentionally learning quickly, you'll shorten that curve and become more productive sooner, allowing you to focus on client acquisition and business growth.

Breakthrough Broker has an entire section dedicated to new agents. This includes training and guidebooks on everything from sphere marketing to creating a Marketing Action plan.

[Geographic Farming: Find New Clients](#)

This prospecting tool is one of the best ways to get your name out to a specific area and engage prospective buyers and sellers. With an Address Mapping Tool, you can target a new neighborhood and send direct mail items, such as postcards, pre-written letters, and door hangers to get noticed.

Pro Tip: To better understand what geo-farming entails, check out our  [guidebook](#).

[Presentations: Convey Your Value](#)

Today's changing real estate environment means you must prioritize showing your worth. Presentations can help you stand out in a competitive market and build trust.

[Self Promotion Resources: Craft Your Brand](#)

Now is the time to tell your story and convince potential clients why you're the best fit. Consider why someone would want to work with you on the most significant financial purchase of their life.

Even though you're new to being a real estate, you're not new to life. You've likely bought a house, had kids, and different careers—many agents were nurses, teachers, and salespeople before transitioning into real estate. These experiences are essential to draw from when someone wants to know why they should choose you.

[Proof of Production: Social Media Posts](#)

Showcase your local market expertise on social by keeping your followers informed on market trends and identifying success stories.

Pro Tip: Ask your broker or manager to give you information about recent, successful sales—such as “sold \$10,000 over asking price” or “on the market for three days.” Then share it on your social media channels.

Notes:

Wishing You Success: You've Got This! Accomplished real estate agents share a common thread—a passion for their work, clients, and communities.

Successful agents love what they do, and their passion is simply magnetic. They attract clients and peers, and their business benefits tremendously from that desire.

Our best advice is to find that passion, complete the steps in this guidebook, and start your profitable and rewarding real estate career.

Pro Tip: Explore our [🔗 New Agent Marketing resources](#) on Breakthrough Broker to ensure your success!