

# WBNL COACHING

## WORKSHOPS & SEMINARS



2020

WBNL Coaching is the BUSINESS and LIFE coaching and training branch of Wandering But Not Lost Enterprises. We are a team of heart-centered, like-minded, coaching professionals who empower people, like you, who want to discover and realize their full potential. It's all about aligning with your passion and attitude then connecting both with the path that will lead you to success and prosperity.

ALIGN | CONNECT | PROSPER

# Wandering But Not Lost

*Discover Your Path*

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At WBNL Coaching, we specialize in providing training and coaching workshops for real estate professionals, agent team leaders, managers, and brokers. Our training focuses on the principle of "running your real estate business as a true business." Therefore, the training sessions will show the participant how to implement effective real estate and business systems. The training courses include interactive exercises with several designed to be a hands-on workshop.

Our goal is to provide you with coaching and training that is tailored to fit your needs, so beyond our standard 2020 course curriculum we can work with you to develop other topics and customize the training as needed for your audience and objectives.

Our workshops and seminars include a complete companion workbook and each attendee will have access to our online platform for all workshop materials; slide decks, applicable checklists, action plans and other bonus downloads.

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# Our 2020 Course Curriculum

## *Discover Your Path*

We look forward to getting in front of your team so that, together, we can experience a fresh new approach to coaching and training. An environment that is based upon their needs. Our goal is for agents, managers and brokers to leave our sessions energized and ready to increase their business - not just tomorrow but into the future.

Below is our 2020 Course Curriculum, the following pages dive into each topic with more detail.

We customize each session to fit you and your organization, please contact us for a consultation, pricing, and scheduling. Here's to being forever Wandering But Not Lost.

### Real Estate Agents and Teams

- 3 Steps to a Powerful Real Estate Business Plan *page 3*
- The Art & Science of Building a Profitable Real Estate Agent Team *page 3*
- How to Double Your Income: Hire & Leverage Your Perfect Assistant *page 4*
- Mastering LinkedIn: Maximize Your Profile, Connect & Build Your Network *page 4*
- How to Create an All-Star LinkedIn Profile *page 5*
- Your Database IS Your Business: 7 Steps to Building Your Referral System *page 5*
- Lead Generation: How to Attract, Cultivate & Convert More Clients *page 6*
- Real Estate Websites: Why You Need One & How to Generate Leads *page 6*
- Connecting Your Real Estate Business: The Four Pillars to Success *page 7*
- Social Media Marketing Strategy for Your Business *page 7*
- A Roadmap to Success for Your Business and Life *page 8*

### Broker, Manager, Trainer Series

- Attracting a Team of Professionals (Recruiting System) *page 8*
- Coaching Agents to Success *page 9*
- The Art & Science of Building a Profitable Team for Brokers and Managers *page 10 | 11*

## 3 Steps to a Powerful Real Estate Business Plan

(1-3 hours)

In order to operate your real estate business as a true business it is critical to begin with a comprehensive business plan, written SMART goals and tools to measure and track your results. In this workshop you will learn how to implement the three steps to real estate agent goal setting and business planning:

- 1 Write your specific goals and desired outcomes
- 2 Customize our complete real estate business plan template
- 3 Measure and track your activities and results

Participants can also access the WBNL Coaching free membership platform to download all of business plan templates and forms and video training course on business planning and setting goals.

## The Art & Science of Building a Profitable Real Estate Agent Team

(3-4 hours)

This training is for you if...

- 1 You are interested in building a profitable team or brokerage
- 2 You already have a team and want expert team building training & coaching
- 3 You want to learn how to implement effective business systems and hire an assistant
- 4 You want to discover whether or not you are right for agent team building

In this action-specific and strategy-packed workshop, you will learn how to...

- Decide on a Team Model, Compensation & Structure
- Implement Effective Team Systems
- Recruit, Hire and Retain the Right Team Members
- Coach, Manage and Lead a Successful Team
- Build an Asset and Create Your Exit Strategy
- Leverage the Top 10 Team Leader Best Practices

## How to Double Your Income: Hire & Leverage Your Perfect Assistant

(1-3 hours)

Hiring the right people for the right positions in your organization is a cornerstone to success for all business owners. In this workshop, we will share our turnkey hiring and onboarding system for attracting, hiring and retaining the right administrative support staff for you.

- How to know when you are ready to hire an assistant
- Create job descriptions for administrative and other assistants
- Example ads and where to run them
- Licensed vs. Unlicensed assistants
- Compensation plan examples
- The pros and cons of independent contractor vs. employee
- Our step-by-step hiring guide and onboarding system
- How to conduct an effective interview
- Tools, apps and systems for managing tasks and projects
- Keys to training, managing and retaining your perfect staff members

## Mastering LinkedIn: Maximize Your Profile, Connect & Build Your Network

(3 hour Workshop)

LinkedIn is a MUST for all business owners! LinkedIn is a powerful search engine and database you can master to grow your business and become an authority in your field. The first step is to create an All-Star profile and then strategically connect with your own database, peers, influencers and prospective customers. Bring your iPad or Laptop for this hands-on workshop, you will learn:

- Over 20 power tips on optimizing your profile for search
- How to add a branded cover image
- The importance of using keywords throughout your profile
- What content needs to go in your summary
- How to add images, video and slide-decks to sections
- Using Slide Share to build expertise and credibility
- The keys to publishing a post to increase your exposure
- How to integrate the daily 5 connect plan to increase your connections
- Tools to schedule and automate your status updates
- Strategic connection techniques to grow your network
- Using the advanced search to build your network
- Our strategy on getting more recommendations
- The power of LinkedIn Groups and how to start your own
- Overview of the suite of LinkedIn mobile apps

## *How to Create an All-Star LinkedIn Profile*

(1 hour Workshop)

LinkedIn is a MUST for all business owners! LinkedIn is a powerful search engine and database you can master to grow your business and become an authority in your field. The first step is to create an All-Star profile and then strategically connect with your own database, peers, influencers and prospective customers. In this workshop you will learn:

- Over 20 power tips on optimizing your profile for search results
- How to add a branded cover image
- How to create a custom URL and optimize your contact info
- The importance of using keywords throughout your profile
- What content needs to go in your summary
- How to add images, documents, video and slide-decks to sections
- How to integrate the daily 5 connect plan to increase your connections

## *Your Database IS Your Business: 7 Steps to Building Your Referral System*

(1 - 3 hours)

This focus of this workshop is how to implement the most important system for your real estate business – your database and referral system. Topics covered include:

- Learn the key steps to building your referral system and how to get more referrals from your database
- How to choose the right CRM (Client Relationship Management) software solution for you
- How to leverage and effectively use your CRM
- Reconnecting with your Database (including your past clients and sphere of influence)
- What do you send out to your Database, how often and other strategies for connecting

## *Lead Generation: How to Attract, Cultivate & Convert More Clients*

(1-3 hours)

The primary objective of this workshop is to share the most effective methods to generate new business using both online and offline strategies. We will revisit traditional methods and share some innovative ideas to implement. You will also learn about the Internet and social media tactics that get the best results.

- Your database IS your business - how to generate more referrals
- Must Have Tools - IDX website, CRM, Landing Page(s)
- Ways to capture more leads from your listing marketing plan
- How to leverage the major real estate portals (Zillow, Trulia, Realtor.com)
- Drive more traffic with offline and traditional marketing
- Implement effective Social Media Marketing Strategies
- Paid Advertising – pay per click, lead services, lead generation platforms
- The keys to converting leads to closed transactions

## *Real Estate Websites: Why You Need One & How to Generate Leads*

(1-3 hours )

A real estate website is a necessary tool for your business. In this training session, you will learn how to choose the right website solution for you and the best methods to leverage it for lead generation.

- Why you need a real estate website
- What features and functionality is important in choosing a website host
- Templated Website vs. Blog site
- What domain name should you use (your name vs. market keywords)
- Promoting your website online and offline
- Lead capture and call to action ideas
- How to generate traffic and leads to your website
- The keys to lead capture and conversion

## Connecting Your Real Estate Business: The Four Pillars to Success

(1-3 hours)

In this workshop, you will discover how to leverage the four pillars (your database, farming, social media and networking) to make more connections, build your relationships and generate more business.

- Your Database IS your Business – the four irrefutable laws of a database
- How to leverage your client relationship management (CRM) software
- Developing a 30-40 connect plan
- Implementing your referral system
- Farming is more than geographic – understanding niche, demographic and psychographic farming
- Building your 24+ connection plan for your farm(s)
- Leverage your farm for more success
- The power of networking to build your relationships
- Leveraging LinkedIn for building an agent-to-agent network
- 5 strategies for building your LinkedIn network and to convert clients

## Social Media Marketing Strategy for Your Business

(1-3 hours / Custom schedule)

The primary objective of this workshop is to help you determine the best social media platforms and strategies for your business based on your target markets, your client's preferences and your overall objectives and goals.

- Identify your goals and objectives for social media
- Knowing your target audience /perfect client and where they are online
- Overview of the key social media sites (Facebook, LinkedIn, Twitter, Instagram, YouTube)
- Keys to powerful profiles on each platform
- Online personal branding and reputation management
- 12 strategies to dominate search results for your name or brand
- Visual Content marketing – how to create graphics that convert
- Most effective types of posts and updates
- Creating your hashtag business strategy
- 5 x 5 plan for connecting on LinkedIn, Facebook, Instagram
- Apps for scheduling and managing your posts on the key platforms
- Tools & resources to monitor your online brand

## A Roadmap to Success for Your Business and Life

(1-3 hours)

In this workshop, you will learn effective strategies to help you gain clarity, focus and build an action plan for your business and life. Our exclusive "Roadmap to Success" workbook is included.

- Reflect on successes and lessons learned in the past year
- Select your primary focus areas and set your intentions (business and personal)
- Learn the keys to writing effective goals and outcomes
- Tools to use now for accountability, project and task management
- Implement the daily roadmap to stay focused on your daily 5 and other action items

## *Attracting a Team of Professionals (Recruiting System)*

- Leadership and Culture are the attraction and retention secret
- What is your unique value proposition for agent attraction?
- Create Your Perfect Team exercise
- Implement the 8 Step Attraction Model
  - 1 Set your goals for agent hires
  - 2 Identify your lead sources and strategies (20 proven tactics)
  - 3 Create your top 100 list and action plan
  - 4 Refine your affiliation proposal (recruiting presentation)
  - 5 Make the connections (call, text, email, mail – scripts, email samples)
  - 6 Conduct interviews (5 keys to a successful interviews)
  - 7 Effective follow-up program (CRM, tracking, accountability forms)
  - 8 Transition plan and onboarding process
- Retaining quality, productive professionals
  - Branch/company support
  - Awards/recognition program
  - Effective office meetings
  - The power of coaching

# Coaching Agents to Success

## (Custom Schedule)

### Coaching - Mindset

- What is coaching? Foundation of Successful Coaching
- Mastering the key coaching skills – Ask Effective Questions, Listen, Observe, Feedback, Empower
- The Wanderers Profile powered by Winslow System
- Three prerequisites for change
- Communication and Personality Styles
- Basic NLP techniques
- Coaching agreement and accountability forms/tools
- Recommended Reading List

### Coaching - Skillset

Conducting the Real Estate Business Systems Assessment

- Set priorities/systems to work on with agent
- Establish coaching specifics/agreement
- Set expectations and process

Fine-tuning and/or implementing effective business systems

- |                                       |  |
|---------------------------------------|--|
| • Business Plan & Goals               | • Working with Buyers                        |
| • Defining a Unique Value Proposition | • Escrow System                              |
| • Personal Marketing / Branding       | • Social Media Marketing & Internet Strategy |
| • Past Client/Referral Business       | • Lead Generation Systems                    |
| • Sellers and Servicing the Listing   | • Follow-up & Tracking Systems               |

### Hiring an Assistant

- Leverage company transaction coordinator first
- When is an agent ready for an assistant?
- How to recruit, interview, assess and hire
- HR considerations, payroll
- Job description, duties and delegation

### Coaching Approach to Recruiting Agents

- Role play and practice scripts for recruiting

# The Art & Science of Building a Profitable Team for Brokers and Managers

## (Custom Schedule)

### **Team Building 101 – How to Run a Profitable Team**

- What is team building? Why do I want a team?
- The team building model and philosophy
- Four types of people and how they fit
- The five successful components of any business
- Team Leader Agreement & Company Policy
- Hiring key players - Team Manager & Admin Support
- Your Team Vision, Mission & Core Values (UVP)
- Establishing and running your business like a real business

### **Company-Level: Team Opportunities, Policies, Challenges**

#### ***Opportunities: Win - Win - Win - Win (Potential)***

Team Leaders, Team Members, Clients and the company all stand to benefit with effective team building that is supported at the Broker level. The keys to success are clear policies and guidelines and coaching teams to successfully implement effective systems. Opportunities and benefits include:

- Leverage time & resources
- Stability, increase productivity and commissions
- Enhanced Client Service and Experience
- Increase Production & Market Share
- Development of stronger individual agents
- Teams attract and recruit agents from outside company

#### **Potential Challenges with Teams**

- Recruiting from within the company
- Recruiting between in-house teams
- Awards & Recognition
- Disputes, terminations and dissolution
- Legal liability & risk

# The Art & Science of Building a Profitable Team for Brokers and Managers

## Company Team Policy Considerations

- Team definition
- Recruiting within the company
- Written Agreements
- Production Awards
- Branding / Team Names
- Commission disbursement
- CAP agreements

## Coaching Team Leaders and Managers

- How to Implement Effective Team Systems
- Recruiting, Hiring and Retaining the Right Team Members
- Coaching, Managing and Leading a Profitable Team

## Who We've Worked With

REALTYONEGROUP



Women's Council of  
REALTORS®

The  
WALT DISNEY  
Company



THE BRODKIN REALTY GROUP



FloridaRealtors®

NEVADA CE.COM

FIRSTTEAM®  
REAL ESTATE

Prudential  
Real Estate

Prudential  
Americana Group, REALTORS®

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# Discover the World of WBNL Coaching

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### 3 Steps to a Powerful Real Estate Business Plan

Give our CYRB course a test drive with free access to Module 1 and begin to Build Your Business Plan.



### Connecting Your Real Estate Business

This certification course includes modules on agent business planning, business & financial essentials, & designing your exit strategy.



### Intro to Team Building

A mini-course with 12 power tips on how to build a successful and profitable real estate team. We initially recorded this "evergreen" content as a Facebook ...



### Real Estate Team Builder

Real Estate Team Builder is a turnkey system that takes you from the foundation to retirement w/ over 65 training units and 110+ downloadable docs.



### Hiring an Assistant Course

A turn-key solution to expanding your business through hiring and training an assistant so that you can focus on the money-making priorities of your business.



### Agent Referral Network

In this course, you will learn how to build and leverage your own national & global agent referral network.



### Connect with Social Media & Tech

In this course, you will learn how to use social media and technology tools to connect and build relationships with clients and prospective customers.



### Align, Connect, Prosper!

We will discuss concepts & strategies for living in the now, creating desired change in your life & setting your intentions & focus.

# Who We Are

## *Discover Your Path*

Awareness and alignment are the keys to success. At WBNL Coaching we empower, listen, and coach from an alignment of the heart and mind. For us, listening is paramount. We aren't here to tell you what to do next, we are here to understand where you are in your business and help you discover what the best next step may be.

You'll be heard with us – we listen.



*Jan O'Brien*

CO-FOUNDER, WBNL ENTERPRISES |  
BUSINESS & LIFE COACH, SPEAKER, TRAINER

As a real estate broker, coach and industry leader for over 26 years, Jan is keenly aware that the single biggest obstacle in any business is implementation of the basic systems and activities that are the foundation of a prosperous and long-lived career.

With this in mind, Jan builds programs and systems around that and gets the fear out of the way. Once that is accomplished, the sky is the limit. She has trained 1000's of real estate professionals and coached 100's of top producing real sales professionals, teams, managers and brokers to implement effective systems that allow them to thrive.

Learn more about Jan on LinkedIn - Click [HERE](#)



*Matt Emerson*

CO-FOUNDER, WBNL ENTERPRISES |  
BUSINESS & LIFE COACH | TRAVOLOGIST

Matt's philosophy in life and business can be summed up with ease; look for the best in people, listen more than you talk, be inclusive, create balance, and make each day better than the day before.

This has served him well during his 29 years of leading individuals, teams, and companies to success. Understanding what motivates someone and how they can best reach their personal goals and improve their quality of life has always come easy to Matt and he enjoys being a part of that journey.

Taking charge of your destiny is the most freeing & empowering thing you can do – let's get to work!

Learn more about Matt on LinkedIn - Click [HERE](#)