Wake-Up w/YPN 2026 Quarterly Series

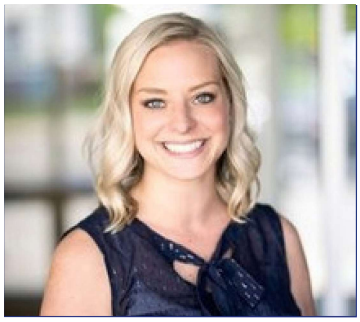
The Three P's of Success:

People, Platforms, & Processes



September 24, 2026:

Platforms:
Tools of the Trade



Panelists: Cassandra Clark, Ashley Schaefer, Rustin Scott
Moderator: Melissa McDermott

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Notes:

PLATFORMS: THE TOOLS OF THE TRADE

Great ideas are only valuable when you can put them into practice. This handout is designed to help you capture the insights, strategies, and real-world advice shared by our panelists and turn them into action. We hope you walk away with tips on measuring what matters, building a personal brand that stands out, and creating CRM systems that keep you organized and connected. Please use the Notes section on the front of this flyer to jot down ideas, questions, and action items you want to take back to your business.

Also, in advance of today's session, we invited our panelists to share a favorite quote, tip, book, tool, and/or podcast that has been helpful to them. They shared some great tidbits! Please see their submissions below**:**

Melissa McDermott (melissamcdermott@kw.com):
Branding: One of the best things I have learned is to make it your own. There are so many things we are told we "should" be doing in real estate, and I don't think you have to do all of them. Pick one or two things that work for you, fit your personality and your business, and then be consistent with them. Consistency matters much more than trying to do everything everyone else is doing.
Relationships are probably the biggest piece of my business. Stay in touch with people after the closing. Answer your phone. Communicate, communicate, communicate. I think we sometimes make relationship management much more complicated than it needs to be.
Metrics: I always say that I track my lifestyle. Of course I know my numbers, but my goal isn't simply to sell the most houses possible. My business needs to support the life I want to live. For actual tracking, I use KW Command, but I have also gone a little old school. I like things I can see, so I use a whiteboard where I keep my goals, homes sold, and current clients in front of me.
Tip: If I were giving one piece of advice to a newer agent, it would be to build your database to 200+ people as quickly as you can and then consistently touch those people 33 to 66 times a year. Don't spend years looking for the next new lead when you haven't built relationships with the people you already know.
Favorite Books: A few of my favorite books are Ninja Selling by Larry Kendall, The Millionaire Real Estate Agent and SHIFT by Gary Keller and coauthors, and Profit First by Mike Michalowicz.

Ashley Schaefer (ashley@hellohomesgr.com):
Tool: I use Airtable to track all of my transactions and numbers. It works much like a spreadsheet, but it also makes it easy to collaborate with others, so my office and administrative team can access and update the information as needed. It's essentially a more flexible, collaborative version of Excel, and it works well for me.
Quote: I know the general impression of real estate is that it's "easy money," and sometimes we make it look like we don't do much. But we know that's not the reality. Building a successful career means putting in the time to build relationships, showing up when it's hard, getting creative when things don't go as planned, and always being honest. There's no secret formula - it comes down to being willing to put in the work.

Rustin Scott (rwscott01@gmail.com:
Quote: "*Give whatever you are doing and whoever you are with the gift of your attention.*" ~ Jim Rohn
Lately, I've really liked this quote. We are so caught up in our phones and screens that giving someone our undivided attention has become increasingly important. It's a simple thing, but it can make such a difference... not just with our clients, but with our family and friends as well.
Tool: "*The best CRM is the one you will use*." Most of you have probably heard this saying, and I think there's a lot of truth to it. My CRM is actually a very simple Excel spreadsheet that I've created and revised over the years. It isn't fancy, but it works for me and, most importantly, I use it consistently. I've created a simplified version of it as a sample. Please visit the link below to take a look:
https://docs.google.com/spreadsheets/d/1bUs-frzZBvLxndiqZgbP6jPjz4pH25Tez2Wu2tcl1QQ/edit?gid=1112301350#gid=1112301350

Cassandra Clark (cassandra.clark@kw.com):
Quote: "*Nothing is as good as it seems, and nothing is as bad as it seems. Somewhere in between lies reality*." ~ Lou Holtz
Favorite Book: Living Untethered by Michael A. Singer
Podcasts: Think Like a CEO with Gary Keller, and MREA Podcast
Tip: Be humble enough to admit what you don't know. Ask questions, learn from people who are ahead of you, take action, and keep adjusting as you go. You'll never know it all, and some of my biggest growth has come from simply being willing to ask questions and learn.
Tracking/Metrics: I use BoldTrail for CRM and relationship/lead management and Sisu for tracking our real estate team's production, activities, and key metrics. I'm a big believer that what gets measured gets managed. Tracking the numbers helps us identify opportunities and where things may be breaking down instead of making decisions based on feelings.

SAVE THE DATE FOR OUR NEXT EVENT:
DECEMBER 17 (SAME TIME AND PLACE) - THE THREE P'S: PUTTING IT ALL TOGETHER