

Charis Moreno Dallas conference 2026-03-17 11:21:16

Date Time: 2026-03-17 11:21:16

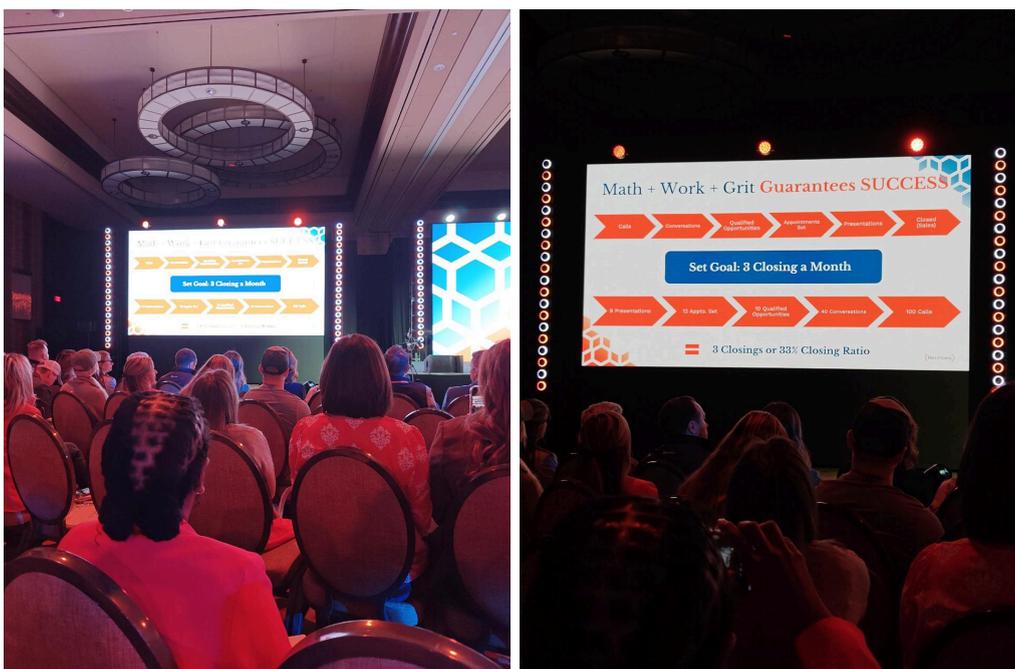
Location: NextHome Conference Dallas TX

Instructor: Charis Moreno

Summary

This lecture presents a practical framework for sales success using a reverse-engineered approach to goal setting. The core formula for success is “Math + Work + Grit.” To hit a target like three monthly closings, work backward to determine the required calls, conversations, and appointments. Quality of communication and the sales pitch outweigh sheer call volume. If conversion funnels underperform, improve one of three areas: the contact strategy, the meeting confirmation process, or the sales pitch. Track personal metrics, practice consistently, and learn from peers. Tools and community help, but personal effort (“doing the reps”) is irreplaceable—consistent daily action drives long-term success.

Knowledge Points



1. The Mathematics of Sales Success

- **Reverse-Engineering Sales Goals**

- The sales path follows a predictable funnel: Qualified opportunities lead to appointments, then presentations, and ultimately closed sales.
- Work backward from the desired outcome. To achieve three closings a month (top producer level), identify the preceding steps.
- Example calculation: 100 calls → 40 conversations → 12 appointments set → 10 qualified opportunities → 8 presentations → 3 closed deals (assuming a 33% close rate). Another example from an image indicates that 8 monthly closings would start with 96 calls.

- **The Importance of Tracking Metrics**

- Track your personal conversion ratios at every stage of the process.
- The speaker's numbers: 10 leads → 8 people reached by phone → 6 conversations → 4 applications → 2-3 franchise closings.
- Rely on your data—not feelings, market noise, or headlines—because your business responds to measured performance.
- A tracker from the Werthman Success System (available through Next Home Growth Lab Premium) is offered; attendees can request a sample by emailing james@nexthome.com.

2. Optimizing the Sales Process

- **Focus on Quality, Not Quantity**

- “Make more calls” is ineffective if the strategy is flawed.
- High call volume with low meeting conversion indicates a contact strategy problem.
- Improve pitch and communication methods (voicemail, text, email) for effectiveness.
- Ask clients their preferred communication method (text, email, etc.) to boost engagement.

- **Troubleshooting the Sales Funnel**

- Improve success by identifying and fixing specific weak points:
- **1. High Calls, Low Conversion (Meetings):** Fix the contact strategy. Enhance pitch and communication to secure first appointments.
- **2. High Appointments, Low Show Rate:** Fix the confirmation process. Use automated reminders (e.g., HubSpot emails 3 days and 24 hours before, plus a text the morning of the meeting) to reduce no-shows and enable rescheduling.

- **3. High Show Rate, Low Sales:** Fix the pitch through practice and “doing the reps.”
- **The Power of Practice and Collaboration**
 - Strengthen a weak pitch through consistent practice.
 - Practice with peers (“Next Homey”) willing to help within the organization.
 - Collaboration between Jamie Downey and Graham’s offices—co-leading training sessions—is a strong example of cross-market learning.

3. Mindset and Strategy for Long-Term Success

- **Consistency Over Intensity**
 - Consistent smaller efforts compound more than sporadic intense bursts.
 - One day of 100 calls is less impactful than steady calls over 66 days.
 - The market responds to consistent work.
- **Individuality in Strategy**
 - Don’t copy others’ “workouts” or business strategies blindly.
 - New agents, top agents, and teams need different approaches—just as a mom, a retiree, and an athlete (Simone Biles) need different training and nutrition.
 - Know what competitors (Compass, Realty ONE, RE/MAX) are doing, but don’t mimic—focus on what fits your model.
- **The Necessity of Recovery**
 - Recovery supports physical and mental well-being, crucial for sustained growth.
 - A two-week Europe vacation highlighted that if the business can’t run without you, you have a job—not a business.
 - Breaks, like attending the conference, are vital for education and rejuvenation.
- **Personal Responsibility and Action**
 - AI and tools can’t “do your reps.”
 - With facilities, tools, culture, training, and support available, success still hinges on personal execution.
 - Call to action: study what you learned, build a plan, and implement daily. Without implementation, the conference won’t matter.

Questions

- [Insert Question/Confusion]

Assignments

- [] 1. Set a monthly closing goal and work backward to calculate the required calls, conversations, and appointments.
- [] 2. Start tracking personal conversion rates at each stage of the funnel (calls to conversations, appointments to presentations, etc.).
- [] 3. Identify the weakest link in your funnel—contact strategy, confirmation process, or pitch—and prioritize fixing it.
- [] 4. Practice your pitch with a peer/colleague to gather feedback and improve.
- [] 5. Email james@nexthome.com to request a sample sales activity tracker.
- [] 6. Build a consistent daily/weekly work plan instead of relying on sporadic intense efforts.
- [] 7. Schedule recovery time or breaks to prevent burnout and maintain performance.
- [] 8. Review conference notes when you return and create an actionable implementation plan.