



THE 7-STEP GUIDE FOR NEW & NEWLY-LICENSED AGENTS

2 0 2 6 E D I T I O N

Real Estate Agent Roadmap.

From new agent to the industry's newest top producer, without playing
“Random Real Estate.”

BY JACOB LAWLOR

Regional Branch Manager · First Team Real Estate

Mission Viejo + San Clemente Offices

J A C O B L A W L O R . C O M

DRE #01899247 · First Team DRE #01008773

WELCOME

Financial freedom, and the fear that stops most new agents.

Making the jump into real estate is exciting and nerve-wracking at the same time. The promise of uncapped income and a schedule you actually control is what pulls people in. The uncertainty of pure commission is what pushes them away.

The fear I hear from new agents is almost always the same: “How do I make sure that, after all the time, money, and hassle of getting my license, I actually become successful?” As the Regional Branch Manager for First Team Real Estate’s Mission Viejo and San Clemente offices, my entire job is helping new agents answer that question with their own business.

In no other industry are you handed the ability to earn six figures with complete control of your schedule. No timecards. No supervisors checking your every move. You are completely free to come and go, and to make as little or as much as you decide.

THE HARD TRUTH

Most people don’t succeed in real estate. Here’s why.

According to the National Association of REALTORS®, 34% of agents quit after their first year in the business, and 87% are gone within five years. Real estate sales is an entrepreneurial business. You are starting a small business the moment you hang your license. The problem is that most new agents don’t treat it like one.

Most agents who fail are missing four things:

- **A system:** a repeatable process that produces predictable income.
- **A mentor:** someone whose job is to make sure you succeed.
- **Commitment:** the willingness to actually do the work, not just talk about it.
- **Social support:** people around you who believe this is going to work.

This e-book introduces the concepts and tactics that help new agents avoid those pitfalls. In our Mission Viejo and San Clemente offices, we go much further through formalized training and one-on-one coaching, but this is the foundation.

MY STORY

“Is real estate right for me?”

Many of the real estate “gurus” and “experts” will tell you that to succeed, you need six months of reserves in the bank, a background in commission sales, a home you’ve already bought and sold, a deep sphere of influence, and a fallback credit card to live off of if things get rough.

That was not my case.

When I started, the real estate recession was at its deepest point. Everyone closest to me told me I had to be insane to get in. I had never bought a house. I was still living at my parents’ place, sleeping on a bed with no sheets (ask my wife). I had never worked in sales. I didn’t understand commission. I had no credit card and no loan history beyond student loans.

My sphere of influence was my college friends. Their focus was on which beer had the highest alcohol by volume for the money, not how to buy a house. On the morning of my state licensing exam, I got a text from my bank saying I had overdrafted to pay for the gas to get to the exam. No money. No experience. No idea what the home-buying process looked like. No hope, it seemed.

THE TURNING POINT

How I stopped playing “Random Real Estate.”

Luckily, I am not scared off easily. I decided to give real estate everything and prove every doubter wrong. I buried myself in books, attended every seminar I could find, watched hours of training footage, and practiced my dialogue endlessly. I was the guy in the conference rooms at midnight, talking to an empty chair, practicing my prospecting scripts. Yes, I was that guy.

I sold houses very quickly in those early years, but purely off effort. I had no system. The turning point came when a top producer noticed my work ethic and asked me to partner with her. After years of personal coaching, 40+ transactions a year, and interviewing top agents inside and outside our company, I figured something out.

Everything the “gurus” were telling new agents was wrong. You don’t need a sales background. You don’t need a huge savings account. You don’t need a marketing degree. You need to master seven steps.

WHAT THIS PROCESS PRODUCES

“My early success is a direct result of the mentorship and coaching I’ve been receiving from Jacob, since day one.”

With Jacob’s coaching, in only six months in the business I closed two transactions, had four escrows open, one active listing, and two more listings hitting the market soon.

LINDSEY I.

Brand-new agent, now running a successful team of 6+ agents.

THE 7 STEPS

Proven by every top producer I interviewed.

I am not claiming to have invented the seven steps you are about to read. I uncovered them by interviewing dozens of the top agents in our company, outside our company, and across Southern California, asking each of them the same question: What did you do when you started? Not what they do now with a \$15,000-per-month marketing budget, but what built the business in the first place. The same seven steps came up over and over again.

- 01 Get Licensed *(the right way)*
- 02 Choose a Company *(and what to actually ask)*
- 03 Learn the Benchmarks

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- 04 Build Your Business System
 - 05 Start
 - 06 Generate Business *(Marketing, Prospecting, AI)*
 - 07 Convert That Business

STEP 01

Get Licensed.

Groundbreaking, right? It seems obvious, but a surprising number of prospective agents don't know exactly how to get licensed in California. There are plenty of online programs, schools, and training centers happy to take your money. As long as they're accredited, they're generally fine. Just know this: the schooling to get your license does not prepare you for how to actually sell houses after you have it.

THE LICENSING PROCESS IN PLAIN ENGLISH

- Be at least 18 years of age.
- Pass three college-level courses (Real Estate Principles, Practice, and an Elective).
- Pass a Live-Scan background check.
- Submit your application to the DRE.
- Take a "Crash Course." Not required, but very, VERY important.
- Pass the State Licensing Exam.

From registering for classes to receiving your license, the process generally takes 4 to 7 months, but it can be greatly expedited by submitting what's called a "Combination Application" for your exam. If you have questions about getting your California real estate license, the fastest path is to text or email me directly. I help new candidates through this process every month.

Already licensed? Skip ahead. Step 2 is where it gets interesting for you.

STEP 02

Choose a Company.

Choosing where to hang your license is one of the most important decisions you will make, and most new agents make it for the wrong reasons. Yes, I run a brokerage. I am biased. But the principle I'm about to share is true regardless of where you ultimately land.

The company you begin with will mold you in their image. Their training. Their mentorship. Their philosophies. Their habits. You already know from past experience that it is much easier to learn something new than it is to unlearn poor habits later. Most new agents don't know the difference between real estate companies, just like most consumers don't know the difference between agents.

QUESTIONS WORTH ACTUALLY ASKING

- What formal training does your company provide, and who teaches it?
- What support continues after formal training ends?
- Do you have a mentorship program, or is "mentorship" just a word on the website?
- How will you actually help me generate leads in my first 90 days?
- What tools does the company give me to convert those leads into clients?
- (My favorite) What is the benefit to my clients for me to be with your company?

You'll notice I didn't list compensation, splits, caps, or fees. Here's why: in the beginning, your main need is a company that will train you and help you find your first deals. Too many new agents pick a company based on which split looks highest on paper. Keeping 100% of zero is still zero. Lay the foundation first; the math takes care of itself when the system works.

If you were getting brain surgery, would you choose your surgeon based on who was cheapest? Of course not. You'd ask about success rates, training, and outcomes. Choosing a brokerage isn't life-or-death, but it is for the life of your business.

When I joined First Team, I told my first manager: "If I ever find a company that is better for my clients for me to be a part of, I'm gone." That's a true story. I meant it. And I'm still here.

STEP 03

Learn the Benchmarks.

Until you know what to focus on, what I call the Benchmarks, real estate feels like a random event. When I was interviewing brokerages, one manager told me to make sure I had a good credit card because real estate is a random, unpredictable business. He obviously never learned the Benchmarks.

BENCHMARK 01

What do real estate agents actually do?

We find a buyer who wants to buy, find a seller who wants to sell, and we bring them together. Most “gurus” love to complicate it, but that is the entire job. The trick is building a system to do this on a consistent basis.

BENCHMARK 02

What do real estate agents need to know?

Two things: what you are selling, and how to sell it. Product Knowledge and Contract Knowledge.

Product Knowledge is the combination of statistical market data and an intimate knowledge of emotional property. Market data is the foundation, but the money is made by knowing the homes themselves. That is done through Previewing: physically going inside houses to understand each one. Most agents “preview” by scrolling the MLS. The #1 rule of sales is know more than the consumer. Your future clients have spent hours online before they call you. They deserve more than what they could already find themselves.

Contract Knowledge is more straightforward: you must know the contracts involved in a transaction. In California, the main one is the Residential Purchase Agreement (the RPA). It governs every transaction, and it happens to be the most litigated contract in real estate. Knowing the RPA forward and backward is how you stop being afraid to talk to people.

BENCHMARK 03

What does “work” actually look like?

My first mentor told me something that stuck with me my entire career: “The only definition of work in this business is talking to people about real estate.” I didn’t fully understand it until I started training agents. Agents would tell me they were working 40+ hours per week with no results. I’d ask how many of those hours were spent actually talking to people, and the honest answer was usually 2 to 3. I’d correct them: “Then you are working 2 to 3 hours per week.”

You can fill a real-estate schedule with activities that feel productive but produce zero income. Perfecting your listing presentation, organizing your CRM, redesigning your buyer packet. All important, but all preparation. Reserve the majority of your day for the actual work: talking to people.

Long story short: to have massive results, talk to a massive number of people.

STEP 04

Build Your Business System.

Most people jump into a real-estate career with no idea they are starting a small business. Even the ones who do realize it usually don't know how to run one. Improper management of finances and time is one of the biggest reasons new agents fail in their first two years, and the cause underneath it is the same: no system, no way to predict income.

Without a system, you are playing the game I call Random Real Estate. A game of frustration, debt, and anxiety. I lived in that game. I would not wish it on my worst enemy.

Our offices have a proven system that is handed to you on the first day of formalized training. It is called Power Curve. It was developed by top agents in the company and refined over years of changing markets. It is the same system the top producers in our office use today, and the same system that turns brand-new agents into new top producers.

POWER CURVE, AT A GLANCE

- **Week 01, Foundations.** Contracts, market data, scripts, and the daily routine of a producing agent.
- **Week 02, Buyers.** How to win buyer consultations, write strong offers, and convert open-house traffic.
- **Week 03, Sellers.** Listing presentations, pricing strategy, and the language that wins listings in any market.

Once you join one of our offices, the system is yours. We'll teach you the ins and the outs. See you in Power Curve.

STEP 05

Start.

That's right, start. It sounds like common sense, but it is not common practice. Most new agents have an extremely difficult time actually implementing the system they were just handed. The temptation is to put off the real work of real estate (talking to people) in favor of organizing, researching, redesigning a logo, or any other excuse not to go and meet people.

Most new agents want to know how long it will take to become successful. The honest answer: it depends on how long it takes you to actually start.

Everyone is nervous to begin something new. It is human nature to look at top producers and feel intimidated by their logos, their marketing, their websites, their moving vans, their presentations, and then convince ourselves we can't start meeting people until we have all of that, too. None of those agents began with any of it. They acquired it along the way.

Doubt kills more dreams than failure ever could, and nowhere is that more true than for a new agent in real estate.

Some new agents get stuck in paralysis by analysis. They won't begin until everything is perfect. Let me save you the trouble: there is no such thing as perfect. In our offices, we help you walk through the fear instead of waiting it out. Start.

STEP 06

Generate Business.

The reason most small businesses fail in their first two years is simple: lack of business. The same is true for new agents. Your main focus, from day one, is lead generation. There are thousands of methods, but they fall into three buckets: Marketing, Prospecting, and (now) AI-assisted outreach.

MARKETING

Marketing is the long game. It puts your name into the marketplace and builds a brand. The brand is what eventually produces come-list-me calls, where a homeowner reaches out unprompted because they already trust you. Common methods include neighborhood farming, SEO, social media ads, personal websites, YouTube content, monthly newsletters, and paid placement on portals like Zillow and Realtor.com. Marketing is essential, but it usually takes time to produce returns.

PROSPECTING

Prospecting is the short game. It is real estate lead generation at its core. The agent going into the marketplace and meeting people. Open houses, door knocking, cold calling, warm calling, expired listings, networking groups, community events. For a new agent, prospecting is non-negotiable because it produces faster results. Statistically, the first transactions for new agents come from open houses or their sphere of influence: people who already knew and trusted them.

AI & THE MODERN AGENT

The biggest change in this business since I started is the rise of AI tools that can compress hours of work into minutes. Used correctly, they make a new agent look and operate like a 10-year veteran. In our offices, we train agents to use tools like ChatGPT, Claude, and Gemini Pro to draft listing descriptions, research neighborhoods, analyze comps, summarize disclosures, and prep for buyer and seller consultations. AI does not replace the work. It amplifies it. The agents who learn to use it now will run circles around the agents who don't.

STEP 07

Convert That Business.

You found a lead. Great. Now what? That is the inner conversation every new agent has the moment they generate their first one. Exciting, and nerve-wracking. Excited that you have a lead. Anxious that they won't buy, or worse, that they will, but through someone else.

Lead conversion is delicate, and it is one of the biggest separators between successful and unsuccessful agents. Conversion actually has to happen twice with every client:

- **First conversion:** convert them to working with you.
- **Second conversion:** convert them on the actual transaction. For buyers, on the house. For sellers, on an offer.

Everyone is afraid of doing the “wrong” thing with a lead, and that fear is the source of most new-agent anxiety. In our offices, you get a step-by-step process for both conversions, plus the conversion tools to use along the way.

My first mentor told me, “Success in real estate is a function of Effort vs. Skill.” In the beginning your skill is low, so you make up the difference with effort. There is no shortcut. You will lose some early leads. That is part of the apprenticeship. Training prepares you as much as possible, but just like you can't learn to ride a bike from a book, you can't learn to sell real estate purely from training.

The true secret of real-estate success is in the words of one of my favorite agents, Philip DeMatteo: “Never be without an escrow.” He happens to be a \$100,000,000+ producer. I'd follow his advice.

NEW FOR 2026

The Modern AI Leverage Layer.

Real estate has always rewarded the agent who could combine skill, speed, consistency, and trust. AI does not change that. It simply raises the standard for how quickly and professionally a serious agent can operate.

I do not teach AI as a replacement for the work. AI will not build relationships for you. AI will not sit at an open house for you. AI will not call your sphere, ask the uncomfortable follow-up question, negotiate an emotional repair request, or earn the trust of a seller across the kitchen table. That is still your job.

But AI can help you show up prepared. It can help you create content faster, write better follow-up, analyze market data, prep for listing appointments, brainstorm stronger questions, summarize complex information, and stay visible with your database. Used correctly, AI is not a shortcut around the fundamentals. It is leverage on top of the fundamentals.

The danger is that many new agents will use AI to hide. They will spend hours making graphics, rewriting captions, and playing with prompts while avoiding the real work of talking to people about real estate. That is not leverage. That is procrastination in a nicer outfit.

The goal is not to become an “AI agent.” The goal is to become a better real estate agent who uses AI to operate faster, more consistently, and more professionally. Proven principles first. Modern tools second. That combination is where the opportunity is.

HOW AI SHOULD HELP A NEW AGENT

Practical ways to use AI without losing sight of the work that actually creates business.

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- Write a professional bio, launch announcement, and sphere message without sounding brand new or awkward.
 - Turn local market data into simple explanations a consumer can actually understand.
 - Prepare stronger open house talking points and follow-up messages before and after the event.
 - Draft buyer consultation notes, seller prep questions, and appointment agendas.
 - Create a 30-day social content plan that supports real conversations instead of random posting.
 - Summarize contracts, disclosures, and training notes for study purposes, while still learning the documents directly.
 - Role-play objections, pricing conversations, buyer consultation dialogue, and follow-up calls.

AI is at its best when it helps you prepare faster, communicate clearer, and implement more consistently. It is at its worst when it becomes another place to hide from rejection.

As a new agent, remember this: the agent who knows the contracts, knows the market, talks to people every day, follows up consistently, and uses AI to sharpen the edges will have a major advantage over the agent who only uses AI to create prettier posts.

THE NEW BENCHMARK

Timeless principles + modern tools.

The fundamentals have not changed. You still need Contract Knowledge. You still need Product Knowledge. You still need Sales Skills. You still need a Business System. You still need to START. You still need to get business and convert that business.

AI sits across the top of those fundamentals. It can make the prepared agent more prepared. It can make the consistent agent more consistent. It can make the strategic agent more strategic. But it cannot make the unwilling agent productive.

Long story short: use AI to do more of the right work, not to avoid the work.

BEYOND THE 7 STEPS

Three quick tips for real estate success.

The question I get asked most often is the same: what is the difference between successful agents and those who are not? If you've made it this far in the e-book, I look at you as a brother or sister in arms. Here are three.

TIP 01

Guard your energy.

This business is built on energy. It is a business of extremes. You can make tens of thousands of dollars in a day by opening an escrow, and you can "lose" tens of thousands when one falls apart. (I use quote marks because you don't actually lose the money, but the emotional loss is real.) One of the hardest disciplines in this career is staying emotionally neutral toward any one deal. It's necessary if you're going to keep your clients' interests above your own.

TIP 02

Confidence is key.

A lack of confidence is the single biggest killer of new-agent business. Some agents leave the industry before ever truly beginning. Remember: the only definition of work in this business is talking to people about real estate. The easiest way to build the confidence to do that consistently is to master the two things that matter most: Product Knowledge and Contract Knowledge.

TIP 03

Master your time.

In the words of New York Times bestselling author Tim Ferriss, "A lack of time is a lack of priorities." Most new agents time-block too many things and not enough of the right ones. Real-estate time management is different from any other industry because our schedule fluctuates so often, so plan accordingly. Time-block your money-making activities first. In the beginning, that is lead generation. Put your faith in the process, not the person. Do not sacrifice your prospecting block for any one client. Schedule people around your prospecting, not the other way around. Do this and you'll have an abundance of business.

WHAT'S NEXT

You've made it to the end of the e-book.

What happens next depends on where you are in the journey.

If you haven't signed up for licensing classes yet: that's your first step. Text or email me. I'll point you to the fastest, least-painful path to your California license. I help new candidates through this every month and it costs you nothing to ask.

If you're already in classes or already licensed: the next step is a conversation. Not a sales pitch. A real conversation about your goals, what you're afraid of, and whether what we do in our offices is the right fit for you. If it is, you'll know. If it isn't, you'll leave with clarity about what to look for elsewhere.

This isn't the brokerage for everyone. I personally onboard only three to five new agents per month, and the discovery session is how we both find out if it's a match.

READY FOR THE CONVERSATION?

Book a discovery session, or reach out directly. If we're a fit, we can have you up and running within 24 hours.

E M A I L jacoblawlor@firstteam.com

C E L L 949-201-0899 (text is fine)

W E B new.jacoblawlor.com

In the words of my first mentor: "Onward & Upward."

T O Y O U R S U C C E S S ,

Jacob Lawlor

Regional Branch Manager · First Team Real Estate

Mission Viejo + San Clemente Offices · 27451 Los Altos, Suite 100, Mission Viejo, CA 92691

DRE #01899247 · First Team DRE #01008773