A comprehensive guide
(in how to become a successful eXp agent)

Joining eXp as an independent estate agent is not just taking a job. You are starting your own estate agency business, but with the backing, systems, training, brand, compliance support and network of eXp behind you.

That is exciting, but it also means you need to think like a business owner from day one.

Your job is not simply to “sell houses”. Your job is to:

- Generate leads
- Build trust locally
- Win valuation appointments
- Convert those appointments into instructions
- Launch properties properly
- Negotiate offers
- Progress sales through to completion
- Create repeat business, referrals and a strong local reputation

This guide walks you through what to do, step by step.

1. Understand Your Role

As an independent estate agent, you are responsible for building your own business.

You are not waiting for a branch manager to hand you leads. You are not relying on passing footfall. You are not sitting behind a desk hoping the phone rings.

You are the business.

Your main responsibilities are:

1. Finding people who may want to sell.
2. Building relationships before they need you.
3. Valuing homes accurately.
4. Winning instructions.
5. Marketing properties professionally.
6. Communicating with sellers, buyers, solicitors and other agents.
7. Negotiating the best possible deal.
8. Progressing sales until completion.
9. Staying compliant.
10. Building a long-term personal brand.

The best agents are not just good salespeople. They are trusted advisors, problem solvers, local experts and calm voices during stressful moments.

2. Complete Your eXp Onboarding First

Before you start prospecting properly, make sure your eXp foundation is complete.

Your first tasks are:

- Complete all eXp onboarding steps.
- Set up your eXp email.
- Set up your eXp profile.
- Understand which eXp systems you must use.
- Complete any required compliance training.
- Learn how to access eXp support.
- Understand the listing process.
- Understand the sales progression process.
- Understand who to contact for admin, compliance, marketing, conveyancing, finance or technical help.

eXp UK provides training and launch resources for agents, including foundation courses for tools, compliance, productivity and business growth. (eXp University)

Do not skip this stage. A messy setup will cost you later.

3. Set Up Your Business Identity

Even though you are part of eXp, people will often choose you personally.

You need to be clear on:

- Who you serve.
- Where you operate.
- What type of property you focus on.
- Why someone should choose you.
- What makes your service different.

Create a simple positioning statement:

“I help homeowners in [area] sell their property with honest advice, strong marketing, clear communication and expert negotiation.”

Do not try to sound clever. Try to sound clear.

Your business identity should include:

- Your name.
- Your eXp association.
- Your local area.
- A professional headshot.
- A short personal bio.
- A clear explanation of how you help sellers.
- Consistent branding across LinkedIn, Facebook, Instagram, WhatsApp and email.

4. Know Your Area Properly

You must become a genuine local expert.

Start by studying:

- Recent sold prices.

- Current listings.
- Properties reduced in price.
- Properties stuck on the market.
- Average price per square foot.
- School catchments.
- Transport links.
- Popular roads.
- Local amenities.
- New developments.
- Council plans.
- Rental demand.
- Buyer demographics.
- Typical seller motivations.

Every week, review:

- What has come to market.
- What has sold.
- What has reduced.
- What has fallen through.
- Which agents are most active.
- Which properties are overpriced.
- Which homes generated strong interest.

You should eventually know your patch so well that you can speak confidently without opening a laptop.

5. Get Your Compliance Right

This is not optional.

Estate agency is regulated, and compliance mistakes can be expensive and damaging.

You need to understand:

- Anti-money laundering checks.
- Client identity verification.
- Proof of ownership.
- Material information.
- Consumer protection rules.
- Data protection.
- Property descriptions.
- Referral fee disclosure.
- Offers handling.
- Complaints procedure.
- Record keeping.

Propertymark states that it is a criminal offence to trade as an estate agency or letting agency business handling high-value transactions without being registered with HMRC for money laundering supervision. (Propertymark)

You must also understand material information. Important information about a property must be provided when the property is marketed, not discovered halfway through the transaction. (UK Parliament Committees)

Before listing any property, make sure you have:

- Seller ID checks.
- Proof of ownership.
- AML checks completed.
- Signed terms of business.
- Property information collected.
- EPC ordered or available.
- Accurate property details.
- Correct tenure information.
- Council tax band.
- Service charge and ground rent details, if leasehold.
- Known restrictions, rights of way or planning issues.
- Any referral relationships disclosed.

When unsure, ask eXp compliance before acting.

6. Build Your Core Business Tools

You need a simple operating system.

Set up:

- CRM/database.
- Email signature.
- WhatsApp Business.
- Calendar booking link.
- Valuation presentation.
- Market appraisal template.
- Follow-up email templates.
- Seller nurture sequence.
- Buyer registration process.
- Viewing feedback process.
- Offer confirmation process.
- Sales progression tracker.
- Social media profiles.
- Google Business Profile, if appropriate.
- Local content plan.

Your database is one of your most valuable assets.

Every person you speak to should be recorded with:

- Name.
- Address.
- Phone number.
- Email.
- Relationship to property.
- Timescale.
- Motivation.
- Property details.
- Follow-up date.
- Notes from conversation.

Poor agents rely on memory. Professional agents rely on systems.

7. Define Your Patch

Do not try to cover everywhere.

Choose a focused area where you can become visible quickly.

Start with:

- 500 to 1,000 homes.
- A few target streets.
- A clear price band.
- A manageable geography.
- An area you can visit regularly.

Your goal is to become known in that area.

You want people to think:

“That’s the agent who really understands this patch.”

Create a spreadsheet of target homes and streets. Track:

- Address.
- Property type.
- Estimated value.
- Last sold date.
- Owner name, where known legally and appropriately.
- Current status.
- Contact history.
- Follow-up date.

8. Build Your First 100 Relationships

Your first target is not to list 100 homes.

Your first target is to create 100 meaningful local relationships.

Start with:

- Friends.
- Family.
- Former colleagues.
- Local business owners.
- Parents from school.
- Sports clubs.
- Community groups.
- Neighbours.
- Tradespeople.
- Mortgage brokers.
- Solicitors.
- Landlords.

- Developers.
- Investors.
- Past buyers or sellers, if applicable.

Tell them what you are doing clearly:

“I’ve launched as an independent estate agent with eXp, focusing on helping local homeowners sell with better communication, stronger marketing and a more personal service. If you hear of anyone thinking of moving, I’d really appreciate an introduction.”

Do not beg for business. Ask for conversations and introductions.

9. Create Your Daily Prospecting Routine

Lead generation is the heartbeat of your business.

Every working day, aim to complete:

- 10 new conversations.
- 5 follow-ups.
- 5 local property comments or messages.
- 1 useful social media post.
- 1 local market observation.
- 1 handwritten note, voice note or personal message.

Prospecting channels include:

- Phone calls.
- Door knocking.
- Local letters.
- WhatsApp.
- LinkedIn.
- Facebook groups.
- Instagram.
- Local events.
- Referral partners.
- Expired listings.
- Withdrawn properties.
- For sale by owner opportunities.
- Landlords.
- Probate contacts, handled sensitively.
- Downsizers.
- Upsizers.
- Investors.

The mistake most new agents make is doing prospecting only when they feel quiet.

Prospecting is not something you do when you have no business. Prospecting is the reason you get business.

10. Learn How to Win Valuations

A valuation appointment is not just about naming a price.

It is your chance to build trust.

Before the appointment, research:

- The property.
- The street.
- Previous sale history.
- Comparable sold prices.
- Current competition.
- Similar properties under offer.
- Market conditions.
- Likely buyer profile.
- Seller motivation.

At the appointment, ask good questions:

- Why are you thinking of moving?
- Where are you hoping to go?
- What is your ideal timescale?
- Have you had any valuations already?
- What is most important to you: price, speed, certainty, privacy or convenience?
- What would make this a successful move for you?
- Are there any issues with the property I should know about?
- Is there an outstanding mortgage?
- Are all owners in agreement?
- Have you found somewhere to buy?

Listen more than you speak.

A good valuation appointment should cover:

- Seller motivation.
- Property condition.
- Local comparable evidence.
- Pricing strategy.
- Marketing plan.
- Viewing strategy.
- Negotiation approach.
- Fees.
- Contract terms.
- Next steps.

11. Price Property Properly

Pricing is one of your most important skills.

Do not simply tell sellers what they want to hear.

Your pricing advice should be based on:

- Comparable sold properties.
- Current competition.
- Market demand.
- Property condition.
- Location.

- Unique features.
- Buyer affordability.
- Mortgage conditions.
- Local supply levels.
- Seller timescale.

Explain pricing in three levels:

1. **Conservative price** — designed for strong interest and faster sale.
2. **Market price** — realistic, evidence-based and competitive.
3. **Aspirational price** — possible, but may take longer and needs careful review.

Be honest.

An overpriced listing may feel like a win on day one, but it becomes a problem after six weeks with no viewings, no offers and an unhappy seller.

12. Build a Strong Listing Presentation

Your listing presentation should explain why the seller should trust you.

Include:

- Who you are.
- Why you work with eXp.
- Your local market knowledge.
- Recent comparable evidence.
- Your pricing recommendation.
- Your marketing strategy.
- Photography and video plan.
- Portal strategy.
- Social media plan.
- Buyer database approach.
- Viewing strategy.
- Negotiation plan.
- Communication promise.
- Fee structure.
- Next steps.

Your presentation should feel professional but personal.

Do not drown sellers in slides. Show them you understand their move.

13. Prepare Every Property Properly Before Launch

A property launch should not be rushed.

Before going live:

- Confirm signed terms.
- Complete AML checks.
- Gather material information.
- Check EPC status.
- Arrange photography.

- Prepare floorplan.
- Write property description.
- Confirm fixtures and fittings.
- Check tenure details.
- Agree guide price.
- Agree launch date.
- Prepare social media assets.
- Prepare buyer match list.
- Agree viewing arrangements.
- Confirm seller communication schedule.

Presentation matters.

Advise sellers on:

- Decluttering.
- Cleaning.
- Kerb appeal.
- Lighting.
- Minor repairs.
- Garden presentation.
- Neutral styling.
- Removing distractions.
- Making rooms easy to understand.

You are not just listing a property. You are launching a product into the market.

14. Write Property Details That Sell Honestly

Your property description should be accurate, clear and appealing.

Avoid lazy phrases like:

- “Must be seen.”
- “Rarely available.”
- “Deceptively spacious.”
- “Viewing highly recommended.”

Instead, describe what matters:

- Layout.
- Natural light.
- Room flow.
- Garden direction.
- Storage.
- Parking.
- Extension potential, only if appropriate.
- Local schools.
- Transport.
- Lifestyle benefits.
- Who the home may suit.

Always be truthful. Never exaggerate, hide key facts or make claims you cannot support.

15. Manage Enquiries Quickly

Speed matters.

When a buyer enquiry comes in, respond quickly and professionally.

Ask:

- Are you currently looking to buy?
- Do you have a property to sell?
- Is your property on the market?
- Do you have a mortgage agreement in principle?
- Are you a cash buyer?
- What is your budget?
- What areas are you considering?
- What is your timescale?
- Have you viewed anything similar?
- Would you like to book a viewing?

Every buyer enquiry is also a possible seller lead.

Someone viewing today may need to sell tomorrow.

16. Conduct Viewings Professionally

Before a viewing:

- Know the property.
- Know the buyer.
- Confirm their position.
- Arrive early.
- Check lights, heating and access.
- Make sure the property looks ready.

During the viewing:

- Welcome the buyer.
- Let the property breathe.
- Do not talk constantly.
- Point out key features.
- Ask thoughtful questions.
- Listen for buying signals.
- Understand objections.
- Give honest answers.

After the viewing:

- Ask for feedback.
- Record notes in your CRM.
- Update the seller.
- Follow up with the buyer.
- Suggest next steps.
- Ask whether they have a property to sell.

A viewing is not a tour. It is a conversation.

17. Handle Offers Correctly

When an offer comes in, gather full information.

Record:

- Offer amount.
- Buyer name.
- Buying position.
- Proof of funds.
- Mortgage status.
- Chain details.
- Timescale.
- Solicitor details.
- Conditions of offer.
- Fixtures or extras requested.
- Whether they need a survey.
- Any special requirements.

All offers should be reported to the seller promptly and accurately.

Your job is not just to pass messages between buyer and seller. Your job is to advise.

Explain:

- Strength of buyer.
- Risk level.
- Chain position.
- Likelihood of completion.
- Possible negotiation strategy.
- Whether to accept, reject or counter.

The best offer is not always the highest offer. It is the offer most likely to complete at the best overall terms.

18. Negotiate Like a Professional

Good negotiation is calm, prepared and evidence-based.

Do not bully. Do not bluff wildly. Do not panic.

Use:

- Comparable evidence.
- Buyer motivation.
- Seller timescale.
- Competition.
- Demand levels.
- Chain strength.
- Market conditions.

Your aim is to create agreement while protecting your client's position.

Useful questions include:

- "Is that your best offer?"
- "If we could agree this today, are you ready to proceed?"

- “What would need to happen for you to improve that offer?”
- “Can you confirm your position in writing?”
- “Are there any conditions attached to that figure?”

Always keep notes.

19. Progress the Sale Relentlessly

Once a sale is agreed, the real work begins.

Sales progression is where many deals survive or die.

Immediately after sale agreed:

- Confirm buyer ID and funding.
- Confirm solicitors for both sides.
- Issue memorandum of sale.
- Confirm chain details.
- Check mortgage application status.
- Check survey booking.
- Keep seller updated.
- Keep buyer warm.
- Monitor solicitor progress.
- Chase outstanding paperwork.
- Track searches.
- Track enquiries.
- Watch for delays.
- Keep communication moving.

Create a weekly sales progression checklist for every deal.

Track:

- Mortgage applied.
- Valuation booked.
- Survey completed.
- Draft contracts issued.
- Searches ordered.
- Enquiries raised.
- Enquiries answered.
- Mortgage offer received.
- Deposit confirmed.
- Exchange target date.
- Completion target date.

Never assume “the solicitors are dealing with it”.

Follow up, politely and persistently.

20. Build Your Personal Brand

People instruct agents they trust.

Your personal brand should show:

- Local knowledge.
- Honesty.
- Competence.
- Warmth.
- Consistency.
- Results.
- Human personality.

Post content such as:

- Local market updates.
- “Property of the week” style posts.
- Seller tips.
- Buyer tips.
- Behind-the-scenes stories.
- Local business spotlights.
- Moving advice.
- Lessons from deals.
- Short videos explaining common questions.
- Sold stories.
- Case studies.
- Community updates.

Do not make every post a sales pitch.

A useful ratio:

- 60% helpful advice.
- 20% local/community content.
- 10% personal/story-led content.
- 10% direct business promotion.

21. Create a Weekly Content Plan

Example weekly plan:

Monday: Local market update
Tuesday: Seller advice post
Wednesday: Buyer tip or myth-busting video
Thursday: Local community/business spotlight
Friday: Property insight or case study
Saturday: Personal/local lifestyle post
Sunday: Weekly reflection or market summary

Content ideas:

- “Three things sellers should do before inviting agents round.”
- “Why the highest valuation is not always the best valuation.”
- “What buyers notice in the first 30 seconds.”
- “What actually happens after an offer is accepted.”
- “Why some homes sell quickly and others sit online.”
- “How to choose the right asking price.”
- “What I’d do if I were selling in this market.”

22. Build Referral Relationships

Referral partners can become a major source of business.

Build relationships with:

- Mortgage brokers.
- Solicitors.
- Surveyors.
- Builders.
- Developers.
- Interior designers.
- Removal firms.
- Accountants.
- Financial advisers.
- Landlords.
- Local business owners.

Your aim is not to “take”. Your aim is to create mutual value.

Meet people. Understand their business. Refer when appropriate. Stay visible.

Always disclose referral arrangements where required.

23. Master Follow-Up

Most business is won in the follow-up.

You need follow-up sequences for:

- Valuation completed but not instructed.
- Seller thinking of moving in 3 months.
- Seller thinking of moving in 6-12 months.
- Buyer who viewed but did not offer.
- Buyer who missed out on a property.
- Landlord considering selling.
- Past client.
- Local contact.
- Referral partner.

Example follow-up schedule after a valuation:

- Same day: thank-you message.
- Day 2: useful market evidence.
- Day 5: check-in call.
- Day 10: send relevant buyer/property update.
- Day 21: market update.
- Monthly: local property report.
- Quarterly: personal call.

Do not disappear after the valuation. That is where many agents lose.

24. Track Your Numbers

You cannot improve what you do not measure.

Track weekly:

- New contacts added.
- Calls made.
- Conversations held.
- Follow-ups completed.
- Valuations booked.
- Valuations attended.
- Instructions won.
- Listings launched.
- Viewings booked.
- Offers received.
- Sales agreed.
- Exchanges.
- Completions.
- Fee income.
- Referral sources.

Useful conversion measures:

- Conversations to valuations.
- Valuations to instructions.
- Instructions to sales agreed.
- Sales agreed to exchanged.
- Average fee.
- Average time to sale.

This turns your business from guesswork into a machine.

25. Your First 30 Days

Your first month is about foundations and visibility.

Week 1: Setup

- Complete eXp onboarding.
- Complete compliance training.
- Set up email, CRM and calendar.
- Create your agent profile.
- Write your personal bio.
- Set up social profiles.
- Define your patch.
- Build your target street list.
- Create your first 100-contact database.
- Prepare your valuation template.
- Prepare your follow-up templates.
- Speak to your mentor/upline/support contact.

Week 2: Market Knowledge

- Study sold prices in your area.
- Review all current listings.

- Identify overpriced properties.
- Identify active agents.
- Visit your patch.
- Create a local market report.
- Post your first market update.
- Contact 25 people from your network.
- Arrange coffee with 3 local referral partners.
- Practise your valuation presentation.

Week 3: Prospecting

- Make 50 local conversations.
- Send 50 personal messages.
- Post 5 pieces of useful content.
- Door knock or leaflet target streets.
- Contact withdrawn/expired listings where appropriate.
- Speak to landlords and investors.
- Ask your network for introductions.
- Book your first valuation appointments.
- Keep detailed CRM notes.

Week 4: Appointments and Momentum

- Attend valuations.
- Follow up all prospects.
- Refine your pitch.
- Create a seller guide.
- Build your buyer database.
- Strengthen referral relationships.
- Review your weekly numbers.
- Identify what generated conversations.
- Plan your next 30 days.

26. Your First 90 Days

By the end of 90 days, aim to have:

- 300+ local contacts in your database.
- A defined patch.
- A consistent content rhythm.
- 10+ referral relationships.
- Regular valuation appointments.
- A clear listing presentation.
- A working CRM.
- A follow-up system.
- Strong knowledge of local prices.
- At least one instruction, ideally more.
- A pipeline of future sellers.

Your first 90 days are about momentum, not perfection.

27. Daily To-Do List

Every day:

1. Check emails and urgent messages.
2. Review active buyers, sellers and sales.
3. Make prospecting calls.
4. Send follow-up messages.
5. Add new contacts to CRM.
6. Post or engage on social media.
7. Study local market changes.
8. Contact referral partners.
9. Progress existing deals.
10. Plan tomorrow before finishing.

Minimum daily activity:

- 10 conversations.
- 5 follow-ups.
- 1 social post or video.
- 1 market insight.
- 1 referral-building action.

28. Weekly To-Do List

Every week:

1. Review local new listings.
2. Review sold subject to contract properties.
3. Review price reductions.
4. Update your market knowledge.
5. Publish a local market update.
6. Contact your seller prospects.
7. Contact your buyer database.
8. Speak to referral partners.
9. Review your CRM.
10. Track your numbers.
11. Practise your valuation presentation.
12. Review active sales.
13. Plan next week's prospecting.
14. Improve one business asset.

29. Monthly To-Do List

Every month:

1. Review income pipeline.
2. Review lead sources.
3. Review conversion rates.
4. Update your target street list.
5. Refresh your content plan.
6. Send a monthly market update.
7. Reconnect with past contacts.
8. Meet referral partners.
9. Update your seller guide.
10. Review compliance records.
11. Audit your CRM.

12. Set goals for the next month.

30. What to Say When People Ask What You Do

Keep it simple.

“I’m an independent estate agent with eXp. I help local homeowners sell their property with a more personal, proactive service — strong marketing, honest advice and proper communication from start to finish.”

Or:

“I help people in [area] understand the value of their home and make smart decisions about moving, whether they’re ready now or just planning ahead.”

The aim is to open a conversation, not deliver a speech.

31. Common Mistakes to Avoid

Avoid these:

- Waiting for leads.
- Trying to cover too wide an area.
- Overpricing to win instructions.
- Failing to follow up.
- Not using a CRM.
- Posting only “just listed” content.
- Ignoring compliance.
- Poor communication after sale agreed.
- Not asking for referrals.
- Being afraid to call people.
- Sounding like every other agent.
- Letting quiet weeks damage your confidence.

The biggest mistake is inconsistency.

Estate agency rewards the agent who keeps showing up.

32. The Mindset You Need

You are building a business.

That means some days will feel slow. Some calls will go nowhere. Some sellers will choose another agent. Some deals will fall through.

That is normal.

The professional agent does not rely on mood. They rely on routine.

Your job is to:

- Stay visible.

- Stay useful.
- Stay in touch.
- Stay honest.
- Stay organised.
- Stay consistent.

You are not trying to become famous overnight. You are trying to become trusted, one conversation at a time.

33. Simple First-Year Business Targets

A realistic first-year focus:

- Build a database of 1,000 contacts.
- Create 50+ meaningful seller conversations per month.
- Attend regular valuation appointments.
- Build 20 referral relationships.
- Post useful content consistently.
- Win instructions through trust and follow-up.
- Improve conversion every quarter.
- Create a reputation for communication and professionalism.

You do not need to be everywhere.

You need to be consistently present in the right places.

34. Final Checklist Before You Launch Publicly

Before fully announcing your business, make sure you have:

- eXp onboarding complete.
- Compliance training complete.
- CRM set up.
- Email signature ready.
- Social profiles updated.
- Professional photo.
- Personal bio.
- Clear service message.
- Defined patch.
- Target contact list.
- Valuation presentation.
- Follow-up templates.
- Seller guide.
- Local market knowledge.
- First 30-day prospecting plan.
- Support contacts saved.
- Confidence to start conversations.

Then launch.

Do not wait until everything is perfect.

Start talking to people.

Your Immediate Action Plan

Today:

1. Finish your eXp setup.
2. Define your local patch.
3. Create your first 100-contact list.
4. Write your simple introduction message.
5. Contact 10 people.
6. Study 10 recent sales in your area.
7. Post your launch announcement.
8. Book one meeting with a referral partner.
9. Set up your CRM.
10. Plan tomorrow’s prospecting.

This week:

1. Complete all onboarding and compliance.
2. Contact 50 people.
3. Create your local market report.
4. Post 3 useful pieces of content.
5. Speak to 3 referral partners.
6. Practise your valuation presentation.
7. Walk or drive your patch.
8. Identify 20 target streets.
9. Add every contact to your CRM.
10. Book your first valuation opportunity.

This month:

1. Build 300 contacts.
2. Have 100 conversations.
3. Publish weekly market updates.
4. Book valuation appointments.
5. Build referral partnerships.
6. Learn your patch deeply.
7. Create a consistent daily routine.
8. Review your numbers every Friday.
9. Improve your presentation.
10. Keep going.

The agent who wins is rarely the loudest.