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# Real Estate Training Playbook

*May & June 2026*



[higginsgroup.com](https://higginsgroup.com)



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## Welcome to the Higgins Group: Your Roadmap to Excellence

Congratulations on joining the Higgins Group. Whether you are a newly licensed agent or a seasoned professional looking to refine your craft, this training manual is designed to be your definitive guide to building a thriving, sustainable real estate career in today's competitive market.

At the Higgins Group, we believe that success is not a matter of luck; it is a result of mastering the fundamentals, leveraging the right tools, and maintaining a disciplined schedule.

The Higgins Group Difference Founded on the principles of integrity, innovation, and local expertise, the Higgins Group is more than just a brokerage; we are a premier real estate brand with a legacy of excellence across Connecticut. We pride ourselves on being "big enough to lead, yet small enough to care."

As a Higgins agent, you have the backing of a firm that understands the nuances of the local landscape, from the coastal luxury of Fairfield County to the historic charm of New Haven County. Our brand is built on a "people-first" philosophy, ensuring that our agents have direct access to leadership and the most cutting-edge marketing resources in the industry.

### The Two Pillars of Your Growth

This program is structured into two strategic phases to take you from your first day in the office to your first closed transaction and beyond.

**Phase 1: The Foundation** Before you can scale, you must be stable. This phase focuses on the Higgins Ecosystem—integrating you into our office culture, mastering our internal software like Dotloop and the Design Center, and ensuring you are legally compliant and operationally organized.

**Phase 2: The Growth Engine** This is the core of your business. Here, we transition from the "how-to" of the office to the "how-to" of the market. You will learn the art of lead generation, the intricacies of working with buyers and sellers, the science of property valuation (CMA), and the specific strategies—the "Higgins Sizzle"—needed to win listings and close deals.

We provide the brand, the tools, and the training—your job is to provide the energy and the execution. We are committed to your success and are proud to have you representing the Higgins Group.

# Our Affiliations

Through our affiliations with Forbes Global Properties and Who's Who in Luxury Real Estate, Higgins Group Private Brokerage has access to an exclusive global network that spans more than 70 countries and reaches over 200 million people. These prestigious partnerships provide our clients with unparalleled marketing and exposure on the international stage. In fact, Higgins Group is consistently honored with "Best in Marketing" awards, ensuring that your property gets the attention it deserves—both locally and globally.





# Program Overview: Your Roadmap to Success

Our training program is strategically divided into two distinct phases: The Foundation and The Growth Engine. We begin by equipping you with the internal systems of the Higgins Group, then move into the high-level strategies required to build and sustain a thriving real estate business.

## Phase 1: The Foundation

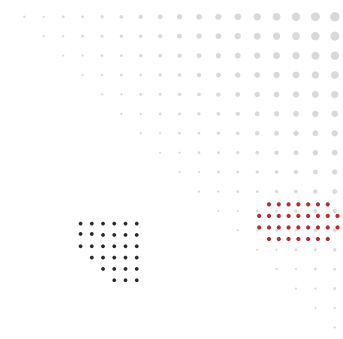
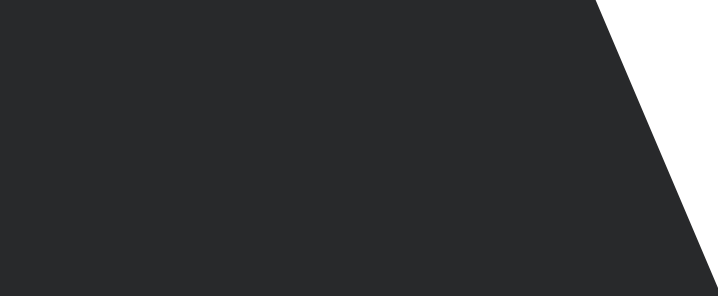
- 01 | Launchpad: Navigating the HG Dashboard and team.
- 02 | Office Procedures: Admin-led guide to listing-to-close workflows.
- 03 | Market Assist: Leveraging the Design Center and custom templates.
- 04 | Advertising Laws: Compliance for social media and web marketing.



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# Program Overview: Your Roadmap to Success

## Phase 2: The Growth Engine

- 05 | Building Your Business: Strategies for SOI nurturing and lead generation.
- 06 | Open House Mastery: Preparation, hosting, and lead capture techniques.
- 07 | Buyers: Forms, MLS jargon, and property tour etiquette. Crafting offers, negotiations, and contract acceptance.
- 08 | Mortgage Team: Financing essentials and pre-approval workflows.
- 09 | Rentals & Credit: Mastering leases, applications, and income potential.
- 10 | Dotloop: Full digital transaction and document management.
- 11 | The Higgins Sizzle: Brand promotion and the winning listing presentation.
- 12 | Sellers: Securing appointments and conducting walkthroughs. SmartMLS entry, sign logistics, and managing offers.
- 13 | Expired Listings: Sourcing leads and mastering cold-call scripts.
- 14 | CMA Mastery: Professional property pricing using the Agent Toolkit.



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# Phase 1: The Foundation Sequence

Establishing your infrastructure, compliance, and professional mindset.

## 01 | Launchpad: The Higgins Group Integration

Igniting Your Career Welcome to the team! This high-energy orientation is designed to get you "Higgins Ready." You will receive a guided tour of the Agent Dashboard, explore our exclusive internal programs, and meet the leadership team. This is where your transition from "agent" to "Higgins Group Professional" begins.

## 02 | Mission Control: Office Procedures & Admin Mastery

The Admin Team Success in real estate is won in the field but secured in the office. This hands-on workshop, led by our expert administrative staff, focuses on streamlining your workflow from listing to closing. Learn to master document compliance, optimize client communications, and leverage your admin team to reduce stress and keep your files audit-ready.

## 03 | The Design Center & Market Assist Program

Elevate your brand with the Higgins Group Design Center. We will walk you through our template management platform, featuring exclusive, high-end designs ready for your customization. You will also learn how to tap into our in-house Market Assist Program—our secret weapon for crafting flawless marketing materials that capture attention and win listings.

## 04 | Compliance & Reputation: Advertising Laws Review

In a digital world, a single non-compliant post can lead to heavy fines. This session is an essential deep dive into the legalities of real estate advertising. We will review how to build impactful, compliant profiles, websites, and email campaigns. Learn the "Safety Zone" for social media practices so you can market boldly without the fear of penalties.

# Phase 2: The Growth Engine

Turning market knowledge into active leads and commission.

## 05 | Building Your Business

The Art of Lead Gen Learn to nurture your Sphere of Influence (SOI) and announce your brand. We'll explore innovative lead generation tactics and social media strategies to turn your personal network into a consistent source of new opportunities.

## 06 | Open House Mastery

Converting Visitors to Clients An open house is a live audition. Master the full lifecycle: strategic prep, "Day-Of" hosting techniques, and the art of the follow-up. Learn the specific questions that reveal buyer motivation and secure the lead.

## 07 | Working with Buyers

Master the complete buyer journey, from the first tour to the final signature. This session blends technical essentials—like Representation Forms, MLS decoding, and keybox logistics—with the high-level strategy of crafting winning offers and negotiating terms. Gain the professional poise and "boots on the ground" proficiency needed to guide clients confidently from discovery to an accepted contract.

## 08 | The Mortgage Partnership

Led by: Colleen Polson To lead your buyers, you must understand their financing. Join our in-house partner to demystify the mortgage process, from the power of the pre-approval to supporting your clients through the underwriting phase.

## 09 | Rentals & Credit Reporting

Master the fast-paced rental market. Learn to handle applications, conduct credit checks, and prepare leases correctly. Matt covers the nuances of credit reports and how to turn rental transactions into a steady income stream.

## 10 | Dotloop: The Paperless Professional

Your All-In-One Transaction Hub Master the platform that centralizes your entire business. This session covers document editing, secure eSignatures, and real-time task management. Learn to manage your deals entirely in the cloud, ensuring total compliance while eliminating the need for printing or faxing.



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## Phase 2: The Growth Engine

Turning market knowledge into active leads and commission.

### 11 | Selling the Higgins Group "Sizzle"

Led by: Mr. Higgins Ignite your brand with insights from leadership. Mr. Higgins guides you through his proven listing presentation, helping you refine your talking points and leverage the full power of the Higgins Group identity to win listings.

### 12 | Working with Sellers (Part 1)

Master the listing lifecycle from the initial handshake to a "Sold" sign. This session covers the essentials of securing the appointment, property evaluations, and legal compliance for listing forms, followed by the tactical execution of the active phase. Learn to manage SmartMLS entry, marketing logistics, and the complexities of multiple-offer scenarios to ensure a seamless experience and a successful outcome for your sellers.

### 13 | Hunting Expired Listings

Turning Rejection into Opportunity Learn to identify and capitalize on properties that didn't sell the first time. We'll cover where to find homeowner data and how to master "Cold Call" scripts and objection-handling to turn expired leads into new commissions.

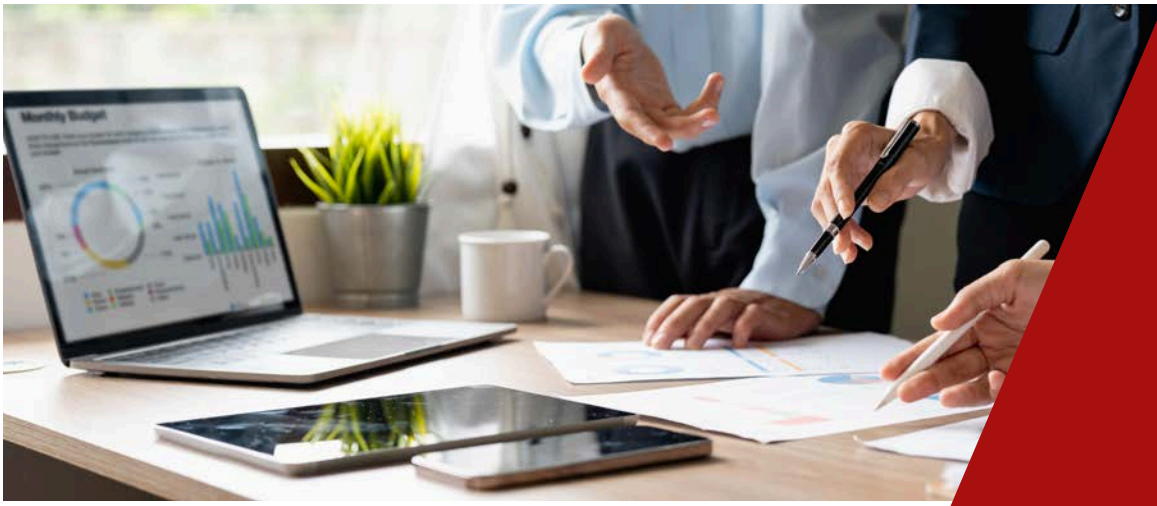
### 14 | CMA Mastery: Pricing for Profit

The Science of Valuation Master the fundamentals of crafting a Comparative Market Analysis (CMA). Learn to use our branded Toolkit Program to create data-driven reports and professional buyer presentations that build immediate client trust.



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## Phase 3: Program Conclusion: Your Professional Launchpad

By completing these 14 sessions, you have moved from a foundational understanding of the Higgins Group ecosystem to mastering the advanced strategies of lead generation, negotiation, and closing.

Real estate is a business of momentum. The knowledge within this manual is designed to be your engine, but your consistency is the fuel. As you move forward, remember that the Higgins Group leadership, our admin teams, and your fellow agents are here to support your growth.

**You have the tools. You have the brand. You have the training.  
The only variable left is your work ethic.  
Welcome to the Higgins Group—we can't wait to see you succeed."**



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# Higgins Group Agent Goal Setting Worksheet



## 1. My "Why"

What is the primary motivation behind my real estate career?



## 2. Income & Transaction Goals

- Annual Income Goal: \$\_\_\_\_\_
- Average Commission per Deal: \$\_\_\_\_\_
- Transactions Needed to Hit Goal: \_\_\_\_\_
- Current Number of Contacts in SOI: \_\_\_\_\_



## 3. Weekly Activity Commitments (The "Success Schedule")

- Lead Gen Hours per week: \_\_\_\_\_
- Number of SOI calls per week: \_\_\_\_\_
- Number of Open Houses per month: \_\_\_\_\_
- Target number of new listings this year: \_\_\_\_\_

## 4. Skill Development

Which three Phase 1 or 2 classes do I need to master most?

1.

2.

# Higgins Group Training: Complete Master Schedule

**All Sessions are held live in Westport  
Monday, Wednesdays & Fridays from 11:00 am - 1:30 pm**

## Phase 1: The Foundation

01   Launchpad: Navigating the HG Dashboard and team.	5/13/2026
02   Office Procedures: Admin-led guide to workflows.	5/13/2026
03   Advertising Laws: Compliance and social media.	5/15/2026
04   Market Assist: Design Center and custom templates.	5/15/2026

## Phase 2: The Growth Engine

05   Building Your Business: SOI and lead generation.	5/18/2026
06   Open House Mastery: Prep, hosting, and follow-up.	5/18/2026
07   Mastering Working with Buyers	5/20/2026
08   Mortgage Team: Financing and pre-approvals.	5/27/2026
09   Rentals & Credit: Leases, apps, and income	5/27/2026
10   Dotloop: Full digital transaction management.	5/29/2026
11   The Higgins Sizzle: Brand and listing presentations.	6/1/2026
12   Mastering Working with Sellers	6/3/2026
13   Expired Listings: Sourcing leads and scripts.	6/5/2026
14   Mastering the CMA/Pricing & Comps	6/8/2026



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