

Agent B-Plan Summit

How to Write a Business Plan for a Real Estate Agent

Top Agent B-Plan Review



Shane

White

best year

207 closings

\$36 million

Mission Statement: Our mission is to provide the highest level of customer service by incorporating knowledge, integrity, professionalism, and commitment. Our team is dedicated to exceeding our client's expectations.

Core Values: Excellence is our minimum standard.
Absolute honesty and integrity.
Live the “Platinum Rule”...treat
others the way they want to be
treated.
Education and self improvement is
vital to our success.
There is no “I” in TEAM.

2008 Goals

Sales: 39 Million

Units: 225 Sides

Gross Commission: \$1,170,000

Average Sales Price: \$175,000

Quest:

Perfect real estate transaction.

Values:

Family, Fun, Respect, Profit

Strategies:

Team Approach

Customer for Life

Unquestionable Integrity

Team Development

Executive Summary

RE/MAX Town & Country and The Shane T. White Team are currently in an expansion phase. 2007 was an “OK” year in terms of business and the current status of the real estate market. The 2008 Goal of 39 Million in sales is a 6.5% increase over 2007’s closed business and the increase to 225 sides is an 8% increase over 2007. We feel with the current state of the real estate market and the buyer’s hesitance to make decisions to buy, these goals will be challenging to achieve. Our goal this year is to implement better systems, especially on the listing side. We have set ideas to implement from our retreat this year, and will focus on one idea each meeting until they are all implemented. We will need to add a dedicated agent to help with Drennan Day’s business and to cover the lot sales for the new development Rio Ancho Ranch.

The Shane T. White Team's objective is to give our clients unwavering service and negotiate the best possible purchase contract with the greatest likelihood of closing escrow and closing on time.

RE/MAX Town & Country may also look to add additional "independent" agents to the company that will perform outside the realm of the "Team". Paula Edwards moved to an independent agent in 2007.

RE/MAX Town & Country operates as a Sub Chapter S organization. Its key management is as follows:

Shane T. White

CEO/Listing Specialist/Team Leader

8 years in the business

Diamond Club from RE/MAX

Chairman's Club from RE/MAX

Lifetime Achievement from RE/MAX

Hall of Fame from RE/MAX

Consistently ranked among the top Austin RE/MAX Teams

Paige White

Owner/Advisor

6 ½ years in the business

Clyde A. Davis

Team member/Advisor

27 years in the business

Hall of Fame from RE/MAX

Liz Barta

Accounting/HR

Financial operations

Ginger Floyd

Team Manager/Marketing Administrator

9 years in the business

Licensed Assistant

Amber Felps Closing Coordinator/Marketing Assistant
Licensed Assistant/ Buyer's Specialist

Nicole Henry Closing Coordinator/Assistant

Juan Ayala Buyer's Specialist

Michelle Cearley Buyer's Specialist

Mary Jo Tyrrell Buyer's Specialist

Mendy Wright Buyer's Specialist

Support Teams:

Bill Caton – CPA

Michael Dion – Computer/Technology

Current market conditions for the Liberty Hill area shows a normal market with normal/growing inventory. Range of professionals from independent agents to companies. RE/MAX controls 27% of the residential market. RE/MAX, Keller Williams, Shin Oak Realty, Century 21, City Real Estate & Mortgage, and Coldwell Banker controls over 54% of the residential market.

Management and Organization

Management Team

Rain Maker:	Shane T. White
Partner/Advisor:	Paige White

Key support personnel and job descriptions

Team Manager and Marketing Administrator: Ginger Floyd

- Listing maintenance

- Agent feedback

- Property marketing (ads, flyers, brochures, etc.)

- Manage the marketing plan

- Seller kits

- Buyer kits

- Special Marketing Events

Closing Coordinators / Marketing Assistants: Amber Felps and Nicole Henry

- Escrow maintenance to closing

- Schedule inspections, responses, loan coordination, etc.

- Closing packages and gifts

- Assist with marketing duties as directed by Ginger or Shane

Accounting/HR: Liz Barta

- Performs all accounting functions including writing checks

- Prepares yearly budget and P&L statements

- Meets with Shane monthly to go over budget and P&L

- Performs HR functions including payroll/retirement plans/etc.

Marketing Plan

Objective: To increase the number of qualified buyers and sellers that we will come into contact with that will lead to an increase in sales and profitability for the team and company.

- I. Client Appreciation Program – Continue with CAP program of mailings followed up with phone calls, writing personal notes (at the minimum 5/person/week), client appreciation functions: Christmas in November (?)...may change this year, possible summer party, possible summer movie event, Pop Bys with clients in CAP program (at least May: bulbs/plants for Mother's Day, July: sparklers/flags, December: CDs), business luncheons. This will increase the number of referrals and repeat business that we receive from past clients and our sphere of influence. Continue to increase this database with new clients that we close.

- II. Newsletter – Reduce the number but increase the quality...7000+ per month to Liberty Hill, Bertram, west Georgetown, out of town owners, and past clients. This increases our name recognition, market presence, and is an avenue to advertise all of our listings and generate buyer calls. The newsletter will be printed with full color front and back. We will also revamp the look of the newsletter to incorporate the new STW logo and full color photos. We will get the newsletters out on time every time according to the marketing schedule. Approx cost for newsletter only is \$950/month (not including postage).

- III. Closing Gifts – Continue giving gifts at closings that have better shelf life: T-Shirts, Blankets, Mugs, Gift Cards, Drawings of Houses...the Drawings of Houses will be more of a standard gift for buyers who buy houses (not trailers, etc.) We will create a “standard” shelf life gift...especially for buyers.
- IV. Referral Gifts – Continue to send small tokens for referrals received the day we receive it: Restaurant cards, Barnes & Noble, Movie Tickets, Home Depot, Movie Rentals & Popcorn, Alamo Drafthouse
- V. Referral Contest – add each person that sends us a referral to the referral contest to win Southwest Airlines gift cards. The person receives one entry into the contest for the first referral and then 5 entries for each other referral sent during the year.

- VI. Brochures/flyers for each house – Continue to have brochure boxes filled with color flyers with IVR number to call and have every other listing on the back with IVR numbers to call. Flyers to be delivered by Thursday of each week for each listing.
- VII. Make signs more of a priority, i.e. put up pending/sold signs in a timely manner. Also, use directional signs when the opportunity arises so we have even more of a “presence” in the market. If possible, the directional signs will have our 515-LAND phone number on it. The use of 4X8 signs on highly visible properties, especially commercial properties, is vitally important as well.

- VIII. Implement the new Pro Step Marketing website. Once set up, cancel the Real Pro Site and start phasing out the #1 Expert site. Look at implementing the SEO from Pro Step Marketing. List all our listings on the 2 sites that will post them to 40 other sites at a minimal cost per Pro Step Marketing.
- IX. Use virtual tours on at least ½ of our house listings and get them posted on REALTOR.COM
- X. Use the enhanced listings on REALTOR.COM to promote our listings online.
- XI. Send an email out to all “Liberty Hill” selling agents with each new listing we get within 1 week. Occasionally on the larger listings, we will use the email flyer program to get it out to 4000+ agents within 2 weeks.

- XII. Local sponsorships – Sponsor local teams: Little League? (cost may be too high), Basketball, Soccer, etc. Stay within the budget for sponsorships as it can get out of control.
- XIII. Continue with local newspaper ads to have a “general” presence for those buyers/sellers who pick up these publications.
- XIV. Full page color ad in the Liberty Hill phone book
- XV. Where our business came from in 2007 (see attached)
- XVI. Marketing Calendar (see attached)

2007				
	2007 Analysis of Sources			

Real Estate Sources

Sources	# Listing Sources	% Listing Sources / Total	# Buyer Sources	% Buyer Sources / Total	Total # Sources	% Total # Sources / Total
Client Referrals	3	2.7%	36	38.3%	39	18.8%
Listing Referrals	0	0.0%	0	0.0%	0	0.0%
Relocation	1	0.9%	0	0.0%	1	0.5%
Billboard	0	0.0%	0	0.0%	0	0.0%
Exp Listings	0	0.0%	0	0.0%	0	0.0%
Craig's List	0	0.0%	1	1.1%	1	0.5%
CMA Web calendar	1	0.9%	0	0.0%	1	0.5%
Sphere/Influence	13	11.5%	15	16.0%	28	13.5%
Newsletter	0	0.0%	1	1.1%	1	0.5%
Walk-in	1	0.9%	2	2.1%	3	1.4%
Sign	0	0.0%	13	13.8%	13	6.3%
Website	0	0.0%	3	3.2%	3	1.4%
Agent Referrals	1	0.9%	0	0.0%	1	0.5%

Sources	# Listing Sources	% Listing Sources / Total	# Buyer Sources	% Buyer Sources / Total	Total # Sources	% Total # Sources / Total
Brochure	0	0.0%	0	0.0%	0	0.0%
Out/town New	0	0.0%	0	0.0%	0	0.0%
Reputation	20	17.7%	4	4.3%	24	11.6%
Just Sold Car	0	0.0%	0	0.0%	0	0.0%
Builder	0	0.0%	0	0.0%	0	0.0%
Repeat	19	16.8%	8	8.5%	27	13.0%
Jon	51	45.1%	8	8.5%	59	28.5%
Realtor.com	0	0.0%	1	1.1%	1	0.5%
REO	2	1.8%	0	0.0%	2	1.0%
Aggie Newsltr	0	0.0%	0	0.0%	0	0.0%
Buyer/Listing	1	0.9%	0	0.0%	1	0.5%
For Sale/Own	0	0.0%	0	0.0%	0	0.0%
Showcard	0	0.0%	0	0.0%	0	0.0%
#1 Exp	0	0.0%	2	2.1%	2	1.0%
	<u>0</u>	<u>0.0%</u>	<u>0</u>	<u>0.0%</u>	<u>0</u>	<u>0.0%</u>
Totals	113	100.0%	94	100.0%	207	100.0%

Sources	Listing Source Vol	% Listing Sources Vol/Total	Buyer Source Vol	% Buyer Sources Vol/Total	Total Sources Volume	% Total Sources Vol / Total
Client Referral	429,000	2.3%	2,663,000	14.8%	3,092,000	8.5%
Listing Referral	0	0.0%	0	0.0%	0	0.0%
Relocation	338,000	1.8%	0	0.0%	338,000	0.9%
Billboard	0	0.0%	0	0.0%	0	0.0%
Exp Listings	0	0.0%	0	0.0%	0	0.0%
Craig's List	0	0.0%	60,000	0.3%	60,000	0.2%
CMA Web car	74,900	0.4%	0	0.0%	74,900	0.2%
Sphere/Influ	2,564,500	13.8%	3,269,938	18.2%	5,834,438	16.0%
Newsletter	0	0.0%	340,000	1.9%	340,000	0.9%
Walk-in	100,000	0.5%	523,000	2.9%	623,000	1.7%
Sign	0	0.0%	2,247,050	12.5%	2,247,050	6.2%
Website	0	0.0%	638,360	3.5%	638,360	1.7%
Agent Referral	80,000	0.4%	0	0.0%	80,000	0.2%
Brochure	0	0.0%	0	0.0%	0	0.0%

	Listing Source Vol	% Listing Sources Vol/Total	Buyer Source Vol	% Buyer Sources Vol/Total	Total Sources Volume	% Total Sources Vol / Total
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Brochure	0	0.0%	0	0.0%	0	0.0%
Out/town New	0	0.0%	0	0.0%	0	0.0%
Reputation	3,772,779	20.4%	475,027	2.6%	4,247,806	11.6%
Just Sold Car	0	0.0%	0	0.0%	0	0.0%
Builder	0	0.0%	0	0.0%	0	0.0%
Repeat	3,299,859	17.8%	5,255,800	29.2%	8,555,659	23.4%
Jon	7,527,942	40.6%	1,764,565	9.8%	9,292,507	25.4%
Realtor.com	0	0.0%	150,000	0.8%	150,000	0.4%
REO	104,500	0.6%	0	0.0%	104,500	0.3%
Aggie Newsltr	0	0.0%	0	0.0%	0	0.0%
Buyer/Listing	240,000	1.3%	0	0.0%	240,000	0.7%
For Sale/Own	0	0.0%	0	0.0%	0	0.0%
Showcard	0	0.0%	0	0.0%	0	0.0%
#1 Exp	0	0.0%	599,000	3.3%	599,000	1.6%
	<u>0</u>	<u>0.0%</u>	<u>0</u>	<u>0.0%</u>	<u>0</u>	<u>0.0%</u>
Totals	18,531,480	100.0%	17,985,740	100.0%	36,517,220	100.0%

January 2008

SUN	MON	TUE	WED	THU	FRI	SAT
		1 	2	3	4	5
6	7	8 CAP	9	10	11	12
13	14	15	16 Newsletter	17	18	19
20	21	22	23	24	25	26
27	28 CRS SELLABRATION 28th-30th	29 CRS SELLABRATION 28th-30th	30 CRS SELLABRATION 28th-30th	31		

February 2008

SUN	MON	TUE	WED	THU	FRI	SAT
					1	2
3	4	5 CAP	6	7	8	9
10	11	12	13	14 RE/MAX State Convention 	15 RE/MAX State Convention	16 RE/MAX State Convention
17	18	19	20	21	22	23
24	25	26	27 Newsletter	28	29	

March 2008

SUN

MON

TUE

WED

THU

FRI

SAT

1

2

3 RE/MAX
Int'l Convention
**Daylight
Saving Card**

4 RE/MAX
Int'l Convention
CAP

5 RE/MAX
Int'l Convention

6 RE/MAX
Int'l Convention

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April 2008

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CAP

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Newsletter

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May 2008

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5 Mother's Day Cards Mailed	6 CAP	7	8	9	10
11	12	13	14 Newsletter	15	16	17
Mother's Day	18	19	20	21	22	23
24	25	26 	27	28	29	30
31						

June 2008

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CAP

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Father's Day
Cards Mailed

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Newsletter

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July 2008

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CAP



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StarPower

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StarPower

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StarPower

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StarPower

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August 2008

SUN	MON	TUE	WED	THU	FRI	SAT
					1	2
3	4	5 CAP	6 Newsletter	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31		Bertram Teacher Breakfast??				

September 2008

SUN	MON	TUE	WED	THU	FRI	SAT
	1 Labor Day 	2 CAP	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17 Newsletter	18	19	20
21	22	23	24	25	26	27
28	29	30				

October 2008

SUN

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TUE

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CAP

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Newsletter

Team Retreat

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**Daylight
Saving Card**



November 2008

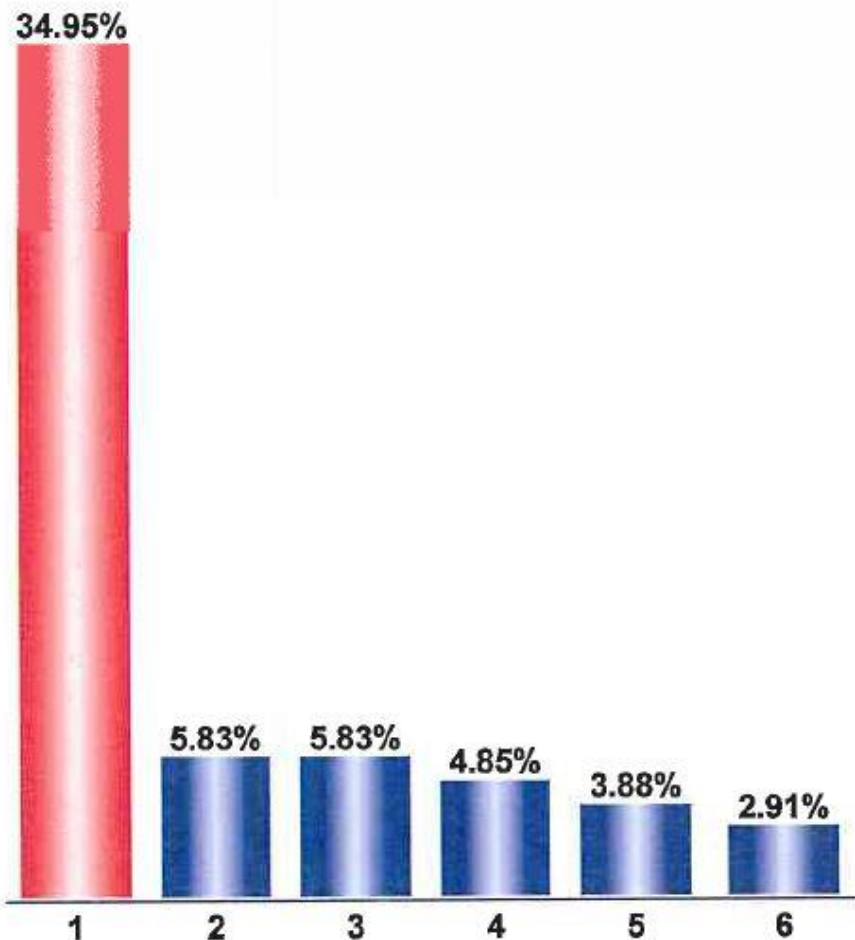
SUN MON TUE WED THU FRI SAT

						1
2	3	4 CAP	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27 	28 	29
30		Christmas In November Invitations Sent??	Christmas In November ??			

December 2008

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2 CAP	3	4	5	6
7	8 CDs Mailed	9	10	11	12	13
14	15	16 Office Christmas Party	17 Newsletter	18	19	20
21	22	23	24 	25 	26	27
28	29	30	31			

RE/MAX® Premier Market Presence



Market Share by Listing Units Sold

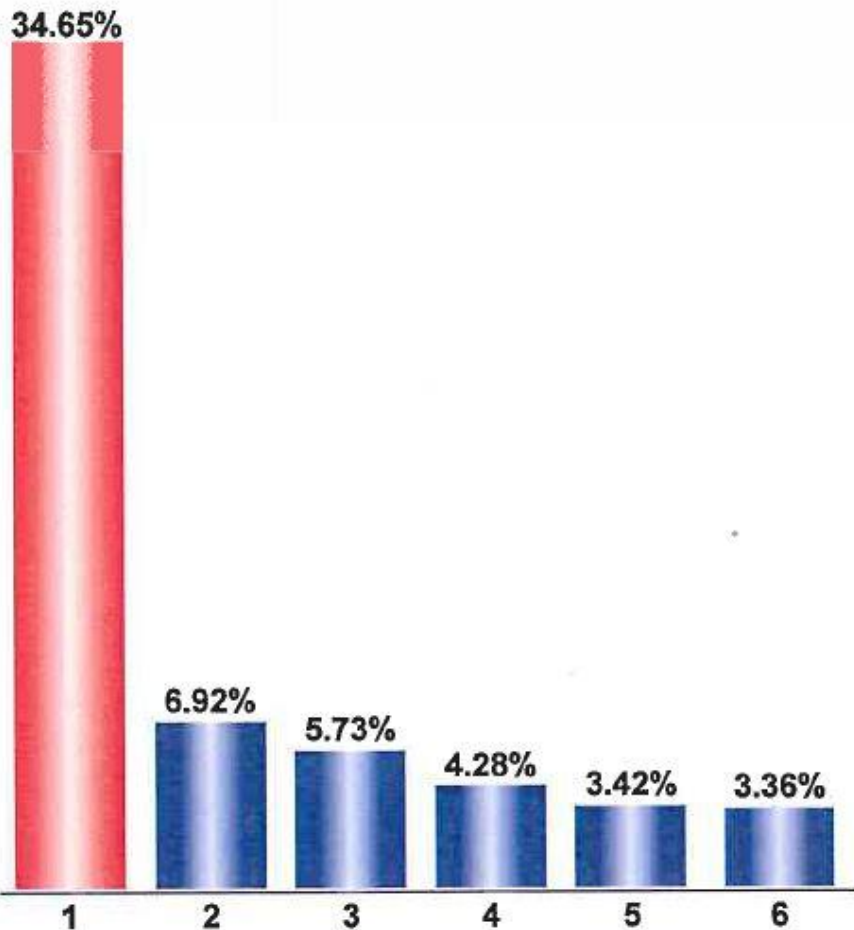
	Ranking	MkShare	DOM
1	RE/MAX	34.95%	0
2	City Real Estate and Mortgage	5.83%	0
3	KellerWilliams	5.83%	0
4	ShinOakRealty	4.85%	0
5	RoyalProperties	3.88%	0
6	Century21	2.91%	0

- ☒ Market: AUSTIN
- ☒ Area: LH
- ☒ Type: RES
- ☒ Closing Date: 1/1/2007 - 12/31/07



Based on data compiled from all residential properties sold in Austin Areas These statistics represent the "Sold" Listings of all office locations and independent offices of each multi-office or franchise organization identified which listings were sold by such organization, according to the publications of the Multiple Listing Service for Residential Properties (existing and new) in the Austin MLS areas for the time period indicated. Note: This representation is based in whole or in part on data supplied by Austin MLS. Neither the Association or its MLS guarantees or is in any way responsible for its accuracy. Data maintained by the Association or its MLS may not reflect all real estate activity in the market. Each RE/MAX Office is Independently Owned and Operated.

RE/MAX® Premier Market Presence




Market Share by Listing Units Sold Amount

1		RE/MAX	34.65%
2		KellerWilliams	6.92%
3		City Real Estate and Mortgage	5.73%
4		J.PaulAubinCo.	4.28%
5		CrystalFallsRealty	3.42%
6		ColdwellBanker	3.36%

 **Market:** AUSTIN

 **Area:** LH

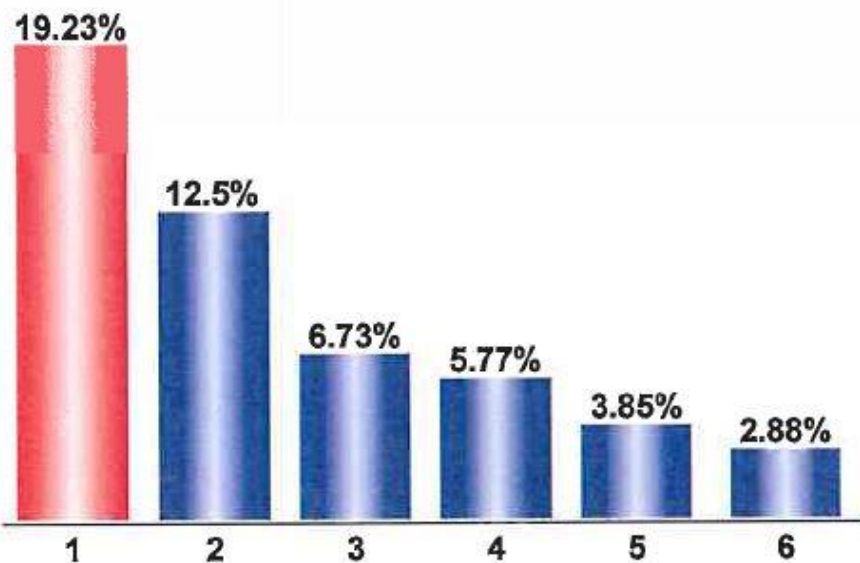
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RE/MAX® Premier Market Presence





Market Share by Selling Units Sold

1		RE/MAX	19.23%
2		KellerWilliams	12.5%
3		Century21	6.73%
4		ShinOakRealty	5.77%
5		City Real Estate and Mortgage	3.85%
6		ColdwellBanker	2.88%

 **Market:** AUSTIN

 **Area:** LH

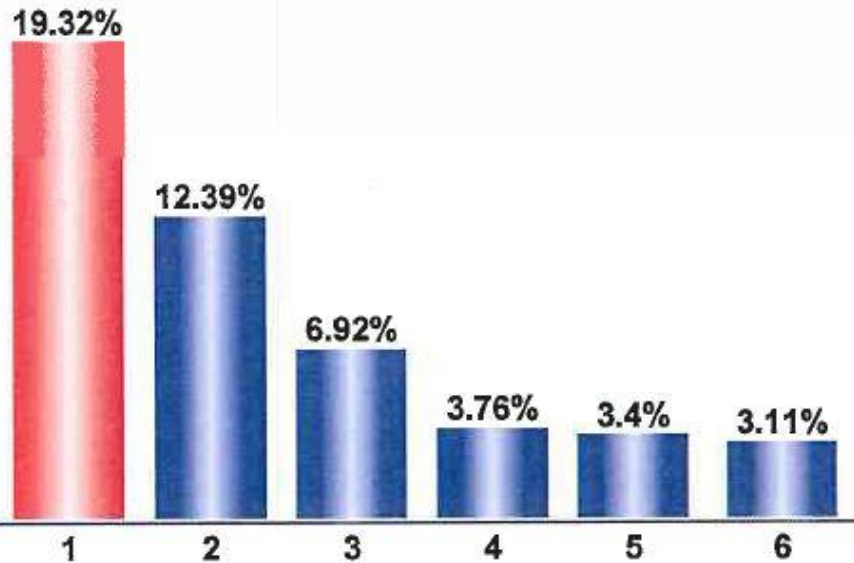
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RE/MAX® Premier Market Presence




Market Share by Selling Units Sold Amount

1		RE/MAX	19.32%
2		KellerWilliams	12.39%
3		Century21	6.92%
4		ShinOakRealty	3.76%
5		PacesetterProperties	3.4%
6		Anders Realty & Mortgage Group	3.11%

 **Market:** AUSTIN

 **Area:** LH

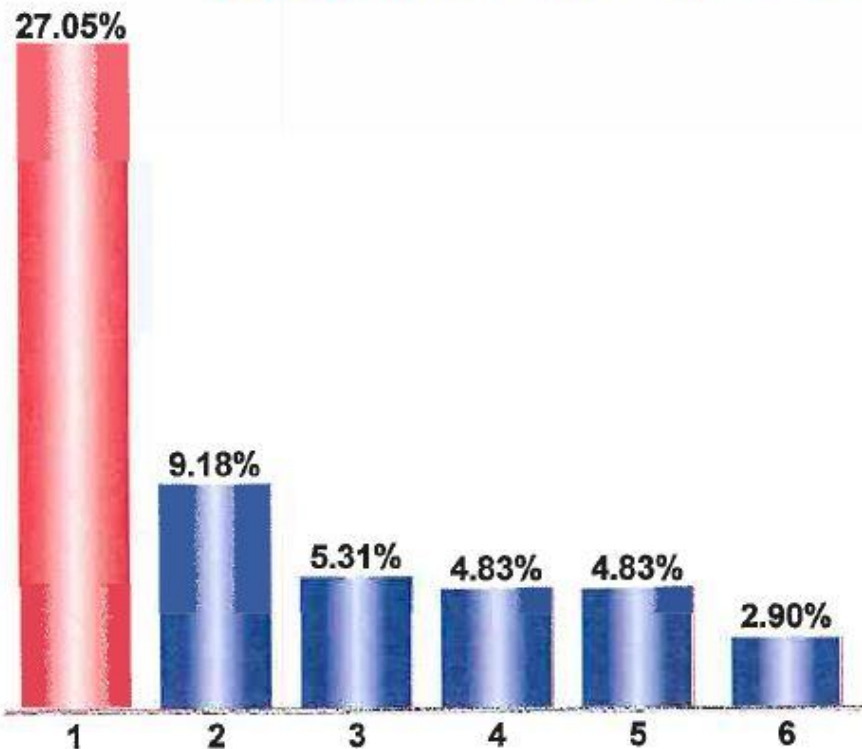
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RE/MAX® Premier Market Presence



Market Share by Transaction Units Sold

1	RE/MAX	27.05%
2	KellerWilliams	9.18%
3	ShinOakRealty	5.31%
4	Century21	4.83%
5	City Real Estate and Mortgage	4.83%
6	ColdwellBanker	2.90%

Market: AUSTIN

Area: LH

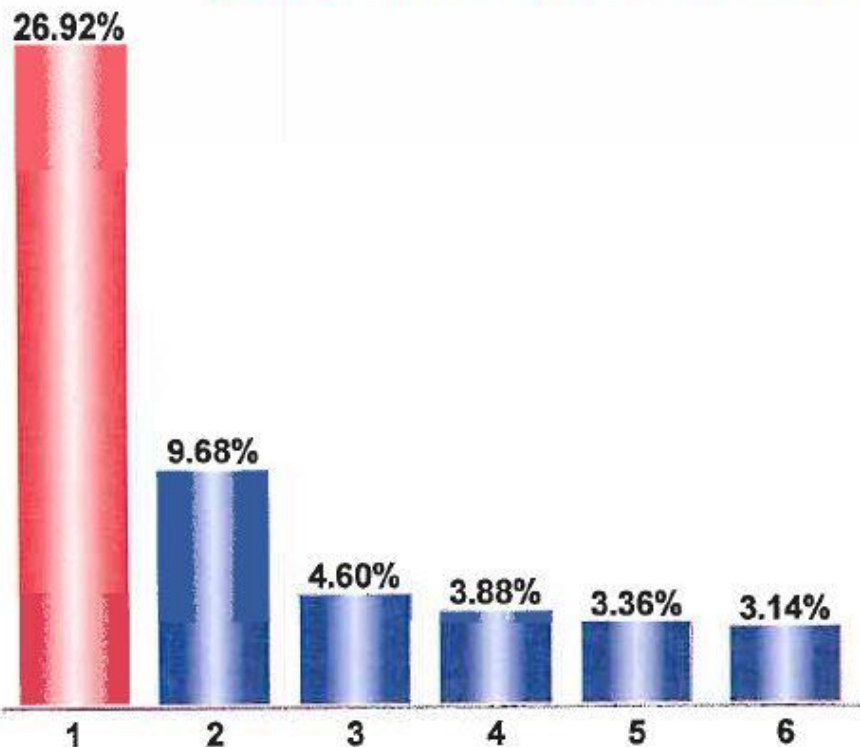
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Market Share by Transaction Units Sold Amount

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3		Century21	4.60%
4		City Real Estate and Mortgage	3.88%
5		ShinOakRealty	3.36%
6		J.PaulAubinCo.	3.14%

-  **Market:** AUSTIN
-  **Area:** LH
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How to Write a Business Plan for a Real Estate Agent

Top Agent B-Plan Review



Q&A

Shane White

www.ShaneTWhiteTeam.com