

PERCY^{AI}

Driving Predictable Listings

Clients for Life: Driving Repeat and Referral Business



Presented by:

Brandon Carroll

Vice President, Client Success

brandon@percy.ai

First, a quick poll to
see where we stand as
an audience today!

POLL

YES or NO: Have you subscribed any of your Past Clients to receive a monthly report from Percy?

- A. YES
- B. NO



Agenda

1. **Recap: The Power Play**
2. Current State of “Past Clients”
3. The Past Client System
4. Asking for Referrals
5. Summary / Next Steps

The Power Play

Equity Insights

\$ Equity In Your Home

Equity is your home's worth to you!

[EDIT DETAILS](#)

Estimated Equity Today

\$625,090

[EDIT DETAILS](#) [How is this calculated?](#)



Do you have questions on how to leverage your home's equity?

[Element Mortgage](#) is a lender Hawaii Life trusts to answer questions

[Ask Us](#)

[Disclaimer](#)

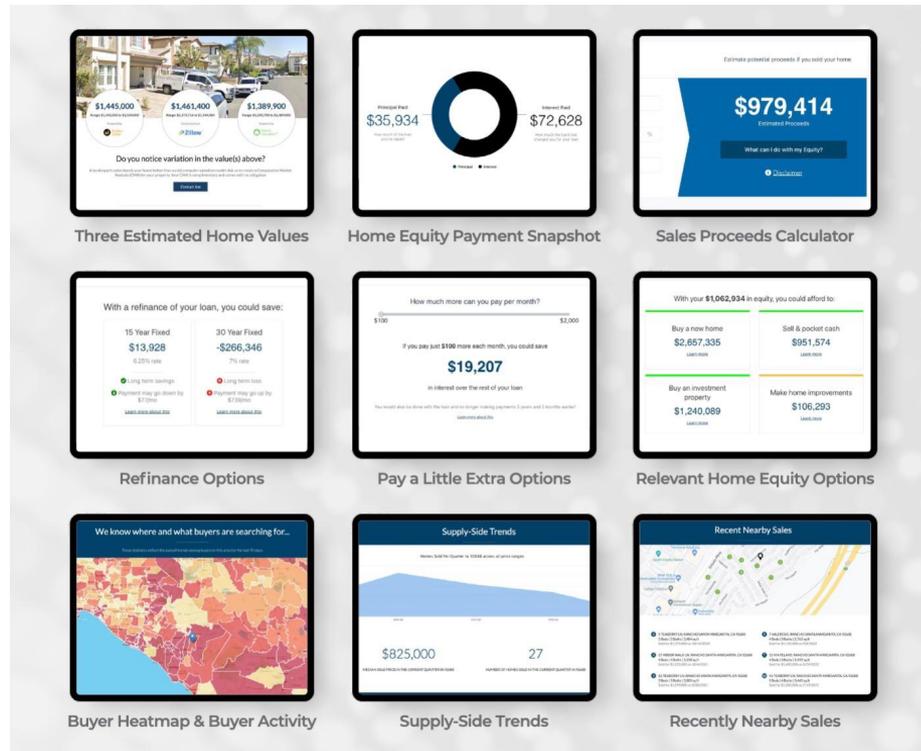


Past Client Bulk Upload



Power Play: Equity Insights

- Add Equity Insights to make a more comprehensive home valuation report
- Increase the number of calls-to-action.
- Drive 3x more conversations via the “Ask Us” button
- Increase conversion rates by 15+%
- [Sample link](#)



Key Insight - Equity Conversion Rates

Pre-Equity

(02/08/2021 - 02/08/2022)

- 18,610 Listing Leads
- \$9B in Volume
- Avg: \$489,368

- 1,216 Conversions (6.5%)
- \$603M in Volume
- Avg: \$495,695

- 141 “Contact an Agent” (0.7%)

Post-Equity

(02/08/2022 - 02/08/2023)

- 14,302 Listing Leads (↓ **23%**)
- \$7.9B in Volume (↓ **13%**)
- Avg: \$552,607 (↑ **13%**)

- 1,073 Conversions (7.5%) (↑ **15%**)
- \$613M in Volume (↑ **1.6%**)
- Avg: \$572,133 (↑ **15%**)

- 303 “Contact an Agent” (2.1%) (↑ **279%**)

Power Play: Past Client Upload

- Subscribe past clients and any buyers you are working with to receive the monthly report.
- Provide it as a *service* to your past clients to ensure you always stay top of mind.
- **You can expect a ~1-3% conversion rate**
- **Our Recommendation:**
Start with 250-500 contacts



Long Realty Case Study

- Partnered with agents and subscribed 4,900 Past Clients en masse to receive the monthly report.
- Had 3 listing appointments within the **first few hours.**
- Since launching it in Q3 2022, they **saw 195 listings turn to active or sold from that list of 4,900.**



The Power Play: Summary

Equity Insights

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Estimated Equity Today
\$625,090
[EDIT DETAILS](#) [How is this calculated?](#)

 Do you have questions on how to leverage your home's equity?
[Ask Us](#)
Element Mortgage is a lender Hawaii Life trusts to answer questions [Disclaimer](#)

↑ **15%** Conversion Rate
↑ **279%** Conversations

Past Client Bulk Upload



↑ **3%** Conversion Rate

ANY QUESTIONS?



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THIS IS ONE OF MY FAVORITE TOPICS

Brandon's Background on Past Clients



9+ years of experience with CRM

- Early employee of Contactually (CRM acquired by Compass)
- Was the Director of Education before the acquisition
- Have trained over 20,000 real estate agents!
- Developed our training materials on **how to engage your networks, especially your past clients!**

Engaging Sellers



YOUR GEOGRAPHIC SPHERE:

Those homeowners in the location you farm. Most of these Homeowners still need to be introduced to you & your brand.

WHAT TO DO:

[Send out direct mailers with a QR code](#) that directs them to your own What's My Home Worth Page.

[Ad Retargeting](#). Redirect any purchased local ads for homeowners to check their home's value on your Home Valuation Page.

YOUR SOCIAL SPHERE:

These are your 1st & 2nd degree contacts engaged with your social media profiles.

WHAT TO DO:

[Post content about the market & housing price changes](#) directing them to check the value of their own home. Include your home valuation site in your newsletter and/or emails that you send to your network.

CLIENTS:

These are the people you've already worked with in the past. It's a great opportunity to update them on their home's value & buyer demand.

WHAT TO DO:

1. [Subscribe each of these contacts to a monthly Home Value Report](#) coming from you each month. That way when we go into the hot season, they've already been getting a report from you on their home's value increasing month over month.
2. [Create a Buyer Market Analysis report for the homeowner's you've worked with in the past](#). This is a great way to start a conversation about how the market is this new year, the new home values, buyer demand, and see what their plans are.

Engaging Sellers



CLIENTS:

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Current State of “Past” Clients

These have been big trends amongst Brokerages + Realtors

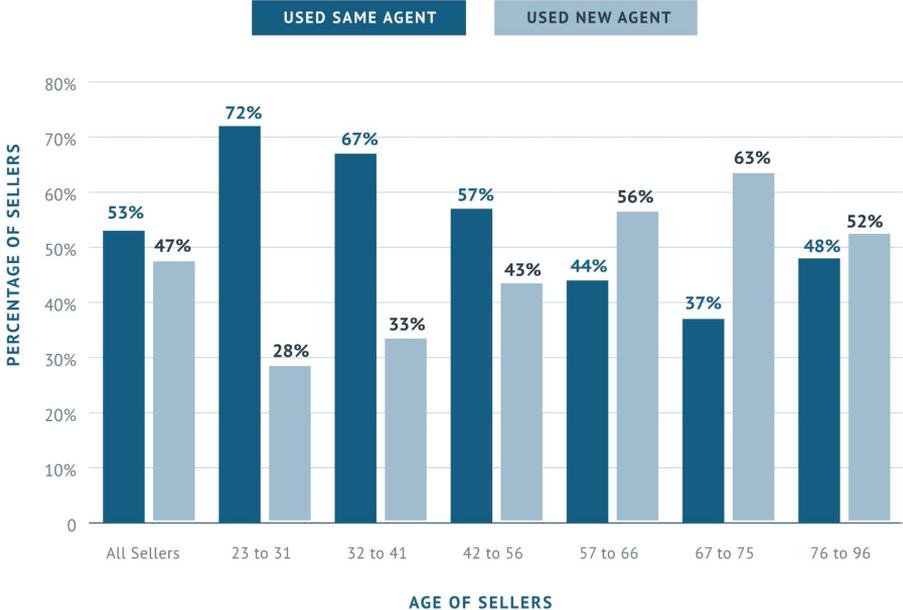


No such thing as a “Past Client”



Then, why are repeat business rates so low?

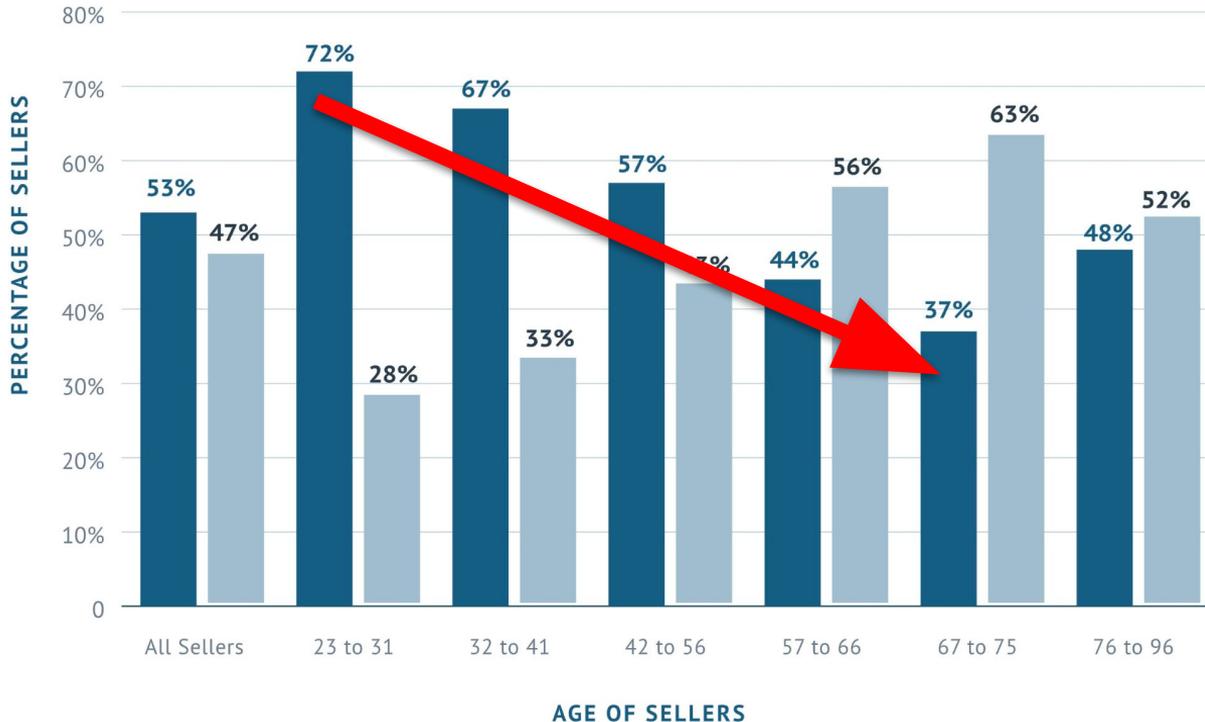
DID SELLERS USE THE SAME REAL ESTATE AGENT FOR THEIR HOME PURCHASE?



DID SELLERS USE THE SAME REAL ESTATE AGENT FOR THEIR HOME PURCHASE?

USED SAME AGENT

USED NEW AGENT



The likelihood of repeat business plummets over time

The Ultimate Statistic

89% of buyers would use their agent again or recommend their agent to others.

18% of buyers actually use their agent again when it comes to list their home.

We have all seen this....



Why is that?



Leads

VS



Clients

We treat leads differently than clients



How we treat leads

- Prompt, responsive, helpful
- Proactively send homes and information related to their personal needs
- Marketing materials are well designed and high quality
- We build systems in order to engage (lead funnels, etc)
- We spend money to acquire them.
- We dress the part

We treat leads differently than clients



How we treat clients

- We often forget them
- Reactive engagement, replies aren't prioritized in the inbox
- Send generic emails (newsletter, etc) or gifts like calendars
- We do not have system to engage personally
- We don't spend money on them after their initial closing gift.

The Real Estate Transaction Is Often Their Largest Purchase Ever

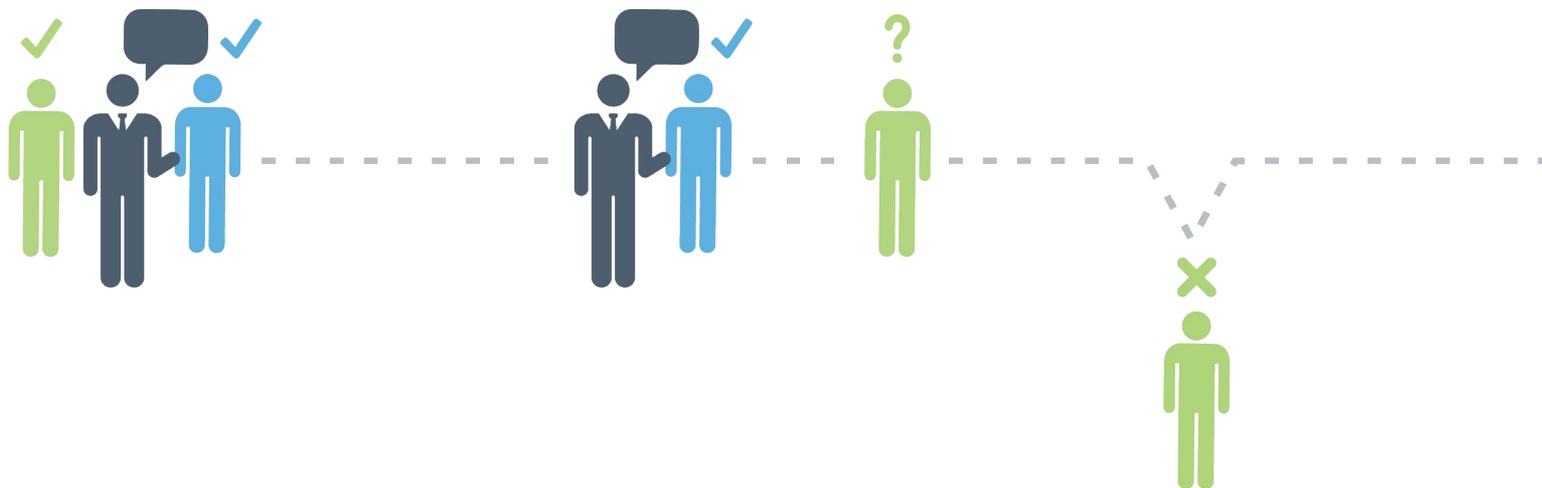


A Moment of Truth

- Third most stressful time in their life
 - Behind death and job loss
- Single largest financial asset they have
- Emotional memory from that transaction
- Goodwill generated from it

So what happens when we don't engage?

Relationships decay over time



And that impacts mindshare

“When I think of real estate, I think of [x]”



ANY QUESTIONS?

YES or NO:

Does this resonate with you?



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The Past Client System

HOW TO KEEP YOUR CLIENTS ENGAGED

ARE YOUR ENGAGEMENT STRATEGIES ADDING REAL VALUE?



Susan's Real Estate Roundup
All the Seattle real estate news that you need to know!

Susan Williamson (206) 555-4455 susan.smith@pacerealsolutions.com



10 Things You Can Do to Sell Your Home Faster

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Me vs. You Marketing



 **Susan's Real Estate Roundup**
All the Seattle real estate news that you need to know
Susan Williamson (206) 555-4456 susan.sm78@pacerealestate.com 

10 Things You Can Do to Sell Your Home Faster

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VS

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Public View |  |  | **Join the Owner**

Market Report for
132 Tudor Dr
North Wales, PA 19454
4 beds | 3 baths | 2,762 sq.ft. 

PREPARED BY:
 **Judy Jack Lewis**
Cell: (716) 848-6393

Receive monthly updates on this property

First Name Last Name
Email Address

Estimated Home Value

These values are generated by automated computer modeling drawn from public records and should not be considered a definitive statement of this property's worth.

Me vs. You Marketing

Me Marketing

- Helps me directly
- Generic and not personalized
- A template that can easily be sent from another agent
- Pitch your service before you know if they are interested
- Focus is on selfishly serving themselves

You Marketing

- Helps the homeowner directly
- Personalized and unique
- Not something easily replicable; difficult to produce
- Enable the homeowner to reach out to you when they are ready and/or provide a signal to help you serve them better.
- Focus is on selflessly serving their customer

The Past Client System

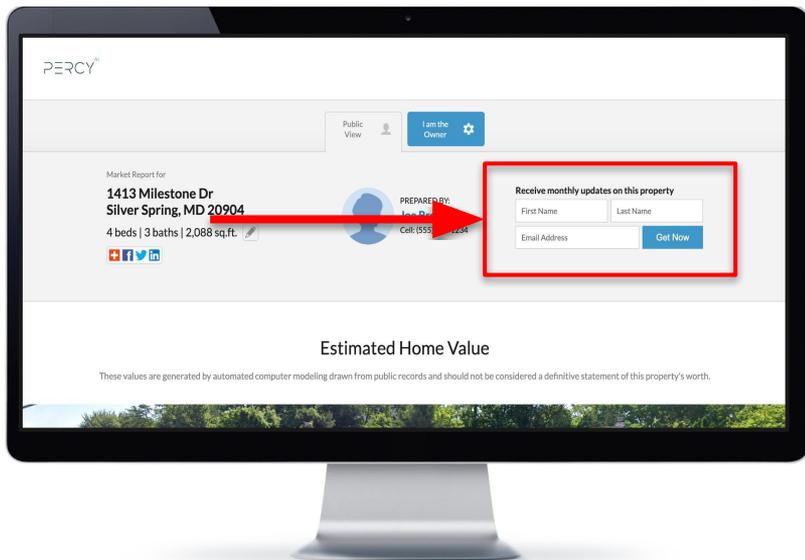


Not All Past Clients Are The Same

- Some are friends/family
- Some are folks who will do business with you again regardless if you contact them
- Some were just OK to work with
- ...etc

So what should you do, specifically?

FOR ALL “Past Clients”



Enroll Your Clients

- Type in their address
- Put in their name/email address
- Click “Get Report”

Once enrolled, their initial email will look like this

Dear Brandon,

As part of my ongoing service to you, you have been subscribed to receive a personalized monthly report containing valuable information to empower you to make smarter financial decisions when it comes to your home at [4611 Ayron Ter in Palm Harbor, FL](#)

This report will show you multiple valuations, market trends, activity around your home and much more.

We are here if you have any questions about your home.

[View your Monthly Report](#)



Brandon Carroll

PERCY REALTY

P: [\(213\) 123-4567](tel:(213)123-4567) | [MESSAGE ME](#)

High Engagement

- Personalized email related to their home
- 70% opens
- 50% click throughs
- Happy responses

And then every month, they will receive this

PERCY^{AI}

Dear Brandon,

Your Report for 4611 Ayron Ter is ready!

Your home's value may have changed recently. Check it out now.

[VIEW REPORT](#)

What you'll get in the report

- ✓ Changes in your home's value
- ✓ Recent nearby sales
- ✓ Buyer demand in your market

Real Estate



Brandon Carroll

brandon+demo@percy.ai

123-456-7890

Automated on your behalf

- Personalized email related to their home
- Sent every month
- 70% opens
- 50% click throughs

But, seriously...

Enroll your past clients (manual)



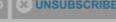
I promise you this works!

- Get a spreadsheet with the name, email, and address of your past clients
- Go to your site, type in the address, enroll your past client
- Reload your site
- Repeat until complete!

Demo of website enrollment

Option 2: In App (automated)

Must be turned on via a request FROM your Brokerage Leadership

Download All Results		Download Avery Labels		Download Valuation Attempts		Import Subscriptions	
My Leads (39)		Lead Type All (39)	Receiving Monthly Reports All (2)	Claimed a Property All (39)	Sent an Inquiry All (39)		
NAME / EMAIL	OWNER NAME	ADDRESS	LAST REPORT ACTIVITY		VALUATIONS	ACTIONS	
1  No name provided 6/16/23 @ 2:41am	Compton Matthew Andrew	 42 Golf Dr Aliso Viejo, CA 92656 6/16/23 2:41am	 MONTHLY	 INQUIRY	 CLAIMED	 R \$1,541,000 +2	ARCHIVE ASSIGN TO AGENT
2  No name provided 6/6/23 @ 8:32pm	Clements Stephen C	 45 Golf Dr Aliso Viejo, CA 92656 6/6/23 8:32pm	 MONTHLY	 INQUIRY	 CLAIMED	 R \$1,479,000 +2	ARCHIVE ASSIGN TO AGENT
3  No name provided 5/12/23 @ 11:28am	Merriman John	 15 Shane Ct Dillon, CO 80435 5/12/23 11:28am	 MONTHLY	 INQUIRY	 CLAIMED	 R \$1,814,000 +2	ARCHIVE ASSIGN TO AGENT
4  No name provided 5/12/23 @ 11:24am	Richardson Kenn	 12503 Cherry St Thornton, CO 80241 5/12/23 11:24am	 MONTHLY	 INQUIRY	 CLAIMED	 R \$603,000 +2	ARCHIVE ASSIGN TO AGENT
5  test test (Mortgage) preeti@getbyside.com 1231231234	FUNK,JORDAN	 45 Gema San Clemente, CA 92672 5/11/23 3:38pm	 MONTHLY 5/11/23 3:38pm	 INQUIRY 5/11/23 3:38pm	 CLAIMED  UNSUBSCRIBE	 R \$1,168,000 +2	ARCHIVE CREATE BMA ASSIGN TO AGENT

Demo of in app import

Now the fun part....what do you do once they are enrolled?

Remember this image?



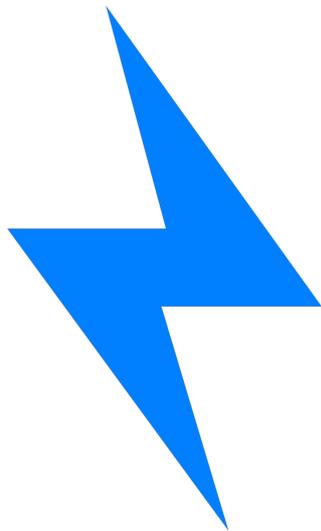
The Past Client System



Not All Past Clients Are The Same

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- ...etc

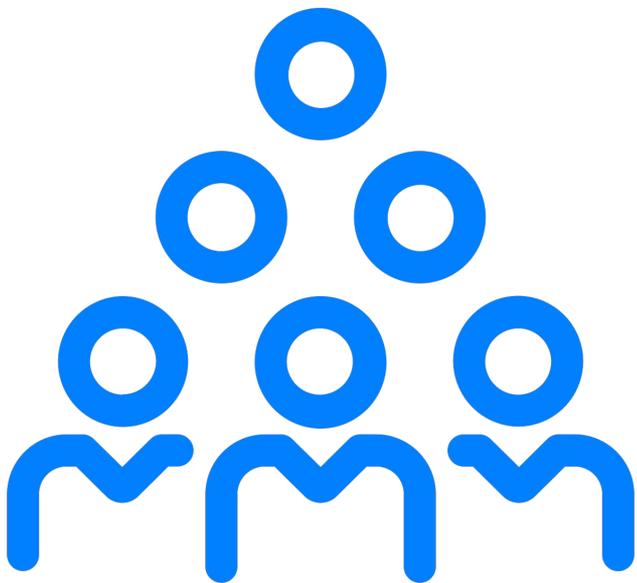
Strategy: Top Clients



Top 25% of Past Clients

- Buy a personalized gift once a year
- Engage regularly (4x/yr), on a personalized level
- Enroll in the monthly report
- Call them to discuss the report
- Look at their report; proactively provide additional context
- Run a CMA with the report to provide even more guidance

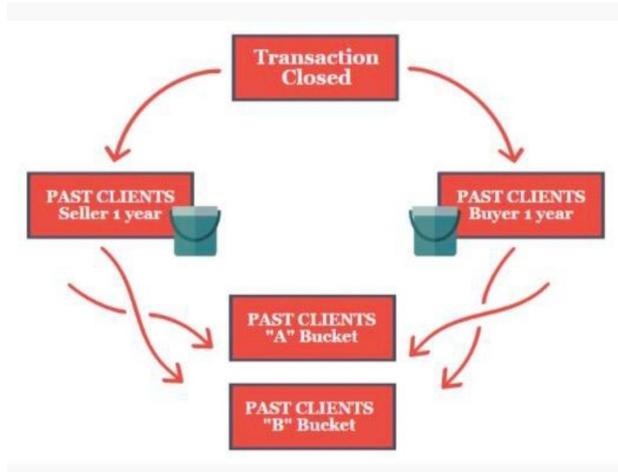
Strategy: Everyone Else



Final 75% of Past Clients

- Enroll in the monthly report
- Engage personally 2x/year
- Look at their report; proactively provide additional context
- Run a CMA with the report to provide even more guidance

Strategy: 1st Year Referral



After First Year (Post Close)

- Touch base with all of them on a regular cadence
- Check in on their home experience
- Recommend local events
- Enroll them in the Monthly Home Valuation
- Send them a monthly neighborhood report
- Ask them for a referral
- Give them 1 year anniversary gift
- Decide on cadence on follow up after that

“I have an idea I want to run by you.”

“I have an idea I want to run by you”



Research their reports

- Recommend upsizing/downsizing
- Help them understand areas they can invest in and why
- Run a model for AirBnB income for an investment property
- USE the report to help you spark a conversation

DEMO

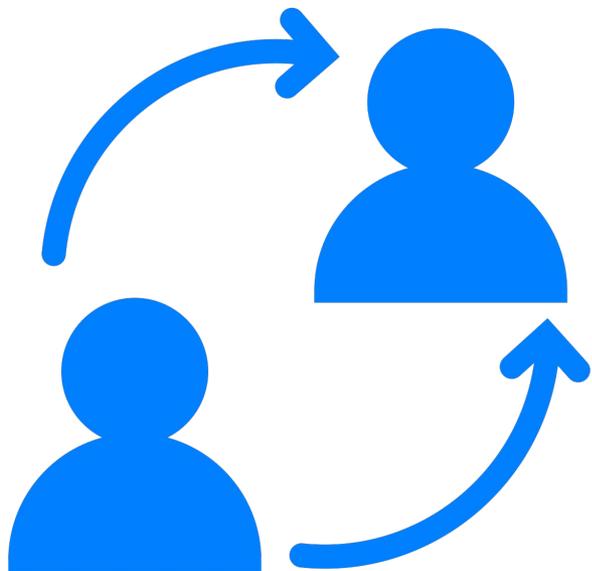
ANY QUESTIONS?



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Asking for Referrals: Best Practices



Get more monthly subscribers

- Send a personal email to your past clients if they know anyone else who would benefit from the report
- Call your best past clients and ask the same question
- Even better, have someone already in mind and ask them to facilitate an intro
- EVEN BETTER, give them a template they can copy/paste to email to someone else.



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Summary

- Big trends amongst Brokerages + Realtors on “Clients for Life” initiatives.
- 89% of buyers would use their agent again or recommend their agent to others; only 18% work with their agent again when it’s time to sell.
- We treat leads differently than past clients, and we shouldn’t!
- When we are not engaging with past clients regularly, their relationships decay and agents are no longer top of mind
- Me vs. You Marketing. Focus on **You** Marketing
- Not all Past Clients are the same; treat them differently depending on how much they can help your business.
- The Home Valuation is a great tool to use for referrals, too.

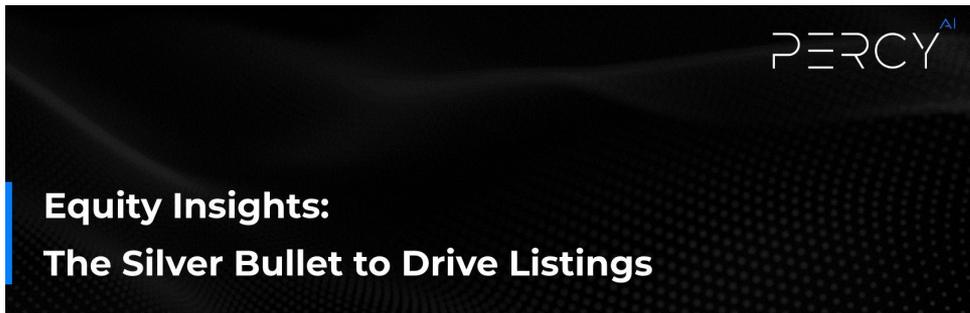


Next Steps

- **Enroll ALL Past Clients** to receive a monthly report
- Literally, take a **spreadsheet out and enroll them one by one**
- **Research the reports from your best past clients;** proactively provide additional context
- **Run a CMA** with the report to provide even more guidance
- **Top 25% of Past Clients:** Engage 4x/yr, on a personal level
- **Next 75% of Past Clients:** Engage 2x/yr, on a personal level
- Leverage “I have an idea I want to run by you.”
 - Investment opportunities
 - Upsizing/downsizing
 - Leveraging positive equity



Coming Up! *Friday, October 5th @ 1 pm ET*



Presented by:

Brandon Carroll
Vice President, Client Success
brandon@percy.ai

Equity Insights: The Silver Bullet to Drive Listings

Hosted by:
Brandon Carroll,
Percy Vice President - Client Success

ANY FINAL QUESTIONS?

PERCY^{AI}

WE VALUE YOUR PARTNERSHIP.