



# A REAL ESTATE BROKER'S GUIDE TO ENTREPRENEURIAL SUCCESS

**TAKE A LOOK AT  
YOUR FUTURE**

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**By Chris McAllister**

Founder / President / Real Estate Brands Ltd.

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## Thank You!

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**Thank you to everyone at ROOST Real Estate Co.  
that made our success possible and our clients  
and business partners that have supported our  
growth and mission.**

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# PREFACE

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The purpose of this book is to help the owners of real estate brokerages realize the full potential of their businesses. Real estate brokerages are being hit from all sides. The internet, while vastly improving our productivity, has also empowered buyers, sellers, and individual agents with enough knowledge to become a danger to themselves and others. The ultimate effect of Zillow, HGTV, and the rest has been to commoditize our business in the eyes of our customers.

The advent of the agent 'team concept' has created mini-brokerages within brokerages with none of the risk and liability the broker owner incurs. Franchise companies are primarily focused on two things, agent recruiting, and selling more franchises. Franchises, which in most cases began as platforms to support broker owners and their businesses, have become little more than a means of supporting the quarterly goals of very large public companies.

Many of our fellow broker owners have devalued their businesses, and by extension, our businesses, by resorting to limited service and discount listing options that have severely impacted profitability for all. Worse, many brokerages have so devalued their service to individual licensees that they operate with fee structures that favor the agent over the health of the brokerage. In both situations, we have been in a race to the bottom with our competitors for many years.

This book is for the entrepreneurs that chose real estate as their means of making a difference in the world. This book is for the real estate broker owner that is not afraid to earn a return on his or her investment, and for whom profit is not a dirty word. This book is for the broker owner who wants to differentiate themselves in a world that sees us more and more as all the same. This book is for the broker owner who refuses to become a commodity and seeks to differentiate themselves through dedicated service and results. This book is about leading, not about following.

I have been a real estate agent since February 2001. I opened my first RE/MAX franchise in early 2003. I closed my RE/MAX offices and

filed bankruptcy after the crash in 2009. I spent a few years running my office in association with a local firm and began researching franchises again in late 2012. I soon figured out that another franchise relationship was not going to work for me.

**Not a single franchisor I interviewed shared my bedrock personal and business values. My 'non-negotiables' include:**

- Working by referral.
- Providing more value than I am often initially paid for.
- Support for continuously expanding my skills and capabilities.
- The belief that relationships are infinitely more valuable than transactions.
- The joy of consistent processes and doing the work of serving my clients.
- The intentional application of my unique talents and abilities, and those of everyone I work with.

These 'non-negotiables', or 'mindsets' if you will, have been the foundation of all of my successes. The times in my life when things have gone off the rails are the times when I lost focus on who I am and what I believe at my core. I did not grow up dreaming of becoming a real estate broker. Becoming an entrepreneur at all was never on my radar until I turned 40 years old. However, the real estate business has provided me a tremendous opportunity to do what I do best and make a positive difference in the lives of my clients and my team.

My goal became to create a real estate company that I wanted to work for. I wanted to create a company that reflected my values and aspirations. I have been on this journey going on five years now, long enough to know I am on the right track. I consider Real Estate Brands Ltd, to be my life's work.

Some might argue that it is presumptuous of me to think that after only five years that I have anything to say that will be of value to my peers. I look at it that we all have to start somewhere and while my story may not gain universal acclaim or acceptance, I know there are people out there that share my sensibilities. Most importantly, I know there are hundreds if not thousands of broker owners in our industry looking for a better way. I hope this book inspires a path and a plan of action for anyone who cares to read it through.

# INTRODUCTION

# WHAT THIS BOOK IS ABOUT

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## **This book is made up of three main parts.**

The first part is about The Client Experience. The Client Experience is what sets ROOST Real Estate Co. and Lucky Town Real Estate Co. apart in the market. The Client Experience is often aspirational in nature. We are constantly striving to create new and innovative ways to win customers over as clients and keep them as clients for life.

The second part of this book is about The Agent Experience. How do we go about creating a business platform and home for agents that adapts to their needs over the course of a career? Just as our goal for The Client Experience is to create Clients for Life, so is our goal for The Agent Experience to maintain our agent relationships for life. In other words, we aspire to be the only brokerage our agents will every need.

The final main thrust of this book is The Broker Experience and our laser like focus on Broker Profitability. It is my position that the broker owner is the link in real estate brokerage chain that has been left behind. It is the entrepreneur, the risk taker, the transformer of scarce resources into a scalable and sustainable business, who deserves the preponderance of our support and gratitude.



# THE CLIENT EXPERIENCE

# PART 1: THE CLIENT EXPERIENCE

## **Relationships vs. Transactions**

Back in the day when dinosaurs roamed the earth, real estate brokers literally had the only keys to all the houses for sale in their market. There was no internet back in the day. There were MLS 'books' of listings that brokers had exclusive access to. Information about listings was strategically disseminated in the local newspaper or real estate marketing magazine.

When you were part of an exclusive club – the local board of Realtors - that controlled all the information about the listings in your market, you could afford to run a transaction based business. I am sure many veterans would argue this point but let's be real, the business was vastly simpler than it is today, if not easier. Buyers had to go through a broker who was a Realtor to get information about houses for sale in the area. There was no other way.

Fast forward to today, and the world of real estate has changed dramatically. Brokers no longer hold the keys to the kingdom. Zillow, Realtor.com, HGTV and the rest have given light and life to what was privileged information. This information revolution resulted in a lot of dead dinosaurs.

While many of the industry's former leaders were left behind by technology, a few insightful veterans and new licensees, realized they had to approach the business from a new perspective. That perspective had to include building productive relationships with clients and continuously adding more and more value to the client experience. In short, the successful among us became passionate advocates for, and partners with, our clients.



## Working by Referral

Working by referral is the essence of our company. As I discussed in my previous book *A Real Estate Agent's Guide to the Good Life*, early on in my career I realized it was going to be much easier (and less stressful) to take the long view for my business and create advocates for my services and expertise.

During my first year as an agent I discovered Top Producer. At the time this was the premier real estate tool for keeping track of client information and staying in touch. It came with templates for different letters and marketing campaigns. It helped me leapfrog far more experienced agents in my office in terms of both sales and productivity.

Top Producer also made me wonder why my brokers did not run the entire office around these basic principles. I was still pretty naïve about the whole independent contractor / broker relationship back then – but still I could not shake the intuition that there had to be a better way to run a brokerage.

Later in my career as a RE/MAX franchisee I was introduced to Buffini and Company. ([www.buffiniandcompany.com](http://www.buffiniandcompany.com)) Buffini and Company is a real estate coaching company that champions systems for working by referral. When I brought their 100 Days to Greatness training program, now called Peak Producers, to the agents in my office, I began to envision a real estate office environment where working by referral was an integral part of the DNA.

I soon found that only a small percentage of my agents were willing to commit to the work and the processes that working by referral entails. After all, taking the long view is not always conducive to making next month's mortgage payment. Nevertheless, the agents who did embrace the concepts were by far the most productive agents in my office. They were also the ones who required very little of my time.

I started to dream about what my life would be like if the only agents I employed were agents who wanted to work by referral. What if we built a company around agents that shared my philosophy? We may not have the largest firm in town in terms of agent count, but we would likely be the most productive, and dare I dream, the happiest?

Building a company around ongoing productive relationships with our biggest fans seemed like a no-brainer to me. The icing on the cake was creating over time a predictable, sustainable, and even steadily increasing income stream. Working by referral is the first step to a profitable brokerage.

## **Avoiding the Commoditization Trap**

One of my ongoing motivations for creating a real estate brokerage platform centered on the needs and desires of our clients is to avoid the commoditization that is sweeping our industry. Increasingly, customers and prospective clients view all real estate professionals as being alike. Consequently, many broker owners feel the only way they can survive is to cut their commissions and fees and try to compete on price. Personally, I am not interested in a pay cut.

One way to avoid the trap is to package our unique methods and processes in a fashion that authentically speaks to our desired clients. The second way is to cultivate ongoing relationships with clients where the value they receive from the service, information, and ongoing counsel we provide exceeds their expectations. The way to accomplish these twin strategies is to create a brand that communicates our unique place in the industry.

According to the American Marketing Association Dictionary, a 'brand' by definition is a "name, term, design, symbol, or other feature that distinguishes one seller's product from those of others." What sets the most successful brands apart however, is a set of documented unique methods and processes that result in

a consistent and satisfying client experience.

One of the best known examples of a successful brand is McDonald's. Not only is the brand ubiquitous and instantly recognizable, we know intuitively what it stands for. One of the pillars of the McDonald's brand is serving consistent tasting food in thousands of restaurants all over the world. They do this through detailed unique methods and processes that each and every restaurant must adhere to. They begin the indoctrination process with new franchisees and managers at their famous Hamburger University.

Training and ongoing support is the center piece of all great brands and franchise operations. Training and support is the center piece of our brand as well. We ask our broker owners and managers to become Buffini and Company Certified Mentors so that they can facilitate the twelve week Peak Producer training program for new and experienced agents alike. This is the first step in our indoctrination process for our agents.

There is one glaring difference between a business like McDonald's and a real estate brokerage. Every person who works at McDonald's is an employee that receives a W2 at the end of the year. The majority of the people who work for a real estate brokerage like ours are independent contractors who receive a 1099 at the end of the year.

Most broker owners and real estate franchise operators use this as an excuse to avoid the hard work of creating a culture that both embodies and celebrates the core values we espouse. Just because we have no formal 'control' over our agents as traditional employers does not mean our agents will not adopt the core values and beliefs that are the basis of our unique methods and processes. In my experience, an independent contractor, completely responsible for their personal income and well-being, will be a far more passionate evangelist for their company's products and services than a 9 to 5 employee who simply needs a job.

I see the traditional independent contractor relationship we broker owners have with our agents as a source of great strength when it comes to building and expanding our brand. Our very best agents believe in our mission as much as I do. It goes without saying that we are 100% dependent on our agents to ensure a unique, consistent, and successful client experience.

Obviously not every licensee in the world is a good fit for our company. There may be only a few thousand agents across the United States that share our core beliefs and values. We are not a body shop. We are a premium brand that only desires to support and serve the agents that leverage the business platform and strategies we provide to the maximum possible benefit. We are looking for agents with a business owner mentality that are experts at helping people buy and sell houses.

## **From Listing Focused to Client Obsessed**

Many brokers believe that listings are the life blood of the real estate business. I agree that listings are critically important to a firm's financial health. However, I think these brokers came to this belief in the days when they controlled all the information about, and access to, houses for sale in the market. These days, with the ascension of Zillow and Realtor.com as the preferred shopping platforms for home buyers, the firm with the sign in the yard matters less and less.

Let's face it, on the internet, houses are houses. The size of the listing firm and the market share they enjoy are of little consequence to a home buyer. They want the house that works for them. They could care less whose sign is in the yard. In contrast to someone who is obsessed with Mercedes Benz cars and who will only buy a Mercedes Benz product, nobody is going to restrict themselves to only buying a house listed with a specific real estate firm.

They may however, only choose to buy a house with the assistance of a ROOST Real Estate Co. professional whom they

have a relationship with. Or, they may seek out a relationship with a ROOST Real Estate Co. professional because the brand promise resonates with their personal sensibilities and desire for a successful purchase or sale. In either case, making the sale had nothing to do with which firm's sign was in the yard.

From a firm's cash flow perspective, list side commissions matter. However, in the age of compressed commissions, they are of no more value, and often of less value, than a buy side commission. This fact further confirms my thesis that in the real estate world of today, the ability to create long term value-added relationships that generate referrals, is infinitely more valuable than any number of listings.

Listings are the natural byproduct of working by referral. They are far more often the *result* of a relationship rather than the cause of one. I will further postulate that a brokerage or agent obsessed with listings is too often obsessed with earning both sides of the commission. There is nothing wrong with earning both sides of a commission provided it occurs as a natural consequence of meeting the needs and exceeding the expectations of both your buyer and your seller. Double popping a listing should be the result of an agent's obsession with the needs of their client, not simply greed.

A focus on listings is the result of a transaction based mindset rather than a relationship based mindset. The current environment in 2017 is that we have more buyers than listings to sell. The scarcity mentality that is infecting so many markets right now is resulting in a proliferation of 'pocket listings' and off-market 'coming soon' listings, that in my opinion, further devalue our profession in the eyes of the public. The market will turn again and I believe Karma is a bitch. The congregation may be seated.

## **The Times They Are a Changin'**

The Baby Boomers, the great demographic wave of people born between 1946 and 1964 totaled 77 million people. Following them was the cohort dubbed Generation X, people born between the mid 1960's and early 1980's. The size of both of these demographic groups are eclipsed by the Millennials.

The Millennials, born between the early 1980's and 2000, total 82 million people in the United States alone. Coming in fast right after the Millennials is Generation Z, people born at the turn of the century and rapidly coming of age today.

Since 2007 the number of young people between the ages of 15 and 34 living at home has grown dramatically. In addition, the number of unmarried couples has grown and the birthrate has dropped. These trends will not last as the economy continues to improve. The inevitable outcome over the next few years is that household formation will explode. We want to be ready to help these people rent, buy, and sell houses.

ROOST Real Estate Co. was founded by a baby boomer with the help of a marketing and branding expert born in 1978. Together we worked to create a brand that would resonate with young and old alike. Truth be told however, our goal was to build a brand that appealed first and foremost to Millennials and Generation Z.

So what does a young person want today when it comes to buying or renting a place of their own? To answer that question we need to understand the shared experiences of these two groups. There are a few distinctions between the life experiences of Millennials and members of Generation Z, but there are far more similarities.

Millennials started life before cell phones and the internet became ubiquitous. Generation Z never experienced a world in which they were not fully interconnected. The Millennials, like my two daughters, grew up watching VHS tapes of Disney

classics. Children today watch Disney movies downloaded to a tablet.

Millennials watched 9/11 happen in real time while Generation Z has only known the aftermath. The Millennials personally experienced the devastating effects of the great recession, while the younger cohort of Generation Z bore witness as their families struggled. For both groups, economic struggle has left a lasting impression.

Based on my personal research and experience, what young people today really want is a collaborative experience. The last thing they want is to be told what to do, but they do not want to make a mistake either. They want to be delighted and at the center of every experience.

They are obviously tech savvy, but in ways foreign to older people like myself. Everything in their life has to work like an app on their smart phone. They value seamless and smooth experiences that 'just work'.

In terms of purchasing, they value transparency in pricing and they have little desire to barter. They have no taste for an extended negotiation process. Young people today will not tolerate pricing that is vague, aggressive sales techniques, or an absence of technology. They expect every experience to be like shopping with Amazon Prime, clear, easy, dependable and hassle-free.

This explains the popularity of Zillow and their Zestimates. It also explains why over-pricing a home because 'everyone wants to negotiate' is not the optimum strategy for positioning a piece of property on the market anymore. Young people want information, they want to know the 'why' of a situation, and they expect to be empowered.

All of these obstacles to connecting with these cohorts in reality are tremendous opportunities for the real estate firm of today and tomorrow. We as agents and brokers have to adapt or die.

According to the National Association of Realtors, the average age of a Realtor is 53 years old. We truly have a generation gap in our industry that we must bridge. In the immortal words of one of the greatest baby boomers who ever lived, Bob Dylan, “The times they are a changin’.”

Our tag line for ROOST Real Estate Co, is “For the way you want to live today.” We strive to create a warm and welcoming environment whether virtually or in person. Our goal from the start was to create a brand that would follow a person from the time they rent their first apartment, to their first home purchase, subsequent home purchases and investments, and finally their retirement villa on the beach.

Smart, Passionate, Approachable, and Supportive are the key attributes of the ROOST Real Estate Co. brand. Our mission is to simplify the complexities of renting, buying, and investing in real estate. We are approachable, informative, and generally more relaxed in our approach to collaborating with our clients. We help our clients eliminate dangers, capture opportunities, and maximize their strengths.

Our clients are from all walks of life and economic backgrounds. We strive to provide each and every one with a positive brand experience that brings them, and their friends and family, back time and time again. We value transparency, authenticity, and collaboration, just as our target clients do. We don’t hide our cards. We don’t play it cool. We aspire to be understood and accessible. We want our clients to feel safe and armed with the information they need to make informed decisions about their real estate needs.

## **Property Management - A Point of Differentiation**

In any given market, roughly 60% to 65% of the people live in a home they own. That means at least 35% to 40% live in homes they don’t own. Why do the vast majority of brokerages only elect to serve barely two thirds of the population? What



about the other 35% to 40% of the people that still need a roof over their heads?

Offering real estate services to all of the people that need a roof over their heads is a key point of differentiation for us. It always struck me as odd that virtually everyone I met in this business looked down their noses at property management. I discovered the same attitude towards working with banks to sell their REO listings and thought that was odd too. In both cases I created very impressive streams of income providing services others felt were beneath them.

I am going to discuss property management services as it pertains to broker owner profitability in Part #3 of this book. The point I want to make here is that there is great synergy in bringing the sale and management of real estate under one roof. The reason this synergy exists is because most real estate investors will regularly expand their portfolio if they have reliable professional management in place. The relationships we have with our property management clients are some of the most profitable we have.

Property owners also look to professional property management providers when they find themselves in an “accidental landlord” situation. Sometimes people want to move, but they don’t want to sell their existing property. Sometimes people inherit property that they want to hold on to. These investor / property owners often become sellers in the future and they will turn to us to list their property. In the meantime, we are happy to manage their property for them.

Renting a house versus buying is a prudent lifestyle and financial choice for many people for a thousand different reasons. Many people move in and out of ownership throughout their lives as their personal circumstances change. Young people moving out of their parents’ homes almost always rent for a number of years before making their first home purchase. We want to help all of these people find the rental property they need today, and be there for them tomorrow when it’s time for them to buy.

## **Client Touch Points**

One of the five aspirations I have for our company is to be the most referred real estate brand in the land. (I will discuss all five aspirations in detail in Part #3 of this book.) For now, suffice it to say that only by breaking down and improving every detail of every possible brand interaction, will we be able to connect on a level that creates a client for life. This is an ambitious agenda that we will tackle one step at a time. It all starts with an awareness of client touch points.

A client touch point is simply any opportunity to make a connection with someone. There are a myriad of opportunities to make a great first impression, and even more opportunities to build upon that initial encounter. As an example, I have divided the client touch points that occur throughout the home purchase experience into four phases, pre-sale, home shopping, contract to closing, and post-closing. Each of these four phases are divided into three subcategories that track the arc of the home purchase process.

The Pre-Sale phase of the process starts with the inkling that maybe a new house is a possibility. This inkling is reinforced by a new awareness of all sorts of real estate related marketing and advertising cues that reinforce the notion and prompt some initial action. The initial action may include internet searches and even a visit to an open house or two. As the pre-sale phase proceeds, we have an opportunity to win the business as the prospective buyer begins consulting family and friends for referrals to a Realtor.

Assuming the Pre-Sale phase results in a referral, the home buying experience moves to the Home Shopping phase. This phase is all about identifying and championing the needs of the client. The best way to kick this process into high gear and create a client for life is to schedule a one on one meeting with the buyer(s). I have become a bit of a fanatic about this but I will not work with a buyer in any capacity until they agree to meet with me in my office for a consultation that lasts less than one hour.

# HOME BUYER TOUCH POINTS

PRE-SALE	HOME SHOPPING	CONTRACT TO CLOSING	POST-CLOSING
Is a New Home In My Future?	Identifying Customer Needs	Keep Your Promises	Home Delivery
Aware of the possibility	Buyer Meeting	Validate purchase	Keys / Garage Door Openers
Direct Mail Arounds	Researching values on line.	Inspections	Possession
Social Media	Making decisions based on pictures.	Post Inspection Negotiations	Facebook Post
Yard Signs	Clear on why now is the time to buy.	Family interaction / interference	
Economic News	Meet a lender	Address Doubts	
Research	Get pre-qualified for a mortgage.	Existing Home Sale	
Word of Mouth	Obtain Market Analysis of Current Home	Ongoing status up-dates.	
Past experience good or bad.			
Business cards			
See agent at the mall, social events, kid's sports etc			
CHECKING US OUT	CHAMPION CUSTOMER NEEDS	LOAN COMMITMENT	POST-CLOSE SERVICE
Realtor.com / Zillow / Other Site Visits	Process of Elimination	Appraisal	Agent Follow-Up
Visit Open Houses	Confirmation of price, location, condition.	Pre-Approval	Pop-Bye with thank you gift.
Google Search	Doing drive by's	Underwriting	Contractor Directory
Visit Firm / Agent Websites	Accepting market conditions.	Clear to Close	Available to answer questions
Visit Lender Websites	Forever house vs. Next House	Review Closing Disclosure	
Research the process - how to start	Seeing houses with Realtor		
WIN THE BUSINESS	WRITING A PURCHASE OFFER	CLOSING / FUNDING	CREATE LASTING MEMORIES
Inquire of friends and family	Crafting an offer	Exact Down payment Required at closing	Monthly Item of Value
Seek referrals	Negotiation	Scheduling Closing	Referral Generation
Contact lender.	Losing a house due to low offer	Setting expectations	
Educate themselves	Making another offer	Roundtable Closing	
Make contact with an Agent / Email, Phone, Text	DotLoop	Occupancy	
Revisit firm / agent websites.		Greeted on Arrival	
Agree to first initial buyer meeting.			
Complete the Happy Home Buyer Scorecard			

During this meeting, my goal is to find out what is the most important thing to them about this move. I want to know what kind of property they have in mind and I want to know how we are going to collaborate to reach their goals. I take them through the entire process step by step and I end the meeting by logging onto the Multiple Listing Service together so they can see exactly what I see.

The home shopping phase ends with identifying the perfect house and negotiating a contract.

This leads us to the Contract to Closing phase where our client service skills are on full display. We all know that finding a home and getting it under contract is only half the battle, getting to the closing table is where the true professionals shine. The key to this phase of the home buying experience is to keep our promise to get our buyers into the house they were so excited about at our first meeting. That is what they hired us to do in the first place.

This phase also introduces other people and vendors into the process that we have no direct control over. We may have the opportunity to recommend lenders, title professionals, home inspectors, and other service providers we know and trust to our clients, but we still have no direct control over the outcome. We can however manage our client's expectations and let them know exactly what to anticipate. Communication during this phase is critical. We literally cannot communicate enough with our clients during this phase of the experience.

The Post Closing phase is critical to cementing the relationship we have worked so hard to cultivate and to create a client and a referral partner for life. Our role here is to be available to answer any questions or concerns that come up after the sale. The new home owners will want to make their new house their own and may need referrals to contractors and skilled trades people. They will be entered into our Client Appreciation Program and can expect an item of value in the mail each month and of course, the periodic pop-by gift and personal note.

I in no way wish to imply that this is an exhaustive list of all the possible client touch points that make up the home purchase process. I am sure that you, dear reader, have already added to the list. So, while the list above is certainly not exhaustive, it goes a long way towards identifying the *high-value* touch points and those *moments of truth* where a situation can break against us.

### **Moments of Truth**

A moment of truth can easily turn into an obstacle and a 'pain point' for a potential client. Gaps in our understanding of what a client really wants, brand 'misses' where we fail to execute as promised, or a failure to acknowledge what a client might be feeling, are just three common challenges that interfere with the desired brand experience. Our ability to solicit feedback along the way, rapidly resolve conflicts, and address concerns in real time all go a long way towards countering the inevitable misstep.

Moments of truth are our big opportunities to demonstrate the value we add to the client / professional relationship. Making a situation 'right' with a client usually carries the day, and if done with integrity and authenticity, creates an emotionally engaging experience. Moments of truth give us a chance to show that we are accountable to both the client and our brand promise. They are opportunities for connection.

I cannot stress enough how important an awareness of client touch points, pain points, and high value moments are to the success of a real estate professional. Awareness is the first step to vastly improved customer service and the ability to attract clients and advocates for life. Once we become aware of the possibilities for connection that are really right under our noses, we can begin an analysis and an action plan for making the most of each opportunity.

## Marketing and Advertising

The home purchase process is just one part of the business of running a brokerage. There are completely different sets of client touch points for the home selling process, working with investors, tenants, and the agent recruiting and retention experience. Client touch points inform all of our virtual and face to face encounters with customers and future clients.

We continuously refine our brand content and unique methods and processes to capitalize on client touch point opportunities. The results of this ongoing systematic review are reflected in our approach to marketing, advertising and personal interactions. The process will never be complete because it is what differentiates our brand. This is how we roll.

Client touch points help us establish the consistent experiences our clients desire. We are driven by the goals, needs, thoughts, and emotions that motivate our clients to make some of the biggest financial decisions of their lives. Two good examples of how our approach to working with clients has been influenced by our awareness of client touch points are our List With ROOST™ and our Buy With ROOST™ presentations and brochures.

**Buy with ROOST™** consists of nine short sections and forms the agenda of the first buyer consultation. These parts include The First Meeting, Agency Law, My Services are FREE, Helping You Find Your Perfect Home, Viewing Homes, Getting Pre-Approved for a Mortgage, Making an Offer, Contingencies and Inspections, Contract to Closing and Our Commitment to you.



**List with ROOST™** is designed to take a home seller through all the phases of the home selling process from getting the house ready to show, marketing, how we communicate, negotiating and structuring the sale, managing the transaction, the market analysis and of course, our Client Appreciation Program.



The brochure is designed as a listing presentation tool that is left with the seller so they can refer to it after the initial listing consultation. Using the talking points in the brochure, and setting the proper expectations up front, goes a long way towards ensuring a superior selling experience. It also tends to diffuse any potential conversations about our fees. Once the seller realizes everything we do for them, they are less likely to want to negotiate our commission.

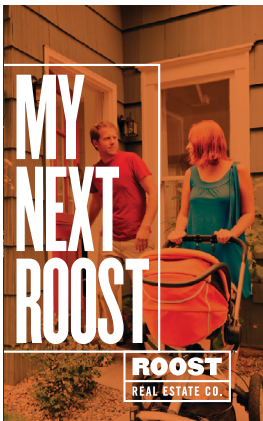
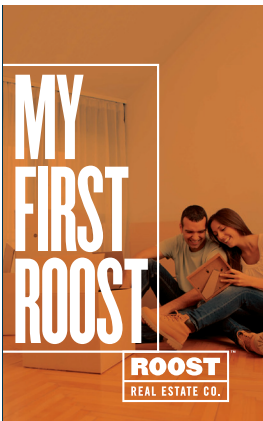
### **Additional Brochures and Content**

**My First ROOST™** is a comprehensive education and buyer representation experience that ensures first time buyers have the information they need to make informed purchase decisions that will fulfill their immediate desires and benefit them financially over the long run. Buying a home is the largest financial decision people make in their lifetimes. It is a momentous life event and we want to be there with them every step of the way.

The **My Next ROOST™** speaks directly to the opportunity to get a client from the house they currently own and into a new home.

The client touch points we have identified in our work with real estate investors and landlords have informed the processes we follow in our property management division too. **Rent With ROOST™** outlines the experience our tenants can expect when they rent from ROOST.

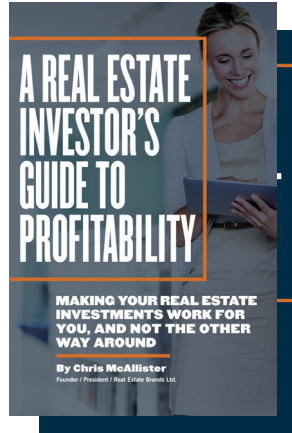
**Manage with ROOST** details how we work with our landlord clients.





## A Real Estate Broker's Guide to Entrepreneurial Success

I have also written a book called *A Real Estate Investor's Guide to Profitability – Making Your Real Estate Investments Work for You, And Not the Other Way Around* that has become a key advertising and marketing tool for expanding our property management business.



We also took some of the content from *A Real Estate Investor's Guide to Profitability* and created a large form brochure that we give to prospective clients who find us through our websites.



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# FOR THE WAY YOU WANT TO LIVE TODAY™

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## **ROOST™ is a different kind of real estate company.**

Most real estate companies have two lines of business. They work with buyers and they work with sellers. At ROOST, we work with buyers and sellers too, but we also work with investors, and the people who rent from them.

Embracing 100% of all of the people who need a home, not just the 60% to 65% of the people who own real estate, creates a very different kind of Real Estate Company for our clients and for our agents.

Many people who rent their homes do so for their entire lives. Others will only rent for a few years before buying a home of their own. We help our tenant clients become home owners.

We also work closely with investors. We help investors find, evaluate, purchase, and manage investment property. By offering Property Management services to our investors, they are more comfortable buying more property.

Because we work in the property management business, we have relationships with skilled trades' people that can help all of our listing clients prepare and maintain their properties for sale.

ROOST Real Estate Co. is a referral based business. We believe that the very best clients are those that are recommended by our existing and past clients. We have a referral based marketing system that keeps ROOST Real Estate Co. top of mind with everyone we work with.

Our tenants become buyers, and refer new tenants and new buyers to ROOST. Our investors become repeat buyers, referring new investors and new buyers, and new sellers to ROOST. Our buyers and sellers refer their friends, family and co-workers again and again.

We are the real estate company people turn to at every stage of their lives. We are there when our clients rent their first apartment, buy their first home, buy their first investment property, and buy their retirement villa on the beach.

This is the ROOST Real Estate Co. Smart. Passionate. Supportive. Approachable. Meeting people where they are today, and helping them get to where they want to be tomorrow.

ROOST Real Estate Co.

For the way you want to live today™.



# THE AGENT EXPERIENCE

## PART 2: THE AGENT EXPERIENCE

### **A Real Estate Agent's Guide to the Good Life**

Client touch points in the agent recruiting and retention process occur from the moment an agent becomes aware that we exist, and continue throughout our (hopefully) career-long association with that agent. Ideally, a prospective agent will 'discover' us through a google search, a social media post, or possibly a targeted email to a select group of agents in a given market. Our goal is make it possible for our right-fit candidates to find us. If they discover us organically, then they own the experience and it is their victory.

Our marketing plan for recruiting new agents is grounded in my 2015 book *A Real Estate Agents Guide to the Good Life – What You Should Expect from Your Brokerage*. Once I put the book out there in our primary markets and on Amazon.com, I quickly realized that getting agents to read it, even my own, was not going to be easy. Even at less than 10,000 words, it was not something very many people wanted to plow through in their spare time. I even put a free downloadable version on our website but had very few takers.

So, I had the bright idea that I would break the book down into weekly, easily digestible bite-size pieces and release it weekly on social media. Our social media partners, Levi and Shayna Wiggins, suggested that we also create short weekly videos to complement the blog posts. I re-wrote the book during the summer and fall of 2016 as a series of 48 blog posts. Levi and Shayna further edited my work down to 60 to 90 second scripts, then created, and narrated, 48 animated videos.



The videos are very simple, but hold the viewer's attention in such a way that 60 to 90 seconds flies by. All of the videos are available on our CareerWithROOST.com blog and on the website GoodLife4Realtors.com, and our YouTube channel. We will continue to update and reposition the content annually to keep weekly communication fresh and to catch new eyes over time. This is one way we are creating client touch points on line and new opportunities to make connections.

We also created a series of 12 recruiting post cards featuring our agents and key points from the book. We mail these to our recruiting ‘hit-lists’ in each market we operate in. We use the same content to create emails that we send out monthly to a broader group of local Realtors. Here are two examples.



**THE GOOD LIFE**

**ROOST**  
REAL ESTATE CO.

**CAREER WITH ROOST**

**A Real Estate Agents Guide to the Good Life**

Nobody is under more pressure in the real estate industry than you. Realtors like you are getting hit from all sides. It seems like everyone has their hand in your pocket. Even your broker is struggling to make sense of it all. What can you do? Take a look at my new E-book, *A Real Estate Agent's Guide to the Good Life—A Blueprint of What to Expect from Your Broker*. It just might help you find the answers.

Log on to our website and download my new E-Book. It's free.

**Chris McAllister**  
Chris@ROOSTRealEstateCo.com  
844.806.6577

[www.CareerWithROOST.com](http://www.CareerWithROOST.com)



**HEROES WANTED**

**ROOST**  
REAL ESTATE CO.

**CAREER WITH ROOST**

**Join the ROOST team and find the opportunity to do what you do best.**

There is nothing more gratifying than helping somebody make a move they have been preparing their entire lives to make. ROOST is not for everyone, but for a select group of agents who want to be heroes for their clients day in and day out, the job satisfaction and the potential income are unlimited.

We invite you to explore a Career With ROOST™. Give us a shout.

**Chris McAllister**  
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937-392-3715 ext. 401

[www.CareerWithROOST.com](http://www.CareerWithROOST.com)



## **Our Best Candidates Are Referred by Our Agents**

It should come as no surprise that our best agent candidates are referred to us by our existing agents. I am always happy to schedule an appointment with almost anyone that wants to talk to us about our company, but I always ask them to read *A Real Estate Agent's Guide to the Good Life* first. Anyone who reads the book and still honors our appointment, is almost always pre-sold on what we have to offer. If the book resonated with the prospective agent at all, they want to learn more. If the book is perceived as an obstacle to whatever that agent's personal goals are, they screen themselves out.

Even if the meeting goes well there is generally a lengthy courtship process because successful agents are busy earning a living and any move, even a good move, will disrupt their business to some degree. There is also the issue of ending their relationship with their current broker. Even in less than satisfying relationships, breaking up is hard to do. That is why it is critical to keep the good will of the make or break moment / meeting alive by staying in touch online and in person.

# The Candidate Screening Process

One of the recruiting tools we have in development is called The Good Life for Realtors Mindset Scorecard®. This screening tool, available for view at <http://kys.coach/s/fJOn/GoodLife4Realtors>, is one of a series of marketing ‘scorecards’ we are developing for agents, buyers, sellers, property management clients, staff members, and prospective ROOST and Lucky Town franchisees. The beauty of the scorecard is that within ten to fifteen minutes, a prospective agent will know intuitively whether they belong with us or not. Depending on how they score, we know too.

## KNOW YOUR SCORE

### Introduction

You’ve been invited to complete the scorecard “GoodLife4Realtors” as seen below. The process should take about 15 minutes, and we recommend against closing your browser until completed.

Begin Your Scorecard

### GoodLife4Realtors

Mindsets	1	2	3	4	5	6	7	8	9	10	11	12
1 Business Owner Mentality	You see yourself as an employee that gets a 1099 at the end of the year. The fact is you don't really care for business.			You have a few basic processes in place but overall you find the business exhausting.			You are a rugged individualist in the entrepreneurial world. You do whatever it takes to get the job done.			You see owning your own business as the best path to personal fulfillment. You have a team in place that supports your goals.		
2 Continuously Adds Value	You believe that 'buyers are liars and sellers are worse'. You have to look out for yourself first.			You feel that buyers and sellers see real estate agents as being all the same. You don't know how to set yourself apart from the pack.			You are outstanding at getting transactions completed and getting clients and customers to the closing table.			You constantly strive to provide your clients more value than they pay you for. Your clients are grateful for your contributions.		
3 Trusted Advisor	Your clients think they know more about the business than you do thanks to the internet and HGTV.			You want to exceed your clients expectations and become the 'go to' expert in your market. You want to make a positive impact.			You have been at the top of your game for many years. Your reputation and status in the market win your clients over.			You approach clients with a collaborative attitude. Your client relationships are really partnerships that improve their lives.		
4 Your Pay Your Way	You feel brokers are overpaid and the value they offer is overrated. Your goal is to pay your brokerage as little as possible.			You would be happy to split your commissions with your broker if they could show you how it supports your personal business.			You pay your broker for services that make sense and support your business. You are always on guard for new fees and charges.			You believe that you and your broker need to make money. Only a healthy and profitable brokerage can support your business.		
5 The Rhythm Of Our Business	You are 100% available 24 hours a day. Holidays allow you to get a jump on the competition.			You know there has to be a better way to balance your business and personal life but there is nobody at your firm to model the way.			You do what you have to do to get ahead and stay ahead. Your family understands that your business comes first.			You know that to make a real impact you have to be at your best. You set boundaries and take the personal time you need to stay fresh.		
6 Committed to Growth	You think that real estate coaching is a scam designed to make the trainer rich.			You long for an opportunity to grow and expand your capabilities. You are burned out and tired of running in place.			You make a good living and have a comfortable life. You are doing well and see no reason to rock the boat now.			You are excited about the future of our industry and you want to stay ahead of curve. You are a leader, not a follower.		
7 Process Matters	You have no formal processes in place for working with buyers and sellers. Getting the job done is all you have time for.			Everyday is new and different. You continuously have to reinvent the wheel. You want to simplify and create structure in your business.			You have created the structures you need to run your business. Your clients are satisfied with the experience of working with you.			You find innovation as well as security in your unique processes. Your processes add tremendous value to your client relationships.		
8 Leverages the Brand	You feel that all real estate brands are the same and the only thing that matters in your business is you.			You have no idea what your firm stands for or how your broker or manager can help you. You need help but do not know where to			You wish your broker would just stay out of your way and let you do your job. Every new initiative feels like a waste of time.			You expect your broker to bring you the best practices, processes, technology and services to help you meet your goals.		
	➡➡➡			➡➡➡			➡➡➡			➡➡➡		

## The Online Agent Attraction Strategy

Our marketing funnel for attracting new agents to our company consists of four parts. They are *reach*, *engage*, *activate*, and *re-engage*. In the reach stage, we are casting the widest net to reach all possible people who self-identify as Realtors. We hope to capture their interest with our weekly recruiting videos and blog posts drawn from *A Real Estate Agent's Guide to the Good Life*. We can target our online marketing activities to specific geographic areas.

The *engage* stage involves establishing a relationship with those people whom we identified in the reach stage. They are watching our videos and following us on social media. In this stage of the marketing process, we hope to see them download a free e-book version of *A Real Estate Agent's Guide to the Good Life* from the [www.CareerWithROOST.com](http://www.CareerWithROOST.com) website.

In the *activate* stage, we hope to be communicating directly with Realtors looking for a new brokerage. These people will be our best qualified prospects and we hope to engage them through the GoodLife4Realtors scorecard, and hopefully a phone call, and even a meeting. At this stage, we want to mail them a free paperback copy of *A Real Estate Agent's Guide to the Good Life*, and a piece of swag like a t-shirt or mug. As an additional inducement down the line, we will mail them a copy *A Real Estate Investor's Guide to Profitability*.

At this point we hope to seal the deal with the prospect joining our company. However, timing is everything and sometimes the courtship process is longer than we would like. The 're-engage' stage is essentially outside the funnel and is an incubation period where we hope to stay connected with the prospect through social media and target emails with information and updates about our company. The goal is to get these Realtors back to the activation stage.

STAGE	FREE CONTENT/INFORMATION	DESIRED OUTCOME
REACH	Videos, Blog and Social Media Posts	Agent moves to engage stage.
ENGAGE	Free E-Book	Agent moves to activate stage.
ACTIVATE	Mail paper back copy of book and swag.	Agent joins us.
RE-ENGAGE	Targeted emails / updates during incubation period.	Agent joins us.

## Your Brokerage for Life

Just as I want to attract clients to our brand and retain them throughout their lives, I want the same for our agent and broker relationships. A great relationship starts with attracting someone who is personally aligned with our brand values and aspirations. The relationship grows over time as we continuously add value to an agent's business and life.

As the needs of an agent change over the arc of their career, we will adapt, change, and develop whatever new capabilities we need to support them. We will be there from the day they pass their real estate license exam, sell their first house, hire their first assistant, assemble their first team, all the way to the point where they decide to sell their business or just slow down a bit.

Ours is a business relationship, but no matter how much we like to kid ourselves, our business is personal. When we find a good match in an agent, our hearts get thrown in too. There is respect, admiration, and love at the core of what we do. Ours is

## A Real Estate Broker's Guide to Entrepreneurial Success

a relationship where we expect each other to bring the best we have inside us to our profession every day. It is the heart and a mutual commitment to each other's success that sustains our relationships over time.



## Training and Technology

In survey after survey, real estate professionals tell us that what they want most from their broker is training and technology. The surveys do not necessarily specify exactly what kind of training and technology they want, they just want it. If we as broker owners presume to be leaders in our own industry, we need to be very specific how the training and tools we provide our agents are intended to support their businesses. Furthermore, we must be deliberate in the implementation and ongoing support for the training and technology we to provide so that it adds value over time.

There is a tremendous amount of just plain crap in the real estate world disguised as training and technology. Most of the purveyors or real estate coaching and miracle tech tools do nothing to address the actual needs of today's real estate professionals. At best, these distractions interrupt an agent's productivity and at worst leave them in a state of 'analysis-paralysis' where they forget how to interact with the world on a one on one basis. The ultimate goal of these coaches and tech gurus is to produce the next shiny object that captures the attention of just enough licensees to make their charade profitable.

Our approach is different. We will never offer technology for technology's sake. In fact, in our company technology is almost a non-event. It is an invisible presence that makes all we do possible. The successful implementation of our unique methods and processes depend on multiple technologies, but technology itself is not a goal, core value, or company objective in and of itself.

Let's face it, the most important tech we provide as broker owners are working wireless connections, copiers and scanners, and the ability to print from any internet connected device an agent chooses to employ. In many offices a coffee machine is an indispensable piece of tech as well.

We do not attempt to create our own proprietary technology. Everything we use is off the shelf and available to any broker who wants to purchase it. The difference is the tech we purchase and deploy is designed to address a business opportunity or to complete the steps of a specific process. For instance, it makes no sense for us to reinvent the wheel and create our own document management platform. Dotloop already exists, and if deployed correctly and supported internally, provides our agents with capabilities that make them extremely productive.

Training is the second area where we have no desire to reinvent the wheel. There is only one real estate training and development organization dedicated to training agents to work by referral and that is Buffini and Company. Even with all of the money, talent, and resources in the world we would never be able to create the company that Brian Buffini and his team have created. What would be the point?

Referral Maker CRM, Peak Producers training, podcasts, webcasts, advertising content, and personal coaching are all products and services we and our agents purchase from Buffini and Company every year. While these products and services are available to every agent and broker in the world, how we have integrated these products and their underlying philosophies into the fabric of our company is a big part of our 'secret sauce'.

Unlike other brokerages, our training strategy is to give new agents the tools they need to generate an opportunity to write an offer or list a property. We want them to learn the techniques and develop the confidence to become Lead Generation Machines. We are not handing out leads to agents, we are training agents how to create their own leads. To paraphrase the 'if you give a man a fish' proverb, giving an agent a lead may feed him for a week, teaching an agent how to generate his own leads will feed him his entire career.

Many brokerages focus their initial training on the tactical skills of filling out purchase contracts or learning how to use the MLS. These are critical skills to be sure. However, the skills are useless without a reason to use them. Our philosophy is to focus on sales training dedicated to working by referral, and train on using the tools as the agent develops their business. In our offices, the Agent Service Manager (ASM) ensures that our agents have the support they need to make full use of the service and tech tools we provide. I will elaborate on this key staff position later in this section.

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**At ROOST Real Estate Co, we simplify the complexities of renting, buying, and investing in real estate. We are approachable, informative, and generally more relaxed in our approach to collaborating with clients be they Tenants, First Time Buyers, Move-up Buyers, Multiple and Repeat Buyers, or Property Owners who want to ensure that their investments are profitable. We help our clients, team members and Broker /Owner Partners eliminate dangers, capture opportunities, and maximize their strengths.**

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### **Transitioning to a New Culture**

I have agents that have been with me since my RE/MAX days. They have seen me at my best and at my worst. They watched me live and bleed RE/MAX red, white, and blue, and rent hot air balloons for display at local events for almost eight years. They endured the transition back to a local Mom and Pop

operation and stuck with me through the creation of, and the transition to, ROOST Real Estate Co. Not everyone made it however, some were left behind.

Transitioning to a new business model, philosophy and culture can be a traumatic experience. Change is hard and most people avoid it all costs. Even good change is stressful. While it is impossible to make transitioning a real estate business to a new model completely painless, knowing where obstacles are likely to come up can be helpful.

First of all, to some degree, your agents are going to be inconvenienced. Some inconveniences will be minor, like changing out yard signs to reflect the company change. Other annoyances like notifying the local board of realtors, completing new licensing requirements, and updating websites as individual tasks are not that terrible. When experienced in their totality however, they can be overwhelming. Especially when the agent still has their day to day business to run.

Aside from the perceived enormity of the transition, agents may be reluctant to embrace the new direction because they feel they have tried this before. If the last major transformation did not 'take' why should they believe this one will? Expect some folks, agents and staff, to never get completely on board because they just don't believe it will ever work. Some will give it a chance. Some will not.

You as a broker may be interested in making a change because you believe that a new direction and culture will counter low team moral. A new direction may be just what the team needs to get back on a growth track. Be aware however that too much change too quickly, inadequate support, ineffective leadership, or poor communication will derail your hopes for a better life and business.

My advice is to never assume anyone is going to buy-in completely to your vision for the future. Sometimes, the people we



think will be on board are the ones that surprise us and choose to leave. Conversely, I have found that people I expected to be in conflict with, were the most eager for change.

In an extreme situation, a little 'creative destruction' may be just what the doctor ordered. Sometimes we have to leave the past behind, and many of the people in it, to secure a new future. As hard as that may be to accept, life is too short to continue in an unhappy situation. In our broker owner training program, The Self-Managing Brokerage™, we address the transitioning of an existing office to a ROOST Real Estate Co. or Lucky Town Real Estate Co. office in detail.

## THE FOUR FREEDOMS OF A REAL ESTATE PROFESSIONAL

I spend a significant amount of time in *A Real Estate Agent's Guide to the Good Life* painting a picture of what the life of a real estate professional can be like. For many agents, life could and should be better. If real estate does not offer a superior way of making our way in the world, I don't see the point of being in the business at all. There are much easier ways of making a living.

Dan Sullivan founder of the entrepreneurial coaching firm Strategic Coach™ (who I will write more about later in Part #3) says that successful entrepreneurs enjoy four 'freedoms'. The freedom of *time, money, relationship, and purpose*. I have thought a lot over the years about what these four freedoms might look like for real estate professionals. and how we as brokers can help our agents learn to enjoy them.

## **Freedom of Time**

The freedom of time means our agents are in control of their days. Our agents were told that becoming Realtors would allow them to work when and how they wanted to. But at the end of the day, how many agents really have control over their time? Whether because they feel financial pressure to be on duty 24/7, or lack the support to focus solely on their clients and relationships, too often their time is not their own.

## **Freedom of Relationship**

The freedom of relationship means our agents get to choose their clients. The confidence of our agents is often depleted by working with people they flat out do not enjoy working with because they have no other choice. Because most agents do not have the skills to create a steady stream of incoming referrals, they end up trying to please clients and customers that at best do not appreciate their efforts, and at worst are just plain abusive.

## **Freedom of Money**

Not only were our agents promised control of their time, they were told they had unlimited income potential too. Most agents learn very quickly that unless they have the resources, training, and support to claim their share of the billions of dollars of real estate commissions generated annually in the United States alone, real estate pays rather poorly. Freedom of money at our company means that our agents have everything they need to build a business big enough to meet whatever income goals they have.

## **Freedom of Purpose**

Every agent needs a reason or motivation to do their jobs. They need a purpose. That purpose may be unrelated to real estate. Real estate may be a means to achieve a personal goal. For others, the satisfaction that comes with helping people make the big moves in their lives is purpose enough. We all want to be heroes to our clients. As a company, our purpose is to help people live the way they want to live today, and get them where they want to be tomorrow.

# The 4 Freedoms for Real Estate Professionals

Freedom from spending your **time** doing things you are not good at or that do not align with your goals. Freedom to do what you love and what you do best—make real estate dreams come true.

**TIME**

**RELATIONSHIP**

Freedom from taking on any customer with a pulse that happens to call your cell phone. Freedom to work only with clients and customers that respect you and value both you and your time.

Freedom from living closing to closing, and not having the resources needed to create stable income. Freedom to build a business that works for you by creating increasing value, leading to more referrals and increasing levels of income.

**MONEY**

**PURPOSE**

Freedom from continuously finding yourself involved in things you don't find meaningful. Freedom to work in a company with a culture that values your dreams and goals and is committed to seeing you succeed on your terms.

## THE RHYTHM OF OUR BUSINESS

Another key difference in the culture of our company versus other real estate firms is how we embrace the annual rhythm, or flow of our business. While working by referral makes for far more consistent income throughout the year, there is still a seasonality to the business. Our agents need to be aware of it, they need to be comfortable in it, and we need to model the way.

Having tracked my personal productivity, and the productivity of my agents, for several years now, I know exactly when we need to be 'in' the business, when we need to be working 'on' the business, and when we need to be focused on recovery and rejuvenation - so we can go out and do it all over again. Working against the natural economic tide leads to decreased productivity, stress, mistakes, and eventually burnout.

### **Holidays and Long Weekends**

Free time, time off, a holiday, or a vacation should not be something we must earn and then reward ourselves with at some point in the future. For a real estate professional, and any other professional for that matter, time off for rest, relaxation, and rejuvenation is essential to being able to operate in a peak state. Time off and rest must be a top priority to make long term success possible. People who never take time off quite simply cannot last in this business.

We all know agents that like to be on call over holiday weekends because they think they are going to get a step ahead of the slacker agents enjoying some much-needed time off with their families. I used to be the same way until I realized the random showings and appointments I took rarely resulted in a closing, much less a referral relationship of any kind.

I counsel my agents to mark off every national holiday on their calendar as a free day for the rest of their lives. I tell them not to just mark off the holidays, mark off the weekend that sur-

rounds it. I want them to start with the big six national holidays, Christmas Day, New Year's Day, Memorial Day, 4th of July, Labor Day, and Thanksgiving. Once they master these few days, they will be more comfortable taking additional time off in the months and years ahead.

Our clients are taking this time off, and even if they are not, they are going to understand and support our agents taking time off. Clients and customers who don't understand need to be released back to the market. They can go find another agent to torture. Our agents deserve better. We need to encourage our agents to set boundaries and respect and protect them. I know of no other professional fields where the practitioners are at the mercy of the public 24/7. Real estate agents should not be either.

### **The 'All-In' Season**

Spring and summer without a doubt is the prime season for real estate. A referral based business will produce steady income throughout the year, but spring and summer is when our agents can take their businesses to another level, and harvest additional financial rewards. This is time to go to work!

Here in Ohio, we tell our sellers that they want to get their house on the market right around Valentine's Day. That way, when the very first new buyers of the year start to dust off their Realtor.com apps, their properties are ready and waiting. If the winter has been particularly harsh, that first glimpse of warmer weather leads to a dramatic increase in activity in March.

Spring and summer is when we have to be in our business and 100% committed. Spring and summer is when our agents will be working late at least a couple of nights a week and probably at least one day each weekend. The business is there. Their clients need their help and this is what they signed up for. They need to be 'all-in'.

The latter half of February, March and April are prime time but there are breaks in the business where things naturally slow down a bit. There is a pause for instance during Easter and spring break season. May, June and July are generally the busiest months of the year but Memorial Day weekend offers a break at a crucial time. June tends to slow down every year for a few days around graduation party season and Father's Day.

A strong July is critical to a strong year but I still want to see agents take the 4th of July and the nearest weekend off. Independence Day week is one of the most popular summer vacation weeks for our clients, so it is a natural time for our agents to take a break too. July is also a transitional month. A lot of business will occur in a short time but by the end, things start to slow down as people squeeze in their last bit of vacation time before school starts again. Which brings us to August.

## **The Mid-Year Recovery**

There is still business to be had in August, but in reality, it is one of the slowest months of the year for placing houses under contract and securing new business. It is however, one of the biggest months for closings and our agents' customer service and contract management skills are on full display. August marks the end of the All-In peak period and our agents need to take a break and celebrate another successful season.

## **The 'On the Business' Season**

As we move into the last third of the year, the peak season is behind us. While there will still be a steady stream of referrals flowing our way, it's time to look back at spring and summer with a critical eye and look for lessons learned that will make next year even better. During the fall, I like to encourage my agents to focus on developing new capabilities, completing continuing education requirements, and attending the State and maybe the

National Association of Realtors conventions. I also want them to start developing next year's business plan. I want to encourage them to create space to reflect and make plans to improve.

### **The Holidays**

The holiday season in the USA starts with Halloween and spills like a hangover into the first week of January. It happens this way every year. From a working by referral perspective the holidays are the most important time of the year. This is the time when our agents should be making calls, writing notes and cards, giving gifts, going to parties, and visiting with their clients.

I want our agents to approach the holiday season with a plan and sense of purpose. Their goal should be to contact everyone in their database at least once – and sometimes more than once. During November and December, the seeds that are planted, and the referrals earned, create closings in January and February that other real estate companies can only dream about. This is the 'All-In' season for gratitude and celebration.

### **The Year-End Recovery**

Our agents have done great work this year and it is time to take a break, to recharge, and get some much-needed rest and relaxation with family and friends. Christmas through New Year's should be a guilt-free opportunity for our agents to enjoy themselves and their accomplishments. A new year is about to begin, and spring and summer are right around the corner.

## THE AGENT SERVICE MANAGER

A primary tenant of our company culture and staffing strategy is to create an environment where everyone is free to do what they do best. Every team member in our offices has a defined role on their team and are given the tools and the latitude to do their jobs. We have a number of hiring tools to assist us in identifying 'right-fit' team members. One way to ensure that our agents are free to do what they do best, is to support them with a staff person we call the Agent Service Manager (ASM).

The Agent Service Manager's sole responsibility is to support the daily business activities of the agents assigned to him or her. The ASM is often the primary point of contact between the agent and the brokerage. Consequently this key team member must embody the best of what ROOST Real Estate Co. and Lucky Town Real Estate Co. aspire to be.

The ASM manages all of the agent services the brokerage provides and provides ongoing technical and training support as needed. The ASM may be licensed or unlicensed but we feel an unlicensed person is best so that it is clear that he or she is in a supporting role and not in competition with the agents. The ASM plays a critical role in the successful day to day functioning of the brokerage.

The ASM in many respects functions as a personal business assistant to the agents assigned to them. This means, within reason of course, the ASM is expected to do whatever it takes to assist the agent in facilitating the completion of a transaction and getting paid. This may mean scanning and emailing documents, getting signatures, pulling files, making copies, scheduling a random appointment, or in many cases just being there to listen when the agents are 'in the weeds'.



## **Job Description / Agent Service Manager (ASM)**

- Ensure that our agents are getting the greatest benefit from the tools we provide.
- Onboarding new agents and implementing The Quick Start Game Plan™.
- Assist with client appreciation parties, agent training sessions, meetings, and any other brokerage associated events.
- Coordinate monthly Item of Value mailings each month.
- Coordinate special projects such as screening new vendors, and managing new equipment and software installs.
- Process files, make bank deposits, and write commission checks to agents.
- Manage the brokerage trust account to state standards.
- Invoice agents monthly for errors and omissions insurance, MLS, board fees, and miscellaneous expenses.
- Maintain Dotloop and paper-copy listing files to Division of Real Estate standards.
- Maintain personnel files and records for agents, brokers and branch offices.
- Maintain brand standards by encouraging each agent to complete Listing and / or Buyer checklists for each file.
- Schedule showings, duplicate listings in secondary MLS systems if applicable, and complete random tasks as requested.

It is important to highlight what we do not want to task the ASM with. The ASM is not the company bookkeeper or the office receptionist. They are not a sales person but they may interact with customers and clients during the performance of their duties. Overall office sales volume and agent count will determine the ultimate task list for any staff member, but as a rule, if the task does not directly benefit at least one agent, the task should be performed by someone else.

The ASM needs to be proficient with Microsoft Office, be able to navigate the web, maintain electronic files, use all of the tools we provide our agents, and become familiar with the deposit and check writing functions of QuickBooks Online. We recommend the ASM candidate take a Kolbe A ([www.Kolbe.com](http://www.Kolbe.com)) assessment and complete an office task 'test' prior to extending an offer. He or she must be available in the office during normal business hours.

## **How We Support Working by Referral**

We offer Referral Maker CRM (Client Relationship Manager) to our agents. This desktop and mobile platform is offered by Buffini and Company our training and coaching partners. Referral Maker allows agents to track their referral creating activities, relationships, and transactions. Referral Maker for Teams allows the broker or sales manager to manage leads, and reward referral producing activities for all agents in the office.

The ASM assists new agents with importing their database of relationships to their Referral Maker account, directing agents to experts at Buffini and Company when questions arise, and accessing each agent's database each month in order to create the monthly Item of Value (IOA) mailings.

A key tenant of 'working by referral' are the personalized Buffini and Company designed monthly Item of Value mailings. We mail up to 100 Items of Value each month to our agents' very best clients - at no cost to the agent. This jump start to the Working by Referral business model is one of the most valuable services we provide. The ASM must insure this monthly task is executed without fail.

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**We are not handing out leads to agents, we are training agents how to create their own leads. To paraphrase the 'if you give a man a fish' proverb, giving an agent a lead may feed him for a week, teaching an agent how to generate his own leads will feed him his entire career.**

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## **Backstage Support**

A real estate professional focused on building relationships, generating leads, and closing transactions doesn't always have time for all of the 'backstage' activities that make the 'on stage' work possible. That is why we offer each agent a complete productivity package designed to allow our agents more time with their clients and customers.

Each agent is set up with an account at Centralized Showing Services or Showingtime Showing Service to eliminate the need to personally set up showings on their listings. Each of these services provide a mobile app allowing each agent to quickly and easily tailor the service to the needs of each seller. These services and others like them, automatically ask the showing agents for feedback and that feedback can be shared directly with the seller in real time.

Each agent is set up with a Dotloop account. Dotloop allows agents to create contracts and listing packages electronically on their desktop computers or mobile devices. It provides a secure platform for obtaining signatures electronically and ensuring that contract packages are complete for compliance purposes.

Each agent is set up with a personal 8X8 Phone Number. Our offices are equipped with an 8X8 state-of-the-art cloud based auto attendant and voicemail system. The 8X8 system allows each office to tailor their answering and communication services to the needs of their specific clients and market. Through either a desktop computer or mobile app, agents direct their incoming calls to ring through to their desk, home office, cell phone, a fellow team member, or to voicemail, at select times of the day. Agents can be notified about voicemail messages via email as well.

Each of the above services require periodic upgrading and additional training from time to time. The Agent Service Manager is responsible for implementing not only upgrades to existing

services as needed, but also bringing new agent services online as opportunities arise. The ASM is ultimately responsible for making sure the office 'works' – meaning the office has dependable wireless internet access, fully functioning office machines and backup plans, and that the overall office is clean and maintained.

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### Your Pay Your Way

Whether you are new to the business, an experienced professional, or a team leader looking for the best possible brokerage to build your business with, ROOST Real Estate Co. has a compensation plan and fee structure that grows with you as your business grows. Your Pay Your Way™ is designed to be transparent, easy to understand, and most of all flexible. It is designed to support the goals of the agent, the brokerage, and the ROOST Real Estate Co. mission and brand values

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### YOUR PAY YOUR WAY™

A ROOST Real Estate Co. broker owner has five financial commitments. The first commitment is the *Monthly Franchise and Marketing Fee* payable to Real Estate Brands Ltd. This money is used by Real Estate Brands Ltd to continue to expand the brand through social and other electronic media, upgrade our print materials, and to keep the brand fresh and forward thinking.

This fee is equal to 5% of sales and is payable monthly by the broker owner. This fee is capped through year 2020 at 5% of gross agent sales or a maximum of \$5,000 per agent per year. And, unlike other national franchises, Real Estate Brands Ltd does not collect fees on individual transactions.

The second commitment the broker has, is the *Shared Office Expense*. This fee is collected to cover the overhead of the phys-

ical office space including, rent or mortgage payments, office equipment, utilities, and all the rest of the things required to maintain a business. This fee is equal to 5% of sales and is retained by the broker. This fee is also capped through 2020 at 5% of sales per agent per year to a maximum of \$5000.

The third commitment the broker has, is to the *Administrative Staff* including the Agent Service Manager(s) or ASM's. Whether an office has 50 agents or 5 agents, administrative functions have to be completed by someone, and even if this is done in the early days by the broker herself, there is a cost involved. This fee is equal to 5% of sales and is retained by the broker. This fee is also capped through 2020 at 5% of sales per agent per year to a maximum of \$5,000.

The fourth commitment the broker has, is to the *Basic Agent Service* and *Technology Package*. We want our agents focused on working with buyers and sellers. We do not want our agents doing basic marketing and promotion, setting up showings, or filling out contracts with pen and paper. This fee is also capped at \$5,000 a year or 5% of sales through 2020.

The Fifth Commitment is to the broker owner herself and is called the *Broker Service Fee*. Every fee we have defined so far exists to cover the cost of owning and operating a brokerage. Every entrepreneur expects a return on their investment of time and capital. Our franchises are no different. This is where the Broker Service Fee comes in.

As you will note above, the monthly Franchise and Marketing Fee, Shared Office expense, Administrative Staff fee, and Basic Agent Services and Technology Package add up to 20% of every commission dollar earned by an agent. *However, the most an agent will ever pay in any calendar year for these fees is \$20,000 regardless of how much they earn.* These fees are capped to cover actual costs and no more.

The Broker Service fee is equal to 10% of every commission dollar earned by every agent. There is no cap on this fee.

Whether an agent earns \$100,000 or \$1,000,000 over the course of the year, the brokerage will retain 10%. We structure our fees this way to ensure the broker owners are rewarded and motivated to support all producers, regardless of their volume.

Agent teams are a strong trend right now and I believe will continue to be popular well into the future. All 'team' sales whether credited to a team member or the team leader are subject to the first four broker commitments up to a maximum of \$5,000.00 each or a total of \$20,000.00 per year. All team members are subject to The Franchise and Marketing Fee up to an annual maximum of \$5,000.00 per year. The Broker Service Fee is equal to 10% of all gross commissions earned by the team and has no annual cap.

### **Our Financial Goals for Our Agents**

I would love to see every one of our agents earn at least \$100,000 in gross commissions each year. If that agent is paid on a 70/30 split, they are paid \$70,000 and the brokerage retains \$30,000. All agents are responsible for their annual board dues and licensing fees, MLS fees, and a monthly errors and omissions insurance fee determined by the broker.

What if this agent has a great year and hits their \$100,000 sales goal at the end of September and still has several closings in the last quarter of the year? Once the brokerage is paid \$30,000 the agent keeps 90% of every dollar they earn for the rest of the calendar year. This compensates the agent at, or above, the industry average and allows the brokerage to continue to grow, upgrade, and offer new services over time.

For a new agent just starting out, we offer full service and support with a 60/40 split. Sixty percent of every dollar the agent earns is paid to the agent, and 40% is retained by the brokerage. The agent is responsible for their monthly MLS(s) fees and a monthly Errors and Omissions Insurance fee. Once the agent earns gross commissions of at least \$60,000 during

a twelve-month period, or at the discretion of the broker owner, they move to the standard 70/30 split.

Agents with a proven track record earning in excess of \$150,000 per year, may negotiate up to a 90/10 split with the monthly Franchise and Marketing Fee, Shared Office expense, Administrative Staff fee, and Basic Agent and Technology Services Package covered with an additional monthly payment. This gives the broker the flexibility to create a package for a top producing agent or team while remaining true to the tenants of Your Pay Your Way™.

I am going to talk about property management as it relates to broker profitability in the next section of this book. I recommend that when a broker owner establishes a property management department that they staff it with w2 employees, including the licensed members of the team. However, there are situations where a licensed property manager with an established book of business may want to join one of our offices. If that is the case, they should be treated exactly like any other licensed agent according to Your Pay Your Way™.



# THE BROKER OWNER EXPERIENCE

## PART 3: THE BROKER OWNER EXPERIENCE

**In this section I want to give the reader a sense of what sets our broker owner relationships apart from the industry norms.**

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I want to try and share the essence and spirit of our brand, and how that hopefully will come through in the marketing and advertising materials we have in development. So, to begin, I have included some of the content from our Partner with Real Estate Brands Ltd. Brochure.

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# PARTNER WITH REAL ESTATE BRANDS LTD®

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## Mission

We at Real Estate Brands want to be heroes to real estate brokers everywhere who work hard every day for their agents and clients.

## FOR THE WAY YOU WANT TO LIVE TODAY™

## Vision



Our goal is to redefine the real estate brokerage business model by ensuring superior support and services for our clients whether they are renting their first apartment, buying their first home, their second home, investment property, or an empty-nest condominium. We want to be our clients' real estate brokerage for life.

We provide our Broker Owner Partners with the tools and marketing muscle to create new streams of income from all facets of the real estate industry. These streams of income include listing and selling residential property, selling, leasing, and managing commercial property, and working closely with the owners of investment property to ensure their properties are working for them and not the other way around.

Broker profitability and positive cash flow is job number one.

As we continuously expand our client base, whether they be renting or buying, we expand the opportunities for our licensed real estate professionals to grow their businesses in a thoughtful and intentional manner. At ROOST Real Estate Co. our licensed professionals are the best in the business and are all dedicated to continuously adding value, expanding their capabilities, and deepening long term relationships with their clients.

**Real Estate Brands Ltd.** *is about the way our clients live today and the way they want to live tomorrow.*

## THE SELF-MANAGING BROKERAGE™

**1. We Work by Referral** – We are in the relationship business, not the transaction business. Our approach to the business is built on earning referrals from our very best clients. Working by referral is built into our DNA and is essential to who we are as a company. We not only teach our licensed professionals how to create referral based businesses, we support them daily through our operations, marketing, and technical investments.

**2. The Client Obsession** – We are committed to maximizing every opportunity we can to form a personal and lasting connection with our clients. Every client touch point from the moment a potential client contemplates a purchase or sale, until well after a transaction is closed, is an opportunity to advance our brand and reputation.

**3. Innovation Through Process** – We understand the freedom, innovation, and superior service is achieved by documenting and sharing everything we know about operating a profitable brokerage with our partners. A profitable franchise relationship is not just about a logo and marketing slogan, it is about the proven processes and operational procedures that form the basis for a consistent and satisfying client experience.

**4. Agents for Life** – It goes without saying that our licensed professionals are the front line of our organization. Our agent attraction strategy and selection process is designed to screen in professionals that are personally aligned with our brand values. We expect to be the brokerage of choice for every agent we serve, at every stage of their career. We pledge to work with our broker owner partners to provide the leadership necessary to ensure our agents reach their personal goals and potential.

**5. Tools and Tech** – From the mundane of a reliable wireless connection and working printers and scanners, to the sophisticated technology of an online customer relationship manager, the tools we provide our agents must work as promised day in and day out. Every tool and technology

we offer our agents is designed to facilitate working by referral, or to increase productivity. Tech that does not support at least one of these mandates is a distraction to be avoided.

**6. Broker Profitability is Job #1** – Our mission is to support the entrepreneurs that have chosen to make their mark on the world through real estate. Broker owners have been hit from all sides for years now. We believe that broker owners deserve to be recognized, and appropriately compensated, for the critical role they play in our industry. Our clients will only be served if our brokerages and broker owners are financially strong.

**7. The 25% Solution** – There is significant opportunity in this business for broker owners who wish to serve 100% of the people who need a home, not just the people who want to own their home. Adding property management services sets up an additional stream of income that can make the difference between merely existing as an independently owned brokerage, and thriving. While it may be appropriate for some offices to emphasis property management over sales, for most, property management income that is no more than 25% of total revenue is enough create significantly increased cash flow..

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**The Self-Managing Brokerage™** is our training program for our broker owner partners and franchisees. It is a self-contained business plan designed launch a new brokerage, or to transition an existing brokerage to the Real Estate Brands Ltd model. Creating a Self-Managing Brokerage is not a one-time training event, it is the foundation of our value-added relationship with our partners and franchisees.

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## **A Word about Chris McAllister**

Chris has been a Realtor® since 2001 and a broker since 2003. Chris has owned franchises and helped manage a locally owned firm. He has lived the best and worst of both worlds and believes that a real estate firm has to be about the profession and the client to be successful. It cannot be simply about the agent or simply about the owner.

Most large real estate firms are in the business of recruiting agents and selling franchises. These are important goals at ROOST as well but

new partners, recruits, and offices are a natural result of the growth of the brand and our message and mission of being Smart, Passionate, Supportive and Approachable.

ROOST Real Estate Co. is designed to serve the needs and goals of all of their stakeholders. To do that however, the Broker owner Entrepreneurs have to make an appropriate return on their time, talent, and financial investments. The Self-Managing Brokerage™ is the training, branding, and operational guide to leading a successful and profitable ROOST Real Estate Co. or Lucky Town Real Estate Co. brokerage

Chris's unique ability is creating business opportunities and strategies designed to support and add value to the lives of real estate professionals and their clients. ROOST Real Estate Co. is not only the company Chris has always wanted to work for, he considers ROOST Real Estate Co. to be his life's work.

## **Real Estate Brands Ltd Owners and Partners**

Real Estate Brands Ltd plans to expand by partnering with entrepreneurs interested in acquiring a franchise and franchise rights to specific geographic areas. We also expect to expand by opening additional company owned offices. RELB is also interested in establishing financial partnerships with entrepreneurs in new markets where RELB would share both the risks and rewards of a new venture.

For more information please contact Chris McAllister at 844-806-6577 or [Chris@RealEstateBrands.com](mailto:Chris@RealEstateBrands.com).

## **Our Five Aspirations**

I have five 'Core Aspirations' for our company.

- 1. Be the Most Referred Real Estate Brand in the Land**
- 2. Keep Clients for Life**
- 3. Be the Only Partner our Realtors Will Ever Need**
- 4. Lead in Average Agent Productivity**
- 5. Support the Most Profitable Broker owners in the Industry**

Continuous improvement towards achieving aspirations 1 and 2 are pre-requisites for achieving numbers 3, 4, and 5. But the reality is all five aspirations support and enhance the whole. Improvement in one aspiration supports improvement in all of the others. It all sounds a little out there I know but bear with me.

We are playing a different game than our commoditized competition. We are making our own rules and establishing our own unique criteria for success. These are the outcomes that matter to us. We will measure our improvement in each aspiration over time. Our competitors will eventually have to grade themselves against the standards we set.

The value of a ROOST Real Estate Co. or Lucky Town Real Estate Co. franchise is in the processes we have created, documented, and made available to our broker owner partners. Process is the not so sexy twin of what most people perceive as a brand. The real value of a McDonald's franchise is in the systems, methods, and processes designed to ensure the profitability of the business.

Let's face it, anyone can make a hamburger, but very few people can make billions of hamburgers at scale, and at a profit. Not to put too fine a point on it, just about anyone can get a

real estate license and sell a house or two too. Creating a scalable and sustainable business selling houses is not so easy.

An individual involved in selling a product or service is involved in a transaction. An individual or company involved in selling a process, is involved in transformation. We aspire to be in the transformation business. It is counterintuitive to many, but the security of working within a proven process leads to greater creativity, connections and transformation. A unique process will give you the tools you need to lead your team, your market, and our industry.

The majority of our unique methods and processes are centered on marketing and advertising. I believe that to be a successful entrepreneur in any industry, one has to be a successful marketer. Marketing drives the business and consistent execution drives results. I look at Real Estate Brands Ltd. as a marketing company that just happens to work in the real estate industry.

Dan Sullivan, founder of the Strategic Coach™, has distilled the duties of an entrepreneur to their very essence. Sullivan defines marketing as the systematic planning, implementing, and control of business activity to bring together buyers and sellers. He defines sales as a transaction between two parties where the buyer received goods, services, or assets in exchange for money. Finally, he defines an entrepreneur as a person whose primary duties are the identification of the goods and services desired by a set of consumers, as well as the marketing of those goods and services on behalf of a company.

## **My Take on the State of Our Industry**

The real estate brokerage industry thrived during the early 2000's until the slowdown and eventual crash in 2007 and 2008. Almost every model from the large international franchises, to the regional players, to the Mom and Pop shops across the country made money during the early 2000's. As



we know, access to easy financing drove the frenzy and the resulting financial crisis.

Technology, the internet and the microchip have had a profound effect on the real estate industry during the last ten to fifteen years. The effect of rapidly changing technology on the real estate industry is not unlike the effect technology had on the travel industry. Real estate agents have not gone the way of the travel agent of course, but our industry has become a revolving door for new licensees who cannot gain traction quickly. Successful agents have learned to both work with, and to leverage technology, so that it works for them.

Big players will always be with us, however, small players and niche players are learning to use technology to compete increasingly well with the giants. When looking at the industry in terms of productivity per agent one will find high volume agents at both the big companies, but increasingly in small niche or boutique firms.

Advertising dollars in the real estate industry are traditionally spent in two areas, personal or institutional marketing, and advertising listings for sale. Technology and the new virtual real estate brands are quickly leveling the playing field when it comes to exposure of real estate listings. Consumers do not go to an individual agent website – or even a company site anymore – to look for a home. They go to Zillow, Trulia and Realtor.com for information and to see listings.

In terms of building a following, social media, YouTube, and Google are quickly changing what works in terms of building brand awareness. From the beginning we hired professional social media experts to create and manage our presence on Facebook and Twitter. We are expanding our strategy to include Instagram to target first time buyers and LinkedIn for recruiting purposes. While our internet marketing investments are substantial, they are a fraction of what they would have been had we launched 20 years ago.

Real estate agents no longer have the luxury of building a sustainable business thanks to simply being licensed by the state, cornering the market on listings, and doing whatever is possible to control access to information about those listings. All of the information on the local multiple listing services is available everywhere on the internet. This traditional advantage no longer exists.

Real estate brokerage has always been an 80/20 business. This means that just 20% of the licensed agent population conducts 80% of the business. The full time professional who has built and nurtured a proprietary book of business and knows his or her local market values is generally doing well right now. The full time professional with an established book of business who has embraced the new technological reality has an opportunity to do incredibly well right now.

The great recession has also changed what people think of as the American Dream. The last few years have been a nightmare for many home owners. The loss of equity, being upside down on the mortgage, and the need for mobility – i.e. being able to go where the work is – has for many people stricken homeownership from their list of lifetime goals.

According to the U.S. Census Bureau, the seasonally adjusted national homeownership rate stood at 65.3 percent in the fourth quarter of 2012. That was a big dip compared with the peak of 69.4 percent in 2004 but comparable to the 65.4 percent rate at the beginning of 1996. (<http://www.bankrate.com/finance/real-estate/nation-of-renters.aspx>)

Obviously, more and more people are choosing to rent their homes than buy. 34.6% of the population require a home to rent. Many of these people will not rent their entire lives. Many will eventually buy – and some of these will sell and rent again. Attitudes toward renting vs. home ownership have, and are changing rapidly for more than a third of population either by choice or necessity.

This market begs to be served. The opportunity for professionalizing the property management business has presented itself. This requires improving the service level as the intermediary – the licensed real estate broker – between the tenant client and the investor client. The income stream from property management done well can be a significant source of income for real estate brokers.

Property management has never been easy, never been especially lucrative, and for the most part a niche business for a handful of small real estate firms. However, demand for this service is rising. The challenge is serving the needs of the tenant client while ensuring that the owner client is making the required return on his or her investment. Prudent application of technology and the realization that many tenant clients will become buyers, and if not buyers then potentially tenants for life, means that either way, incorporating property management into the traditional brokerage model is an opportunity whose time has come.

When one considers the demographic tsunami of the echo boomers / millennials moving into the housing market as both tenants and first time home buyers, the opportunity to broker all of the housing needs of this cohort is immense. The coincidental opportunity to serve the needs of landlord owners as capital floods the housing market less than a decade after the crash is equally immense.

An article in the October 2013 issue of The Atlantic titled “Why Wall Street Loves Houses Again” sums up the opportunity when discussing the Blackstone Group’s massive investment in single family housing:

*“...the firm sees a new, untapped market that it believes can serve a growing group of renters who, thanks to tightening credit standards, can no longer afford the down payment to buy a home, or have been unable to convince a bank to give them a mortgage, or have simply soured on the idea of homeownership. Since the crises, Gray says the number of single-family homes*

*being rented has increased from 11 million to 14 million. ...the downturn created an opportunity to create a business ... and in doing so we could do something for tenants that never existed before... Wouldn't somebody pay for that experience?"*

Not only will tenants pay for this experience but real estate investors require this level of service in what will be an increasingly competitive marketplace.

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**No national or regional franchises that we are aware of are actively serving the needs of 100% of the people who require a place to live. The 65% that are and wish to remain homeowners is their primary focus. We believe serving the housing needs of all customers be they tenants, buyers, or investors creates a synergy that will transform the real estate brokerage model and create new and fresh opportunities for real estate broker owners throughout the United States.**

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## **Broker Profitability Matters**

I believe that where our passion for our business intersects with our desire to be heroes to our clients lies our opportunity as entrepreneurs to be rewarded handsomely for our efforts. This is not a magic formula however. If it were, many of us would be very well off indeed. Profitability requires focus, structure, a set of proven processes, and intentional execution.

Our business plan is deceptively simple. It is designed to offer our agents and clients superior experiences not regularly obtainable in the market, at a competitive if not premium price. In short, we offer superior value. My goal is to offer our broker owner partners and franchisees superior value as well.

A ROOST Real Estate Co. or Lucky Town Real Estate Co. franchise is not the least expensive in the market nor the most

expensive. Our fees are however transparent and straight forward. There are no surprises and no hidden charges. We work with our partners the same way we want you to work with your agents and clients. If you know what to expect, you can plan and budget for it.

Profitability is influenced by both revenue and expenses. Profitability is also influenced by how we manage our income and expenses. The difference any given month between our revenue earned and expenses paid is cash flow. Managing cashflow is critical to the success of a real estate brokerage and its ultimate profitability. Make no mistake, the cliché is true, cashflow is king.

I am passionate about teaching our broker owners to manage their cashflow. Some of us are very good at this skill and need no assistance. For most of us however, at least in my experience, budgeting, forecasting, and managing cashflow are not core competencies. A significant portion of our broker owner training program, called The Self-Managing Brokerage, is devoted to just this topic. We also provide ongoing support and access to additional resources as needed.

We suggest that our partners utilize QuickBooks online to manage their accounting. Using the online version allows the owner, Agent Service Manager, an accountant or bookkeeper, and any other team member to have access to the system tailored to their role in the company. We provide our franchisees with a chart of accounts specific to running a ROOST or Lucky Town brokerage. We also offer The Cash Flow Forecaster™, built on an excel spreadsheet, to help project and manage expected income and expenses into the future.

We help build revenue with internet marketing strategies designed to grow our three main lines of business. We have The Agent Attraction Strategy discussed previously in Part 2, as well as dedicated programs for attracting property management clients, and of course buyers and sellers. We utilize search engine marketing, blogs, our continuously evolving websites, and various social media platforms to reach our target audiences. It

is possible that these techniques were responsible for introducing us to you, a potential future partner.

## **Managing Revenue and Expenses**

Your Pay Your Way™ is designed to attract agents who want to build a scalable and sustainable business in a way that rewards the broker owner for their efforts. It directly and indirectly sets standards of service and production for our agents. It names a target and sets the bar high enough to be a challenge. It is a universal program with no room for special deals. It is flexible enough to accommodate high producers without compromising the integrity of the strategy. It is the primary income stream for most franchisees.

An additional revenue stream to the brokerage may include the broker owner's own production. While it is never a good idea for the broker to be in competition with his or her agents, there is nothing wrong with a broker cultivating their own book of business. The broker owner who walks the walk when it comes to working by referral and making full use of the tools we provide, is a powerful motivating force for the agents in the office.

Another revenue stream that few brokers take advantage of is property management. Property management as a stand-alone department is not necessarily a great profit generator in and of itself. However, revenue from this service covers a significant amount of general office overhead throughout the year, making ongoing marketing and agent support investments sustainable. And, as I discussed earlier, the relationships we have with our owner clients are some of our best as many continue to buy more properties which generates additional commission income to the brokerage.

In my office in Springfield, our average rent per unit is right around \$550 per month. Our average sale hovers between \$100,000 and \$120,000. We are not a high-end market. The

revenue we generate managing a little over 700 units for 150 or so owners comes to about 25% of our total revenue. That means 75% of our revenue comes from sales. Other offices may do more and others less. For the Springfield office, it is the perfect mix. That is why I refer to adding property management to a brokerage's service offerings as the 25% Solution.

The Self-Managing Brokerage broker training program has a complete section devoted to starting and building a property management department. We have almost 15 years of experience in this area and have developed methods and processes that make the business manageable. We currently look after 1200+ units amongst all our offices and we do it with an internet based system called AppFolio. [www.AppFolio.com](http://www.AppFolio.com) We also employ a dedicated accounting firm specializing in property management and the AppFolio platform to handle our accounts payable and monthly reconciliations.

Expense management is built into our model for operating a profitable brokerage. Just as revenue is tied directly to productivity, so is expense management. One of the biggest expenses for any brokerage, especially one running a stand-alone property management division, is payroll.

We address the payroll / productivity issue by first creating detailed job descriptions for every team member on each team. (An example job description for the Agent Service Manager is included in Part #2 of this book.) From there we document the behaviors of previously successful team members, and hire accordingly. There are a few more steps to the process that we teach in The Self-Managing Real Estate Brokerage™ training program, but that is the gist of our method.

We also influence expenses by building partnerships with vendors that know us and understand our business. For instance, our printing partners have built a website for us designed to facilitate personalizing and ordering printed material such as business cards and brochures. Our sign company does the same. Our website and internet partners are set up to expand

with us and our broker owner partners well into the future at costs we can plan for and count on. We only work with vendors that offer us the greatest value for our money.

## **Marketing with Mindset Scorecards**

As I mentioned earlier in Part #2, we are working on several marketing projects using what we call mindset scorecards. We are currently beta-testing the *Good Life* for Realtors scorecard, the *Make Your Real Estate Work* scorecard for prospective property management clients, the *Happy Home Buyer* and *Successful Home Seller* scorecards, the *What Success Looks Like* score card for staff members, and the *Take a Look at Your Future* scorecard for prospective broker partners and franchisees.

A mindset scorecard is designed to do several things. First, it is an instrument that clearly defines our goals and aspirations as a company. Second, it helps prospective clients self-identify with our way of doing business and motivating them to learn more about what we offer. Third, depending on how a prospective client, team member, realtor, or broker owner scores themselves, gives us a pretty good idea if they are a good fit for our company.



# A Real Estate Broker's Guide to Entrepreneurial Success

## Take A Look At Your Future

Mindsets	1	2	3	4	5	6	7	8	9	10	11	12
<b>1 Brand Alignment</b>	You want a franchise relationship that requires little commitment and offers the lowest cost possible.			Recruiting to quota is the mantra of your brand. You are tired of going it alone and could use some support.			You are finally making some money and see little reason to rock the boat. All franchises are pretty much the same anyway.			Your brand is a means of building an asset for the future. A brand aligned with your personal values makes you a force to be reckoned with.		
<b>2 Works By Referral</b>	You feel that working by referral takes too long to generate sales. If a buyer or seller is not ready to play right now you move on.			You don't have time or the cash flow to pick and choose who you are going to work with. Your agents work from closing to closing.			Your personal book of business is what pays your bills. You look forward to retiring one day and leaving it all behind.			You aspire to be the most referred real estate firm in your market. Working by referral defeats the commoditization trap.		
<b>3 Strength in Profitability</b>	You don't really like the business of running your own business. You are focused on staying afloat and covering your monthly obligations.			You have no idea any given day if you are profitable or how much cash you have on hand to run your office with.			You have a business budget and a personal budget. Some months are a struggle but your bills are paid and you are making it work.			The real estate market is larger than the 65% of people who own. Finding profitable ways to serve the other 35% is the key to new growth.		
<b>4 Continuously Adds Value</b>	Investing in agents is a fool's game because they will leave you in a minute for a better opportunity.			Your cash flow is dependent on the production of agents you wish worked somewhere else.			Your reputation and market share is solid. Your agents seem satisfied with the value you provide them and their businesses.			You continuously provide your agents with more value than they pay you for. Your agents are always referring new agents to you.		
<b>5 Process Matters</b>	You have no formal processes in place for your sales people to follow. You feel intimidated and left behind by new technology.			Every day is different and you are unable to build upon past successes. You are tired of always reinventing the wheel.			You take the best ideas from continuing education classes and seminars and integrate them in your business.			You and your agents find innovation in the consistency of your unique processes and business methods.		
<b>6 Leveraging Advantages</b>	The only way to succeed is to out-work and out-hustle the other brokers in town. The only way to stand out is to stay busy.			You struggle to define your advantages. You do know that you are tired of the status quo and how cutthroat the business has become.			You enjoy significant advantages in your market based on your past successes in the industry.			You are transforming your market one client at a time. You are playing a new game with advantages others can only dream of.		
<b>7 Committed to Growth</b>	You are envious of other people's progress, success, and advantages. Owning a real estate brokerage was supposed to be much easier.			You are so overworked and pressured by deadlines and cashflow demands that you don't have time for yourself.			You regularly attend Realtor conventions and take classes at your local board to sharpen your sales, leadership, and business skills.			You are the single greatest asset your company has. You are continuously focused on building your skills and personal capabilities.		
<b>8 Leads By Example</b>	You feel increasingly angry and resentful that the real estate business is rigged to undermine and defeat you.			You strive to model the way for your agents but you are often too wrapped in the day to day to make the impact you want to.			Presenting a successful image to the world is the most important thing in your life. Your status must be retained at all costs.			Who you are and how you work is one and the same. This is the basis of your integrity and why you are a respected leader in your field.		

## Make Real Estate Work

Mindsets	1	2	3	4	5	6	7	8	9	10	11	12
<b>1 Focus On What You Do Best</b>	Property management is simply overwhelming and buying investment property was a big mistake.			You feel you are treading water but believe there has to be a better way. Your real estate is taking time away from what you do best.			You carve out enough time to take care of your properties. You may not be as profitable as you could be but your expenses are under.			You are open to the advice of professionals and understand that each of us is best served if we are free to do what we do best.		
<b>2 Profitability Is Job #1</b>	Making your mortgage payments is an accomplishment. Staying out of foreclosure and avoiding bankruptcy are your big wins.			You have no idea if you are profitable or not. You have yet to glimpse the financial stability investing in real estate promised.			Your portfolio is breaking even and there is even some money left over at the end of the year. As long as nobody moves out all is good.			You know that buying right, accurate forecasting, and maintaining the property to the neighborhood standard is the path.		
<b>3 Professional Management</b>	In your experience property managers are only out for themselves. They get paid first and that is their only concern.			You really don't know what your actual costs are but it appears the only one making money is your property manager.			You are suspicious of property managers. You have your properties under control. If something needs done you do it.			Your property manager is a partner in your profitability. Professional Management is an investment not a cost.		
<b>4 Rehab and Maintenance</b>	You do as little as you can. There is no use upgrading properties because the tenants will just tear them up.			You fear you are being overcharged by your contractor. You are not sure what you are paying for and why.			The only way to avoid getting ripped off is to do the work yourself. Tenants may have to wait a little longer for repairs but that's the way it is.			You have a collaborative relationship with your property manager who helps you collect and evaluate multiple proposals for.		
<b>5 Screening and Selection</b>	If an applicant has the money to move in you take it. Your cash flow will not allow you to evict non-performing tenants.			Your tenants almost never finish out their lease and you are always looking for new ones. You have no time to interview applicants.			Your properties are vacant longer than you would like because you have learned the hard way that you have to wait for the right tenant.			You have systems in place to 'screen in' those applicants most likely to pay their rent while abiding by fair housing laws.		
<b>6 Marketing and Advertising</b>	Your marketing strategy is a sign in the yard and an ad on Craigslist. The incoming calls are overwhelming.			You want to attract better applicants but you don't know where to begin. You need a system that reduces time on the market.			You are unsure of the market rate rent in your neighborhood but as long as you have cash coming in every month you are in good shape.			You benchmark your marketing and advertising against the most successful investors you know. Your systems are fool proof.		
<b>7 Accounting</b>	Your rent is often paid in cash and your income and expense records are incomplete.			You have the information you need to file your tax returns but have no idea what your ROI is or how you are doing financially.			You are confident that your books and records are in order and you are receiving all the deductions due you at tax time.			You receive a monthly P and L by property. You measure the success of each property against your plan and past performance.		
<b>8 Expanding Your Portfolio</b>	You would sell your properties today if you could pay off the mortgages. The last person you want to hear from is another agent.			You are upset that you let great deals pass you by. You realize that being overly cautious has cost you a lot of money.			You are an Accidental Landlord and/ or happy with the current size of your portfolio. Investing beyond what you have is too risky.			Your ultimate goal is a portfolio of mortgage-free properties that produce a steady stream of income. You want to hear about		

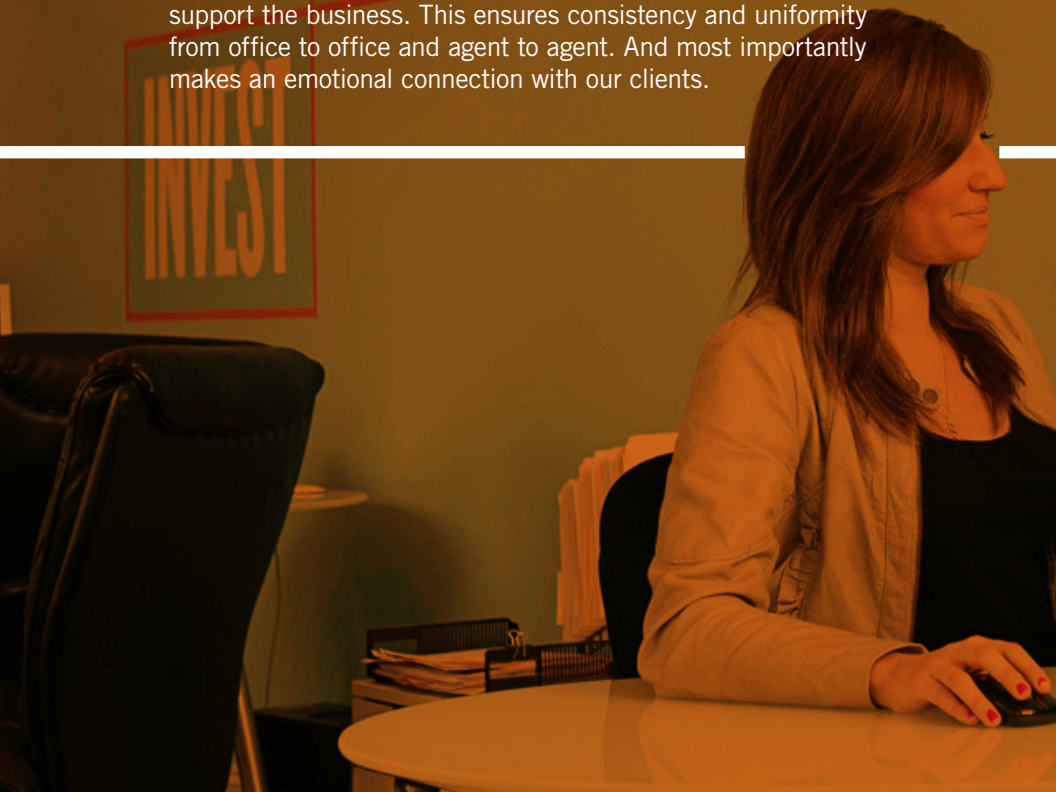


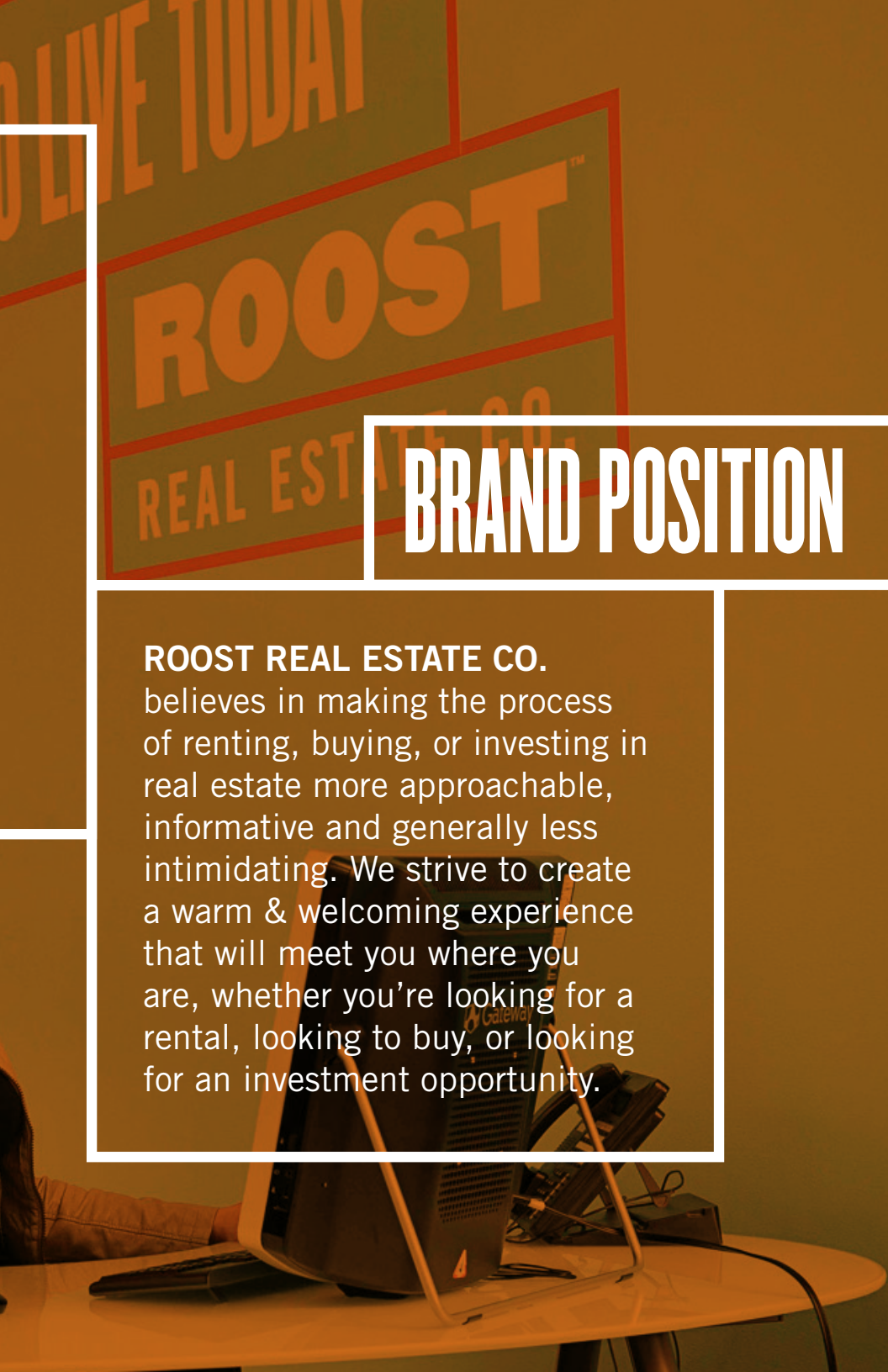
## Brand Position and Concepts

Back in 2012 I began a partnership with Andy Hayes, founder of Hucklebuck Design Studio to bring ROOST Real Estate Co. to life for our clients and team members. Andy's portfolio included branding for several prominent establishments local to Springfield, Ohio, as well as some work with nationally recognized companies based in Columbus. After several extensive meetings and interviews with me, Andy distilled the essence of the company I had in my head to four key attributes. The key attributes are *Smart, Passionate, Approachable, and Supportive*.

The key attributes and benefits of our brands is summarized on the following pages.

The ROOST Real Estate Co. brand and associated marks have been developed to embody our market position and value proposition. Each of our lines of business, have color themed and coordinated brochures, yard signs, web pages, post cards, billboards, stationery, business cards, swag, and office design elements that support the business. This ensures consistency and uniformity from office to office and agent to agent. And most importantly makes an emotional connection with our clients.





# BRAND POSITION

## **ROOST REAL ESTATE CO.**

believes in making the process of renting, buying, or investing in real estate more approachable, informative and generally less intimidating. We strive to create a warm & welcoming experience that will meet you where you are, whether you're looking for a rental, looking to buy, or looking for an investment opportunity.

# KEY ATTRIBUTES

---

**Roost makes the  
process easy to  
understand / not  
intimidating**

---

**Roost provides options  
for every stage in your  
life (rental/purchase/  
investment)**


---

**Roost offers a more  
laid back real estate  
experience designed to  
be warm and welcoming**


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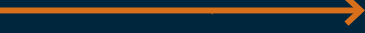
# KEY BENEFITS



**Empowered to approach  
ROOST knowing they'll  
be informed and helped  
along the way**



**ROOST will grow  
with you or meet  
you where you are**



**Strong customer  
loyalty and long term  
relationships**

## Bringing the Brand to Life

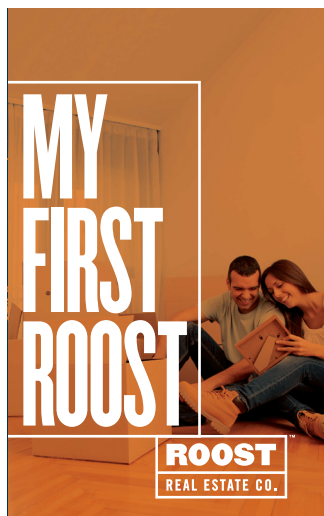




## Bringing the Brand to Life



## Bringing the Brand to Life





## Bringing the Brand to Life



**FOR THE WAY  
YOU WANT TO  
LIVE TODAY.™**

**ROOST**  
REAL ESTATE CO.

**BUY | RENT | INVEST**

14 E. Main Street | Springfield, Ohio 45502  
[www.ROOSTRealEstateCo.com](http://www.ROOSTRealEstateCo.com)  
 Contact Chris McAllister at 937-390-3715  
 or [Chris@ROOSTRealEstateCo.com](mailto:Chris@ROOSTRealEstateCo.com)



**ROOST**  
REAL ESTATE CO.

**FOR THE WAY YOU WANT TO LIVE TODAY™**

**START THE SEARCH FOR  
YOUR FIRST  
ROOST**

**MY FIRST ROOST**  
**MY NEXT ROOST**  
**RENT WITH ROOST**  
**MANAGE WITH ROOST**  
**OUR LISTINGS**  
**CAREER WITH ROOST**  
**PARTNER WITH ROOST**  
**OUR AGENTS**  
**ABOUT**  
**CONTACT**

**ROOST REAL ESTATE CO.**  
 14 E. Main Street, Springfield, OH  
 45502-0001 (937) 390-3715  
 1210 Mainwaring Drive Suite C  
 New Ross, OH 44066  
 (937) 427-2617  
 ROOST at The Park 40 E. Lincoln  
 Street, Cincinnati, OH 45219  
 Liverpool Ohio Real Estate  
 Brokerage  
 (513) 941-1001 (937) 390-3715

**MY FIRST ROOST**  
 Buying with ROOST  
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 Search Properties in Florida  
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 The ROOST Building

**CONTACT**  
 Contact information

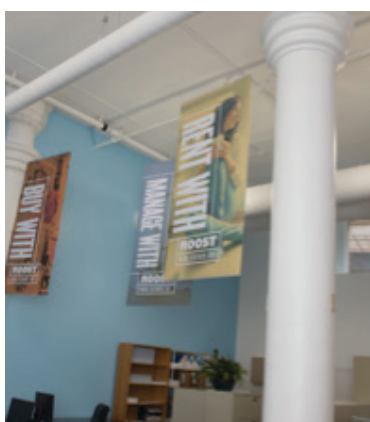
## Brick and Mortar

A real estate company's success is no longer dependent on the location of their office, or in some cases, even having an office at all. These days, most of our agents only come in as they need to, usually to meet a client, attend a closing, or to turn in a file and collect a commission check. Technology has given every agent the option of having their 'office' wherever they are. In new markets, we are exploring shared space facilities to obtain a great address at an affordable cost with an opportunity for expansion. A larger operation and a robust property management business will require something larger but the need for dedicated space for individual agents has long past.

The pictures below will give you sense of our office in Springfield, Ohio. It is not terribly fancy, but it is supremely functional. Any office should fit the needs of the business and the expectations of the local market.



## A Real Estate Broker's Guide to Entrepreneurial Success



## **The ROOST Culture**

The following core values of the company are critical to delivering the results our clients deserve. While we may be far from perfect on any given day, these are the actions and behaviors every ROOST team member aspires to consistently demonstrate. A career with ROOST is not for everybody, but for those who share our desire to transform the real estate industry, the potential for growth, achievement, and unlimited income potential is very real.

### **We All Are Free to Do What We Do Best**

My unique ability is creating business opportunities and strategies designed to support and add value to the lives of real estate professionals and clients. In other words, the highest and best use of my time is spent assessing situations, identifying problems, creating solutions, and working with clients and team members in implementing those solutions. I want my team members to be free to do what they do best as well.

### **Unique Ability Team**

At ROOST, we continuously strive to maintain a work environment where everyone is in a position to maximize their unique abilities. We want to ensure that each person is the right fit for each job. To that end, we are a Kolbe® client. ([www.Kolbe.com](http://www.Kolbe.com)) We use Kolbe to help us define our job descriptions and choose the right person for each job as part of our interview and hiring practices.

### **We Are Dedicated to Personal Growth**

ROOST Real Estate Co. is the result of many years of experience, and thousands of completed transactions and rental agreements signed. The one constant in our industry is change. The velocity of change continues to increase and we as real estate professionals have to be out in front of that change. We believe we are on the leading edge of what the 21st century real estate brokerage must be to meet both the challenges and the needs of the industry and our clients.

We want to see our team members realize their full potential both within the business and in their personal lives. We believe in the power of personal coaching and self-development and make these resources accessible to our team members. The nature of our business is that being licensed by the state is critical to being of greater value to our clients, making more money, and advancing within the organization. We support our staff members becoming licensed ROOST Real Estate Co. professionals if they so desire.

### **Opportunity**

There is no shortage of opportunity in our business. The key is to find ways to be of greater and greater value to our clients. We believe in abundance and the power of productive relationships. We reject the scarcity mindset of a transaction based business where our services continue to devolve into lower cost / lower value commodities. We are dedicated to expanding systems and networks of cooperation that multiply everyone's resources and results.

### **We Work by Referral**

Each ROOST Real Estate Co. office is a stand-alone, referral based, Lead Generation Machine. The fact that we work by referral is a key point of differentiation for us. We cultivate referrals from our tenants, owners, past and current buyers and sellers, and our individual spheres of influence.

### **Community**

ROOST strives to become an integral part of the fabric of the communities where we do business. We continuously look for "cause marketing" opportunities where our desire to contribute dovetails with our desire to communicate our brand and message to our target audience.

# What Success at ROOST® Looks Like



## Have an Ownership Attitude

When there is a problem, step up and take responsibility. Never report a problem without bringing a solution along for the ride.



## Create Value

Continuously look for new ways to be of greater use to our clients and fellow team members. Look for new ways to contribute and help our client's realize their goals.



## Take Initiative

Don't wait to ask permission to do the right thing when it comes to exceeding the expectations of a client. We expect you to do what is right.



## Focus on Results

The road to ruin is paved with good intentions. At ROOST® we trade on performance, not promise.



## Have Patience and Compassion

We serve a diverse client base with varied educational and socio-economic backgrounds. Not all of our clients will handle problems and conflict the way you or I might. Regardless, we will treat everyone we serve with the utmost dignity and respect.



## Take a Partner

Some of our challenges are bigger than we are, or at least seem that way. Take a partner with another team member or team leader. Don't hide bad news, thinking it will go away. If something feels wrong, it probably is.



## Never Give Up

Mistakes and breakdowns in performance are learning opportunities in disguise. You will make mistakes – our hope is that you will do all you can to never make the same mistake twice.

## THE SELF-MANAGING BROKERAGE™



**The Self-Managing Brokerage™** is our onboarding and training program for new franchisees. The initial training is an evolving work in progress. Our ultimate goal is to create our own Hamburger University (thank you McDonald's) for our broker owner partners and managers. The initial training is five days long including travel into and out of either Dayton or Columbus, Ohio. The training is held at our current home base of Springfield, Ohio.

The training expands in detail the processes discussed in this book, includes all the marketing materials and plans in place and in development, as well as presentations by our key vendor, advertising, tech partners, and preferred providers. The week is designed as a collaborative forum to ensure we understand the goals and desires of our franchise partners so that we may support their businesses as promised.

We are also designing training programs specifically for property management professionals and broker owners who wish to add this service to their offices. These training sessions will also be held in Springfield with the option of having our key personnel make onsite visits to our franchisees offices. We will be recording all our training sessions and making the videos available online to our franchisees as well.

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# **The Self-Managing Brokerage™**

## **Training Highlights by Day**

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### **MONDAY / TRAVEL DAY AND INTRODUCTIONS**

- About Real Estate Brands Ltd.
- Realizing Our Five Aspirations
- Kolbe 'A' Exercise

### **TUESDAY / IT STARTS WITH A CLIENT**

- The Client Experience
- Marketing and Advertising
- Working with Investors

### **WEDNESDAY / WHERE THE VERY BEST AGENTS DO WHAT THEY DO BEST**

- The Agent Experience
- The Agent Attraction Strategy
- Agent Training and Development
- The Agent Service and Technology Package
- Your Pay Your Way™
- Celebrating Agent Teams



## **THURSDAY / IT'S ALL ABOUT THE ENTREPRENEUR**

- The Broker Owner Experience
- Broker Profitability Matters
- QuickBooks Online
- The Cash Flow Forecaster™
- Managing with AppFolio
- Marketing with Mindset Scorecards
- Staffing

## **FRIDAY / FRANCHISE SUPPORT AND TRAVEL DAY**

- What You Should Expect from Real Estate Brands LTD.
- Brand Position and Concepts
- Brick and Mortar
- Ongoing Support
- Monthly Reporting



**CONCLUSION**

## Conclusion

So, care to join us? Our company as I write this is barely five years old in conception and well into our fourth year old as a going concern. In that time however, we have laid the groundwork for a scalable and sustainable enterprise that addresses the needs of the client, the agent, and most importantly, the broker owner.

We invite you to engage with us in a transformational journey. We need you to help us bring our brand to the world. We want to help more and more people live the way they want to live today, and help them get to where they want to be tomorrow. We want to partner with you to build the real estate brokerage you always wanted for yourself, your agents, and your clients.

I hope my vision for ROOST and Lucky Town reminds you something you have felt deep down inside your entire career. That there is a better way and that we and our industry are at our best when we partner with others who share our values and commitments. I want you to remember what it feels like when one and one make three.

$1 + 1 = 3$  is the essential equation for all success in the world. It is the magic spark. It is the motivation for making a difference in lives of our clients and the agents who serve them. It is the reason success is never fully understood. It is the equation you are shooting for when you desire to make your own dent in the universe.

Are there risks associated with joining what is essentially still a start up? Of course there are. However, if you share our vision for what a real estate brokerage should be, then you owe it to yourself to learn more.

If you want to share your thoughts and opinions with us, I urge you to take a few minutes and complete the Take a Look at Your Future Mindset Scorecard at <http://kys.coach/s/CIKk/TakeALookAtYourFuture>. For information about a ROOST Real Estate

## A Real Estate Broker's Guide to Entrepreneurial Success

Co. or Lucky Town Real Estate Co. franchise, please email me at [Chris@RealEstateBrandsLtd.com](mailto:Chris@RealEstateBrandsLtd.com) to request a Franchise Disclosure Document.



Our mission is to redefine the real estate brokerage business model by ensuring superior support and services for our clients whether they are renting their first apartment, buying their first home, their second home, investment property, or an empty-nest condominium. We want to be our client's real estate brokerage for life.

We plan to provide our future Franchise Owners/Partners with the tools and marketing muscle necessary to create multiple streams of income from all facets of the real estate industry. These streams of income include listing and selling real property, leasing and managing real property, and working with owners of investment property to ensure their properties are working for them and not the other way around.

As we continuously expand our client base, whether they be renting or buying, we expand the opportunities for our licensed real estate professionals to grow their businesses in a thoughtful and intentional manner. At ROOST Real Estate Co. our licensed professionals are the best in the business and are all dedicated to continuously adding value, expanding their capabilities, and deepening long term relationships with their clients.



## ABOUT THE AUTHOR

Chris McAllister was born and raised in Springfield, Ohio and graduated from The Ohio State University with a degree in Communication in 1982. He also earned a Master of Arts in Organizational Management (MAOM) in the late 1990's via the University of Phoenix online campus.

Chris worked in single and multi-unit retail management throughout the Midwest and Northeastern United States from 1985 through 2000. His last assignment was opening and managing Target stores on Long Island and in Queens NYC.

Chris returned home to Ohio in late 2000. He entered the real estate business as a licensed sales agent in Ohio in 2001. He earned his broker license in Ohio in 2003 and became a licensed broker in Florida in 2013. He was a RE/MAX franchisee from 2003 to 2009 and was affiliated with Real Estate II, a well-established local brokerage from May 2009 until December 2013. He founded ROOST Real Estate Co. in 2014 and Real Estate Brands Ltd. in 2017.

Chris's unique ability is creating business opportunities and strategies designed to support and add value to the lives of real estate professionals and their clients. Chris created ROOST Real Estate Co. as his platform for helping people get the most out of their real estate investments whether they are investors, owner occupants, or tenants.

**WE'RE HERE  
TO HELP YOU.  
SO GIVE US  
A SHOUT.**

**ROOST**

**REAL ESTATE CO.**

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