

PLACESTER

# The Boutique Broker's Guide to Delighting Agents and Winning Star Talent

Who is this for? You are:



**A broker**

who is striving to improve and wants to understand how your competition is operating.



**A team leader**

who's aspiring to take your business to the next level.



**A real estate agent**

who's curious about the types of support you might want from your brokerage



**This is a comprehensive guide to how boutique real estate brokerages are continuing to thrive by offering concierge services to their agents.**

**In this guide, you'll learn what leading boutique brokerages are doing to attract and retain the top agent talent in their markets, including:**

- Training and onboarding
- Business planning
- Networking and leads
- Marketing materials
- Transaction management support
- Compliance and supervision
- Coaching and accountability
- Culture and facilities
- ... And more, including how those brokerages hire and staff to execute these plans

# Who is this for?

## You are:

- A broker who is striving to improve and wants to understand how your competition is operating. You know there's a way to meet agent's needs and promote agent happiness without following someone else's playbook, and you believe that supporting agents to provide top-notch service to buyers and sellers is the key to long-term success in real estate.
- A team leader who's aspiring to take your business to the next level. You know a thing or two about hiring and staffing, and about what new agents and seasoned agents are looking for in their next career step, but you aren't sure what pieces of the puzzle you're missing, or how you'd fill them in if you knew what they were.
- A real estate agent who's curious about the types of support you might want from your brokerage. You like the idea of working for a company that's agent focused instead of purely commission focused, but you aren't sure how its provisions will measure up.

## You want:

- To get a sense for what resources and services boutique minded brokerages are providing their agents.
- To understand exactly how brokerages are providing those resources and services, from finding vendors to hiring full-time support staff.
- To determine how brokerages are supplementing in-person, one-on-one hand-holding with technology services and concierge support.
- To learn how brokerages maintain brand and marketing consistency within the company while also giving agents room to express themselves and customize their marketing.
- To better plan for agent training and onboarding so that agents are set up to start off strong from the very beginning.

## After reading this guide, you will:

- Have a deep sense of what makes top-producing real estate agents happy at boutique brokerages, and how those brokerages deliberately cultivate agent happiness.
- Know how service minded brokerages think about their business strategies and which agents they want to recruit and retain.
- Understand why training and onboarding is so critical, including how to create an onboarding checklist and use it to shape your agents' total experience.
- Learn about how training and onboarding support can work cohesively with ongoing technology training and resources at your brokerage.
- Get a sense for how brokerages think about technology tools and how to make them actually useful and relevant for agents.
- Determine how a handful of top brokerages think about generating leads for their agents and provide those leads (or coach agents to self-serve from their own markets).
- Dig into the marketing tactics that set these brokerages apart in their markets and keep clients (and agents) heavily involved and engaged.
- Scale those marketing tactics by providing consistent, quality services to agents via full-time or part-time in-house talent, third-party

contractors, or a hybrid mix of roles and responsibilities.

- Know what options for transaction management support are available and what would make the most sense for your brokerage, including ongoing compliance training.
- Develop ongoing coaching and accountability systems to keep agents growing and learning in a healthy and constructive way.
- Learn about how strategic partnerships with different companies can give your agents an edge in the market.
- Understand more about how top brokerages think about ways to continually support and cheer on their agents.

## PLACESTER

... And more

Ready to learn all about how to make your agents love you so much that they're essentially unrecruitable? Let's dig into it.



# Table of contents

## Introduction

Why should you strive to cultivate agent happiness? A philosophy	9
--	---

## Part 1

Strategy: What are brokers doing for agents to help keep them happy?	11
--	----

### Chapter 1

Start at the beginning: Whose happiness are you cultivating?	12
--	----

### Chapter 2

Best foot forward: Training and onboarding	14
--	----

### Chapter 3

Dialing in the dollars: Financial and business planning	23
---	----

## Chapter 4

Sparking agent happiness with technology support	28
--	----

## Chapter 5

Keeping the lead machine fed	33
------------------------------	----

## Chapter 6

Look at us! Managing marketing materials	36
--	----

## Chapter 7

Getting the deal to the finish line: Transaction management support	44
---	----

## Chapter 8

Buttoned up tight: Compliance and supervision	46
---	----



**Chapter 9**  
**I'm ready to play: Coaching and accountability** 47



**Chapter 10**  
**Hands across your agents' farms: Partnership synergy** 49



**Chapter 11**  
**The icing on the cake: Miscellaneous offerings that make the difference** 52

**Part 2**  
**Execution: How are brokers getting these things done?** 56

**Chapter 1**  
**Whom to hire first?** 57

**Chapter 2**  
**Brokers listing homes provide a unique advantage** 58

**Chapter 3**  
**Building a flexible do-it-all staff** 59

**Chapter 4**  
**Hiring for a teamerage model** 61

**Chapter 5**  
**Lean on me: Getting strategic with partnerships** 63

**Chapter 6**  
**Scaling walls: Craft the solution that works best for you** 66





## Introduction:

# Why should you strive to cultivate agent happiness? A philosophy

**Real estate has always been an industry where family-grown businesses successfully compete head-to-head with international franchisors across most markets. The focus on personal relationships, trust, and local knowledge means you don't necessarily have to be affiliated with a company listed on stock exchanges in order to thrive.**

It's still true that traditional real estate brokerages, grown from local roots, are everywhere—but it's not easy to attract the best talent and keep agents happy, and many of them are experiencing a squeeze, caught between lowering commission splits (an ever-spiraling race to zero) and providing higher-quality services for agents. Brokers are expected to offer more foundational support for agents than ever before, including technology tools, marketing support and materials, coaching, training, and the list continues.

And of course, it's not as simple as deciding that a brokerage will now provide A, B, and C services for its agents. There's an additional layer of complexity: How to deliver new or improved offerings consistently and affordably? And how to streamline systems and processes so that agents can focus on what they do best—sell houses?

We talked to thriving boutique brokerages across the country and dug into exactly what they're giving agents that goes above and beyond the competition in their market, and how they execute on those promises.

## Part 1:

# Strategy: What are brokers doing for agents to help keep them happy?

The brokers we interviewed have offices of all sizes, located all over the United States. Some support more than a hundred agents, while others are set up to provide top-notch support to a couple dozen sales stars.

They all had two things in common, however: Strong local market presence, and a mindset focused on agent happiness: serving their agents so that those agents can, in turn, provide the highest-caliber service to their buyer and seller clients.

## Chapter 1:

# Start at the beginning: Whose happiness are you cultivating?

There isn't any one way to think about the kinds of agents you want to hire, the culture you intend to create, or your company's vision and values. But one thing is consistent in the boutique brokerages that are able to create the most vibrant environments for agent happiness: The brokers behind them consider all of these variables and use them to determine everything from who they hope to hire, to how they plan to pay those agents.

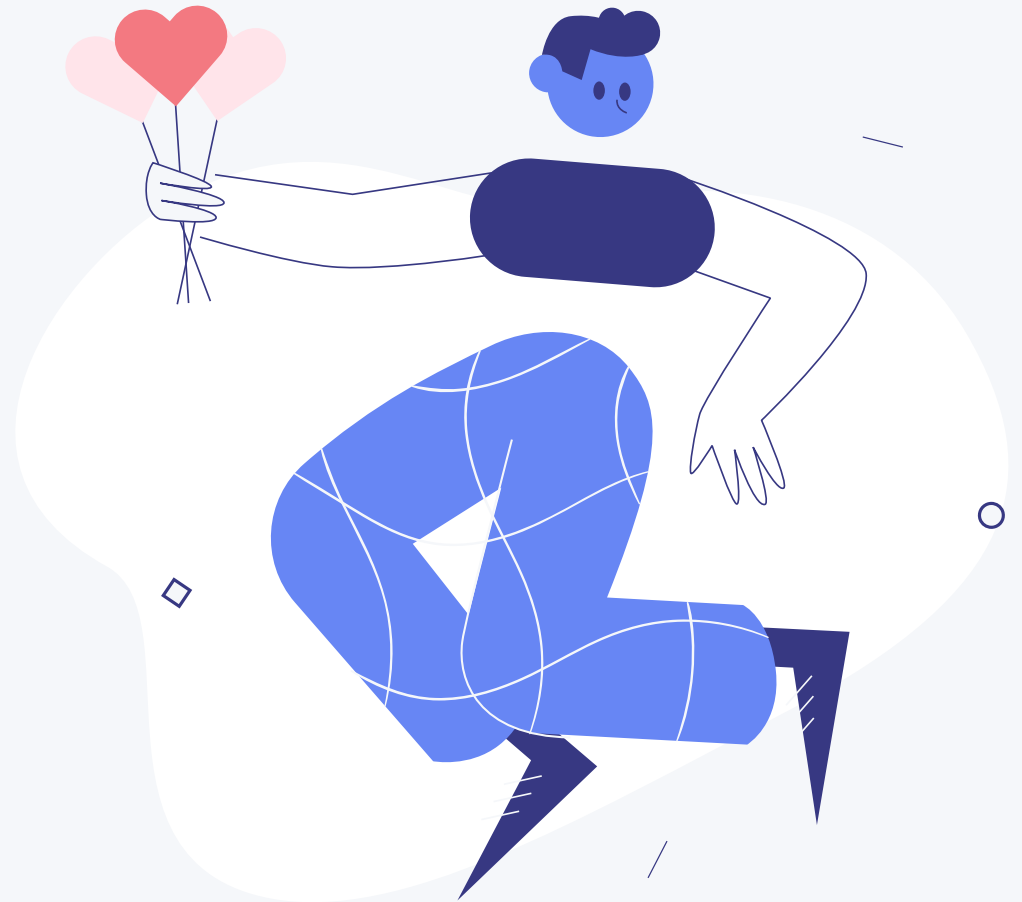
Some brokers will only consider bringing on agents who have already been active in the area for long enough to acquire a certain level of business; they won't talk to newer agents who aren't yet capturing

that market share. Others will happily bring new agents on board, but those agents have to show that they're keen and interested in growing and learning by investing in themselves (a bit more on that later).

How do you build a brokerage that's attractive enough to draw those high-quality agents? Commission splits are another leverage point, but they don't tell the whole story, and they're just one way to make agents happy. Some boutique brokerages find that a model offering different levels of support (and requiring different splits) works well for them, while others don't want to do any

“sweetheart deals” and want all their agents to operate consistently using the same systems and platforms, which cost money to provide.

It’s not uncommon for brokerages to charge fees on top of what might be considered higher-than-market-average splits so that they can provide quality, uninterrupted services and benefits to their agents, which will in turn allow those agents to close more deals, working with more clients, or possibly focusing on a higher-end niche. Whether to charge those fees and how much they are will depend on what your agents want or need to help cultivate a culture of happiness.



## Chapter 2:

# Best foot forward: Training and onboarding

Agent adoption of tools and resources is a challenge for many brokerages. Consider the CRM, arguably one of the foundational technology products in a real estate business: A collaborative study between Hubspot and REAL Trends found that just over half of agents (51.2%) were actually using the CRM provided by their brokerages. That must feel pretty painful to brokers, considering the cost; they're paying for every agent to have access to the platforms and software they're licensing. When only half of agents are using a critical business tool like a CRM, paying for unused software in an era of thin profit margins is far from ideal.

That's an expensive challenge for brokers—but it's one that can be tackled and eliminated from an agent's very first day if onboarding is approached with the appropriate mindset, and also through collaboration with vendors who understand these challenges and can work with you to find solutions. This could mean flexible billing practices, where vendors are tracking who's using their platform and only charging the brokerage for active users, or additional support and training to help agents understand how the platform can make them more efficient—or a mixture of the two.

Top boutique brokers begin showing agents that they're being set up for success and provided with a foundation of support as soon as those agents agree to join. According to Lee Adkins, Head of Growth at real estate consultancy Amplified Solutions, many brokerages have decent baseline processes in place (such as lead generation and marketing systems, for example), "but they're just not organized."

The onboarding experience should put the agent first. "One of the things I always teach is: Get your onboarding down before you get your recruiting fired up, because you spend all this time and money on getting the agent recruited, and if the onboarding experience is bad, it's not going to end well," notes Adkins.



## Document, document, document

So what constitutes a good onboarding experience? At the most basic level, brokers should create checklists documenting all of the different technology tools, cultural information, and other details that the agent will need to understand and absorb. Then, those checklists should be made available to everybody participating in the agent's onboarding, so that it's clear what the agent has (and has not) yet tackled, and what's left to teach.

If you don't have much of an onboarding process to speak of yet, then a checklist is an ideal place to start. Think about all of the different items and tasks that have to be completed before an agent is fully set up to list a home or sign a buyer-broker agreement with a client. Write them down, then organize them into some kind of chronological order that makes sense for your business.

Making an onboarding checklist also provides you with an opportunity to consider where you might be able to offer an agent a resource or tool that goes above and beyond what the competition is doing.

For example, not every agent finds it easy to manage their money, and if you tell them during onboarding that you'll be setting up separate bank accounts—one for brokerage fees, one for taxes, and one for the agent to pay themselves a salary from—then you might find yourself with a significantly less-stressed workforce during April, which is usually one of the strongest months for real estate sales in most markets.

We'll dig deeper into what some of these resources can look like and how different brokerages deploy them further along in the ebook.



# Brokerage Checklist

Here's an example of what you might see included on a typical brokerage onboarding checklist.

[Click here to download!](#)



**Agent Onboarding Checklist**

**Getting acquainted**

- ☐ Introduce the brokerage
  - ☐ History
  - ☐ Culture overview
    - ☐ Mission, vision, values
    - ☐ Expectations from agents
    - ☐ Promises to agents in return
  - ☐ Business overview
    - ☐ Brokerage niche and business strategy
    - ☐ How listing/buyer responsibilities are delegated
- ☐ Introduce managing brokers/broker-owners
- ☐ Introduce teammates/other agents
- ☐ Introduce office staff

**Marketing setup**

- ☐ Obtain agent-specific branding materials
  - ☐ New agent headshot
  - ☐ Write agent bio
  - ☐ Agent logo
  - ☐ Order business cards
- ☐ Create and launch agent website
- ☐ Set up or update agent social media profiles
  - ☐ Facebook
  - ☐ LinkedIn
  - ☐ Instagram
  - ☐ Twitter
  - ☐ TikTok
  - ☐ Clubhouse
- ☐ Set up or update agent portal/other online profiles
  - ☐ Realtor.com
  - ☐ Zillow
  - ☐ Trulia
  - ☐ Yelp

**Tools**

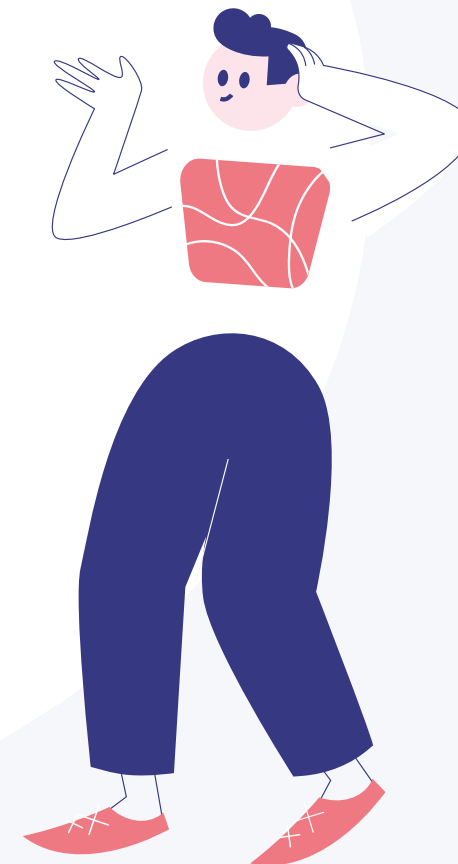
- ☐ Phone
  - ☐ Set up phone account
  - ☐ Set up agent voicemail
- ☐ Email
  - ☐ Set up account
  - ☐ Change signature
- ☐ CRM
  - ☐ Importing contacts
- ☐ MLS
- ☐ LockBox
- ☐ Transaction management

**Financial setup**

- ☐ Fill out tax forms
- ☐ Agent bank accounts
  - ☐ One for fees
  - ☐ One for taxes
  - ☐ One for agent to spend

**Training**

- ☐ Business planning
  - ☐ Lead generation
  - ☐ Prospecting
  - ☐ Agent sphere of influence and niche
  - ☐ Tracking progress
- ☐ Time management
- ☐ Processes and expectations
  - ☐ Working with buyers
    - ☐ Buyer-broker agreements
    - ☐ Open houses and home tours
  - ☐ Writing offers
  - ☐ Negotiating
  - ☐ CMAs
  - ☐ Closing
- ☐ Working with sellers
  - ☐ Listing presentations
  - ☐ Listing agreements
  - ☐ CMAs
  - ☐ Seller Disclosures
  - ☐ Marketing plans
  - ☐ Open houses
  - ☐ Negotiating
  - ☐ Inspections



Once you've got a clear idea of what should be on your onboarding checklist, you can ask yourself a few more questions to tighten up onboarding for agents:

- Who else needs to see this list of tasks and stay informed about where agents are with their onboarding and training?
- What do they think is missing from the checklist that should be documented?
- Does the checklist support your business as it currently exists? For example, if your brokerage model focuses on the rainmaker lead generation strategy, then the way you train agents around using their CRM will be different than a brokerage where agents are largely responsible for generating their own leads.

Blake Showalter, Operations and Client Relations Director for Middleburg Real Estate | Atoka Properties, says that streamlining onboarding at the brokerage has helped them ensure that agents understand the value of what the brokerage is

providing for them. "Our onboarding process is pretty intense, and it's very personalized," she says. "It would be a lot easier on us to just record videos and send it to agents and put it on them to watch—but we know agents aren't going to do that."

Instead, there's a master list of tasks and responsibilities that must be completed before onboarding is officially finished. Different parts of training are handled by different experts at the brokerage, and everyone can clearly see what the agent has completed and what's still left to be done.

They will also sit down with agents and talk about what's worked for them in the past and what hasn't, and how to plan moving forward. "That's our approach with agents in general. When we sit down and talk about their marketing, what works is what you do consistently," she says.

It's no secret that providing tools and resources to agents is a big expense, and this strategy also helps Showalter and her teammates evaluate their offerings and determine whether it's worth continuing. "If agents don't use it, we get rid of it. And we're very selective about what we offer. We want really solid adoption across the brokerage," she explains.

They strongly encourage new agents to take a boot camp training course called "The Indispensable Agent" that covers the nuts and bolts of being a real estate agent that they don't learn in licensing classes, from client skills to how to build a proper CMA.

## Provide transitions support

Even if agents are interested in making a move to your brokerage, there are very few people in the world who actively enjoy change. Understanding this has helped some brokers create an onboarding process that's as pain-free as possible—by hiring or appointing someone to manage the transition for the agent, holding their hand every step of the way.

At West + Main Homes in Denver, where Stacie Staub owns and operates several offices across the metro area, brand-new agents are set up with mentors who can help show them the ropes one-on-one. “We pull most of our trainings from the Ninja Selling program,” Staub explains, adding that it includes “everything from daily sales habits to how you manage your time to how you hold yourself accountable for those goals.”

Lane McCormack is the Chief Operating Officer for the Buckhead and Intown offices for Ansley Real Estate, a ferociously competitive boutique brokerage in the Atlanta market. She explains that the different Ansley offices all have minimum standards for agents they'll consider bringing on board, depending on the market; in their Buckhead office, that minimum standard is comfortably lodged in the seven-figure range.

It means they're able to recruit some of the best agents available in Atlanta to come work for Ansley, but it also means that their agents demand quality from the start. “Everyone on our staff has incredible experience, and we want to use our resources to help people who are already growing their business,” McCormack notes.

At Ansley, they've created a range of resources that explain the brokerage's history and philosophy, from videos to printed materials, including background on the leadership team. This way, they can provide their prospective agents with the information that will help them make the decision to join—in whichever format is most comfortable for the recipient.

And once that agent decides that they do want to join, they meet Ansley's transitions manager. "What she does is she really takes the agent and holds their hand through the process of transition." That includes everything from the paperwork and transitioning their license to a new brokerage, all the way to one-on-one systems training and helping walk new agents through everything they need to do when they land their first listing.

"She anticipates the need before the new agent asks for it," McCormack notes. "And we've had incredible

feedback that she has made the process so much happier and simpler," engraining agents into Ansley from the first day. "It also prevents the fear," McCormack adds. "When you say, 'Here's a new system; watch a video and learn how to use it'—agents aren't going to do that." But they will sit down with someone who's willing to show them exactly what to do.

## **Culture-heavy from the start**

The culture and history at Wemert Group Realty in Orlando is, like many boutique brokerages, one of the biggest facets that sets it apart from its competitors. Emily Smith, Chief Operating Officer, explains that the company began life as a team within a large, well-known franchisor; now, it operates as a "teamerage," a sort of hybrid business model offering white-glove support for its agents.



“We’ve worked really hard to figure out how to stabilize our onboarding process because it’s a lot to try to figure out how to integrate people well,” she explains.

Onboarding starts before an agent’s first day. “We have a team runner who will deliver a gift to the front door a day or two ahead; it says ‘Welcome to the Team.

They need to know they’re stepping into the middle of a really great story, and there’s been great effort put in up to their entry point.” They also work to incorporate the agents into the story and impress upon them that their chapter will help shape how the rest of the plot unfolds.

Culture is a big emphasis in onboarding at Wemert. “We’re very competitive with the market and want to win on behalf of our clients, but we don’t compete

with each other; we cheer each other on and help each other. And we teach them that from day one.”



There’s also a designated Director of Agent Services, who works closely with new Wemert agents as they learn the ropes and get their bearings. She’s also heavily involved with helping agents manage their databases and leads; working on onboarding helps her understand every agent’s database and gives her the opportunity to start integrating her team into their lead funnels as soon as possible.



## Chapter 3:

# Dialing in the dollars: Financial and business planning

Agents deal with huge financial transactions every day, but it doesn't always follow that their own financial lives are neatly buttoned up, or that they're always thinking about where their leads are coming from (and acting accordingly). Brokerages that accommodate their agents by furnishing them with personal financial planning and broader business strategies show that they truly understand what agents need—and can make sure they get it.

One small thing that can make a big difference: Are you set up to direct deposit agent commission payments? It's standard operating procedure for payment across many industries, and few people prefer to wait for paper checks to clear.

## 1099 ducks in a row

Most agents are contract employees, paid on commission—and for the most part, everybody likes it that way. However, living on commission checks isn't a skill that most of us were taught, and it can be especially difficult for agents who are moving to real estate from more traditional, salaried careers.

When agents are worried about when they'll get paid again, let alone how they'll manage to file their taxes or pay their brokerage fees, then they're usually feeling stressed about the situation. And when agents are stressed, you can be pretty sure they're probably not providing the best potential service to their clients.

We mentioned earlier the possibility of setting up different bank accounts for your agents during onboarding to help them manage their money. Separate accounts for taxes, health insurance (if they

aren't on a partner's plan), required brokerage and marketing fees, and for the agent to draw from and live off can alleviate a lot of stress for your agents, but that's not the only service you can offer.

Would it be possible to recommend a bookkeeper or an accountant for your agents, one who specializes in helping people in real estate manage their money? This kind of financial education and benefit suite can get wrapped into existing networking or peer support groups, where you can offer discussion topics for agents who are learning how to manage their money.

If an agent decides to incorporate their business and use that structure to pay themselves a salary, set aside funds for health insurance, and otherwise serve themselves in that regard, then brokers can support those decisions by offering documentation and filing help through the brokerage compliance



team, for example. When a team of people is helping your agents navigate these financial barriers, then you can feel confident you're helping your agents secure their futures as effectively as possible.

Longer-term: What kind of real estate-specific retirement opportunities or information can you deliver to your agents? Can you also provide connections to retirement investors or other resources that can help them build up a nest egg for the future? Is it possible for you to create some kind of incentive or high-yield savings program for agents who are trying to get a down payment together for their own house?

At the very least, giving agents some basic coaching around budget-balancing and other skills will help them feel like you know what they struggle with daily, and you've got their backs to help them manage it.

## **Do agents know how to plan for their next meal?**

Whether your business model is set up to support highly productive and experienced agents (and you don't hire new agents at all), or whether you're taking more of a "teamerage" approach like Wemert Group Realty, supporting agents around business planning can be an important addition to your portfolio of offerings.

The teamerage approach means that for the most part, agents are not responsible for lead generation at Wemert Group Realty—but unlike most teams operating under real estate brokerages, agents are not split into buyer specialists or listing specialists. Instead, it's important that every agent be able to operate at a high level across both roles.

“For a long time we had listing specialists and buyer specialists, but over time we realized it wasn’t the best thing for relationships, or the database and creating a database-driven business,” Smith explains. “So we have shifted to having every agent become an expert on both sides.” That enhanced client experience and relationship throughout the sales and purchase process with a single agent has helped elevate and protect the repeat and referral business that Wemert Group Realty captures in its market.

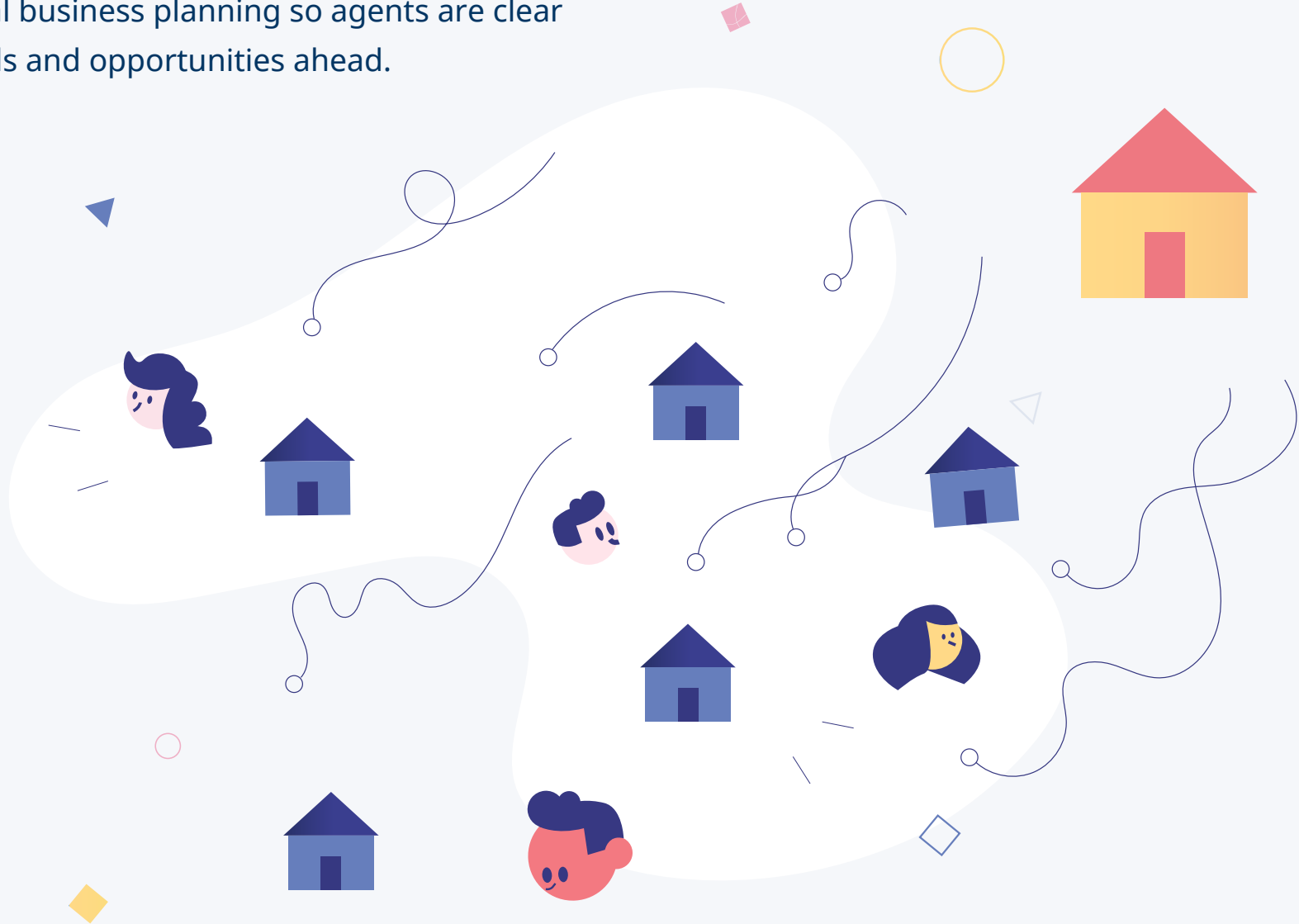
At Middleburg Real Estate | Atoka Properties, agents are coached to start generating their own leads from the very beginning. “We understand that some agents want leads, and we know for new agents it’s important to build their business, but we do a different approach,” notes Showalter.

Established agents use listings as their pipeline to capture new business; there’s a lead team that will

follow up with any leads that come in through the favored portal if the agent hasn’t responded within the designated time period. It works well for agents who have been working in the market already for some time, but new agents are going to need more coaching around lead generation before they start listing homes for sale.

The brokerage partners with a sales coach, partner/owner/agent Scott Buzzelli, who sits down with brand-new agents during the onboarding process. “We know every agent has a sphere, and long-term, that’s how an agent is going to build their business,” Showalter says. “That’s something he is extremely good at—sitting down with an agent and figuring out, ‘How do we get that list of 150 people who will build your business?’”

He also works with the brokerage to provide ongoing support for agents throughout the year, and he offers annual business planning so agents are clear on their goals and opportunities ahead.



## Chapter 4:

# Sparking agent happiness with technology support

We know: It's really not always easy to set yourself apart when it comes to technology platforms. There might not be much competition for transaction management tools, for example ... and most brokers have learned that switching from one system to another often creates as many new problems as it solves old ones.

However, it's also a given in 2021 that agents do expect certain things from their brokerages, and for better or worse, technology tools to help streamline their duties and get transactions across the finish line are always going to be on the list.

At the very least, agents will expect brokerages to offer some kind of technology solution (paid or unpaid) for:

- A CRM
- Transaction management for both listings and buyers
- Digital document-signing, in most markets



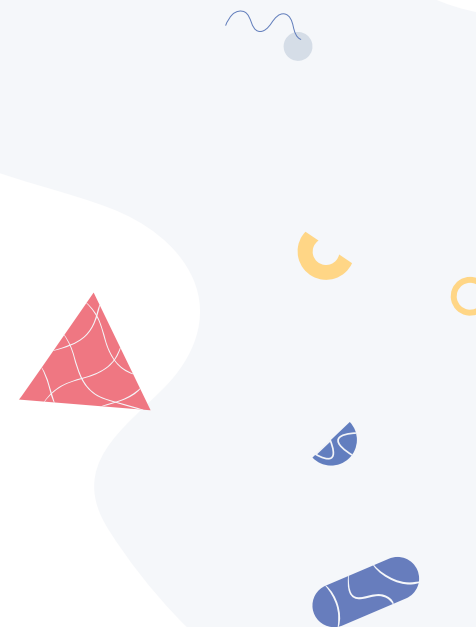
Those are the bare minimum. Most brokerages are also expected to offer some kind of technology solutions around:

- Website production and marketing
- Social media marketing
- Compliance
- Coaching
- Networking or lead generation
- ... And the list goes on

For most boutique brokerages, this will mean outsourcing or contracting for these technology tools and services as opposed to building them in-house. That's more or less a given; what's left to determine is how to handle ongoing training and support around those tools. Brokerages have a choice between creating a training repository of "how-to" materials that agents can look up at will after onboarding, setting up some kind of group

- sourced system to offer training and support, or designating an in-house expert whose duties include (but might not be limited to) learning everything there is to know about the technology tool in question—and training and updating the rest of the team on a need-to-know basis.
- Whether or not you use videos or document guides to train agents during onboarding, it's a good idea to have an easy-to-navigate bank or brokerage wiki of some sort that walks agents through basic tasks that might have slipped their minds since training. Use the onboarding checklist as a jumping-off point, then build your guides from there.
- “Provide on-demand, easy-to-understand ongoing training,” suggests Adkins. “Some sort of intranet service, easy links to find videos, and include a link in your company-wide email every

week: ‘Here are our brokerage training materials.’” This way, you can make it easy for agents to easily find details on how to automate birthday gifts or greetings for their clients in their CRM, or the steps they need to take to send out an email newsletter to their sphere of influence.



What if the agent needs a refresher course on something that isn't included in your repository, or needs to learn something that wasn't covered in onboarding at all? The next step is to set up some way for agents to ask questions about the tech tools they're using.

Too many brokerages aren't giving agents any way to request support, and the result is that agents' plan to get help is: "I'll just call the broker-owner or front desk," says Adkins. (Sound familiar?)

"There's no plan for how to get the help. They're emailing, asking, texting everybody who's the wrong person—or they don't know what to do, so they don't do anything."

Realistically, it is not a simple task for brokers to set up ongoing tech support help for every tool their agents might be using, up to and including email and

and Facebook. But there are still ways to solve this problem without leaving agents out to dry.

Adkins recommends setting up a tech support channel in your Slack platform or your Facebook Workplace, where people can ask questions and groupsource solutions in a protected and internal environment. Setting up a ["techhelp@yourcompany.com"](mailto:techhelp@yourcompany.com) internal email address is another option that can scale with you as you grow; you can always designate that email address to different people or groups without asking agents to change their behavior around how they seek support.

"Are you creating a culture where people feel like they can get an answer and it's not all a scramble?" Adkins asks. "Be organized enough so that agents know where to go."

Best-case scenario: You designate a go-to tech point person at your brokerage. Possibly even one for every different platform that you use. And of course, vendor selection is important; a tech vendor that can provide you with dedicated support representatives, and an actual human you can call and beg for help if everything breaks one day, will be a lot more help than one that requires you to call a generic phone number or send an email using a form.

The transition manager at Ansley, who holds agents' hands throughout the entire onboarding process, is the result of Ansley's tech partnership with the Chicago-based boutique brokerage @Properties. The system includes a CRM, marketing tools, CMA builders, internal communications, and transaction management rolled into it, and part of the transition coordinator's job is to know the platform (literally called pl@tform, in this case) up and down.

"The transition manager has been what I call the secret sauce to help an agent feel good," notes McCormack, "because now they can go to our transition manager and the office manager and the managing broker for questions, and they feel like they've really got a lot of coverage for what they need."



## Chapter 5:

# Keeping the lead machine fed

Not every brokerage prioritizes creating a lead pool for agents because there are some agents who prefer to work their spheres independently. But if providing leads to agents is part of the value that you offer to agents as a brokerage, then it's smart to determine the best way for leads to support your overall business strategy—and how you want to go about providing and distributing them to your agents.

At West + Main, Staub has reallocated a portion of the brokerage's marketing budget to drive more leads to the website for agents; buyers and sellers are forced to register in order to request to view listings online, to visit a home in person, or to obtain a home value as a seller.

Those leads then get distributed to agents through the company's CRM—or, in the case of quick-showing requests, the agent who's scheduled for floor duty at



the office is ready to go out and show the prospective buyers the house. “When they work a floor shift, they’re guaranteed a lead,” Staub says.

One of the markets Ansley has been able to capture in Atlanta is the coveted developer services segment; McCormack notes that due to the company’s relationship with new construction builders, the brokerage is able to offer agents some leads in those areas as well as others.

In the case of teamerage Wemert Group, Smith explains that “it wasn’t about building the biggest, baddest real estate team on the planet,” but instead the focus of founder Jenny Wemert was to serve “the next family in front of them at a high level. And when they ran out of bandwidth because they had too many families to serve, they’d hire more agents.”

This philosophy means that Wemert has established itself and thrived as a rainmaking interdependent

model. Smith says that 40% of the brokerage's business in 2020 was repeat or referral-based, "which is a little bit unheard of when you get up to our volume." So Wemert agents know that leads are always available for them to tap.

"We can provide the leads as they're stabilizing their database—or, if they have a great, amazing, stable database, but there's a gap between what they expect and what they're seeing, they can at any time reach out and put their hand back into the lead machine and start working with a new family." That stability allows agents to focus first and foremost on getting those deals done, while generating leads and marketing is something that the brokerage provides.

To ensure that no leads slip through the cracks, especially the highly valued repeat and referral business, Smith explains that Wemert has a Director of Agent Services who essentially serves as a leads manager for agents.

"She watches over our database, and she has a small team that watches for opportunities for our agents—looking at databases and noting that we didn't touch this family this year, which helps as leverage from the brokerage, to make sure that the opportunity is not missed by the agents."

If you didn't remember the other primary responsibility of the Director of Agent Services, you can probably guess by now what makes the most sense at an boutique brokerage—she's also heavily involved in Wemert's training and agent onboarding.

## Chapter 6:

# Look at us! Managing marketing materials

Following the Ninja Selling strategy means that Staub at West + Main Homes has to think about what she's providing her agents in terms of materials for reaching out and talking to their spheres. That includes a glossy lifestyle magazine with all-original content, branded merchandise, direct mailing materials, and social media listing materials that align with West + Main's aesthetic.

The blog is a powerhouse on the website, consistently producing new content around Denver-specific real estate interests. It goes well beyond the typical "here's a new listing" posts (although their listing posts are beautifully teased on social media and executed on the website) and delves into real estate market trends, home design and architecture pieces, finance advice, home maintenance and home improvement, gardening, cleaning, mortgage rates, local artists and makers, and things to do in and around the city.

“It’s all done through a really streamlined process—everything from listing marketing to any other kind of marketing request,” says Staub. There are forms set up for any form of marketing an agent might want to do, “down to if they want to submit a project to be featured in the magazine.”

The magazine features West + Main listings and agent projects on the covers; it’s mailed out directly to clients, and Staub says that her agents typically order extra issues for open houses and meetings with people. (We’ll share more about how the brokerage manages to produce a magazine and sell real estate a bit later, but here’s a hint: The in-house marketing team includes print design and writing expertise.)

Ansley uses a similar templated form model, where agents can upload their marketing materials and manage them from anywhere. “If I took a new listing today, I could upload the pictures of the home and,



within five minutes, have a social media post already ready to go and posted,” McCormack explains. That’s hosted in-house so that agents get a consistent experience, and the branding remains dialed-in and immediately identifiable as Ansley.

The brokerage employs eight graphic designers, an art director, and a senior director of social media and agent marketing, who works one-on-one with agents to cultivate social media plans and also handles the company’s social media in-house.

At Wemert Group, marketing requests for things like personalized listing materials are also automated. “We have two professional photographers on staff, and they go out and take care of all the inner marketing team’s needs,” outlines Smith. “We have people in the office focused on listing marketing, and then people focused on brand marketing.”

The brand marketing support allows agents to request specialized materials for their farms or markets; for example, an agent who’s focusing on farming their gym community might put in a request for branded hats or water bottles. There are forms they can fill out to get that done, but Smith adds that they want their agents to feel like they have access to the marketing team, “so they can text the marketing team and get help. Our staff is stable; they either work from home or the office, and agents can text or call, and then marketing stabilizes the request in their own system.

“We’ve tried to make it as easy as possible for the agents,” she adds.

As a brokerage that relies so heavily on repeat business—and staffs a team to make sure nobody in the database falls through the cracks—Smith notes that Wemert also goes to great lengths to ensure that former buyers and sellers receive birthday

cards, “home-aversary” cards, and other special touches.

In December the first year after you’ve bought a house with Wemert, you’ll receive a customized ornament in the mail as a gift. “We prebuild those packages through the year,” Smith discloses, noting that it’s easier to tackle piecemeal than all at once in December.

They also send out lottery tickets with “lucky to know you” notes, holiday packages (this year for Thanksgiving, they distributed a cookie theme: potholders with a low-key logo, a wooden spoon, cookie mix, and a house-shaped cookie cutter), and other small items to let clients know they’re thinking about them.

Like West + Main, Wemert also hosts client events. “Typically, we’ll rent out movie theaters during the year, or water parks—some pretty major events,” Smith says.

And Smith adds that the experience itself has to be a marketing experience for clients. “If they remember that we were problem-solvers and solution-based, and we guided them with what’s next, they’re going to feel like we’re really capable,” she explains. “If you sell a home, we’ll do a personalized photo book of the client’s pictures of the home they sold. Those have made people cry at closing tables.

“We have a couple of touches that are too fluffy for investor clients, but agents can pick and choose depending on their databases,” Smith concludes.

At Middleburg Real Estate | Atoka Properties, brand strategy is important—but as Showalter explains, “we have found that for agents, their brand is just as important as our brand, and we want them to all be cohesive.” To ensure that, they have a staff designer who works with agents to create personalized logos and other marketing materials that fit within the brokerage’s brand, including a brand board for each agent.

The process currently includes a consultation with agents, creating concept boards, sending mock-ups and proofs for agent review, and then delivering the final brand boards and logo assets.

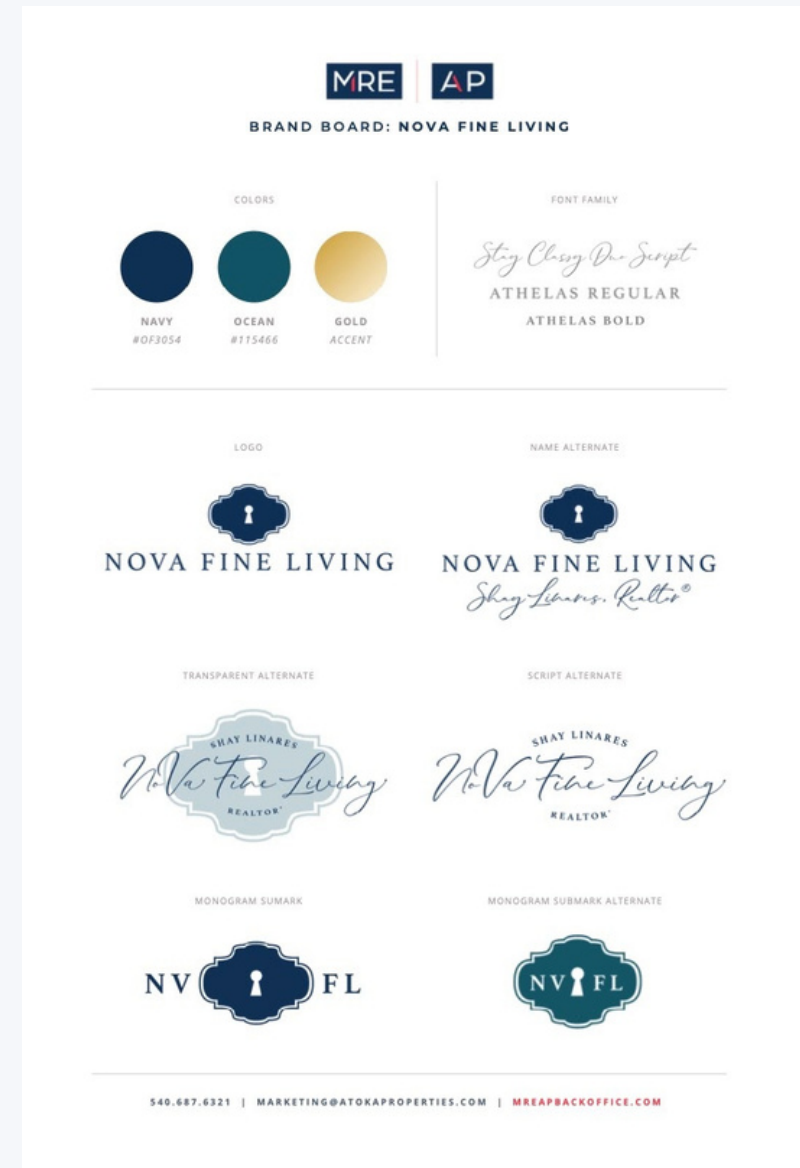






Agents get logos in different color versions and file types, and part of the process includes walking agents through adding their new logos onto their websites, listing presentations, and other basic areas where they might want to include it.

The brand boards include approved colors, typefaces, logo alternatives, and other details an agent needs to ensure their brand is consistent within and with the brokerage.





## BRAND BOARD: THE INDIGO GROUP

### COLORS



NAVY  
#0F3054



LIGHT BLUE  
#AAD1F4



STEEL BLUE  
#7F99B4

### FONT FAMILY

Charlton  
KOLLEKTIF

### LOGO



### DARK ALTERNATE

### LIGHT ALTERNATE



### WORDMARK



THE Indigo GROUP

540.687.6321 | [MARKETING@ATOKAPROPERTIES.COM](mailto:MARKETING@ATOKAPROPERTIES.COM) | [MREAPBACKOFFICE.COM](http://MREAPBACKOFFICE.COM)

“If we can’t offer the service on the level that our agents want, then we find a company we can direct the agents to, that has all our branding assets,” Showalter explains. They work with agents on social media to make sure that everything aligns not only with brand but also with the agent’s own personality —“agents can’t outsource social media unless they have someone who knows them personally, so their social media goes along with their brand,” she notes.

Middleburg Real Estate | Atoka Properties also focuses heavily on hyperlocal resources and marketing, much like West + Main, so they offer a wide spread of neighborhood guides, community resources, and other local tidbits; Showalter says their community content captures about 40% of the website’s traffic now. They also use in-house creative talent—designers,

writers, creative directors, sometimes interns—to make and update the community content. When they send out a brokerage newsletter, they'll include a link to a resource (such as a restaurant guide) to go along with their “just listed” details, for example.

Although print marketing (yes, we're talking about newspapers) is likely considered an old-school tactic, “it's worked for us,” Showalter says, and they run a combination of listing ads and general branding ads. They also print the community resource guides, which include information about buying or listing a house, and make those available in offices for people to pick up and flip through.

Because the agents who work at Middleburg Real Estate | Atoka Properties operate under specialized marketing programs, Showalter says they can handle their agents' direct mail and other print needs in-

house. “We have very few agents who do direct mailers, but the ones who do are very consistent,” she says. “We have one agent who, every single listing, he does a postcard for coming soon, just listed, under contract, sold.” They've created templates that agents can use to order and print the postcards, and then a local company prints and mails them for the agents using the latest version of the mailing list.

## Chapter 7:

# Getting the deal to the finish line: Transaction management support

Not every brokerage wants or needs to employ transaction coordinators or other support positions, but for some, it's a crucial component of keeping agents focused on their highest-value tasks.

Wemert Group Realty uses client care coordinators on staff. "That's a pretty major part of agent support," Smith notes. "They have someone who's going to pick up and start going forward as soon as they execute a contract on the buy side or list side."

Using coordinators means that agents not only have a consistent experience, but they can also position

their coordinators as a partner in the office who'll be helping out with the deal.

The transaction coordinators at Wemert are a far cry from a contracted (but valued) position at many other brokerages. They've set up these coordinators to work personally with a group, or tribe, of agents, and the coordinators help manage those agents even as they work to ensure that all of their transaction i's are dotted and t's are crossed. They have monthly meetings with their tribe members and help the brokerage communicate changes or shifts to the agents.

“What has really set us apart and lets us grow wider and deeper is putting people in these tribes in a way that makes sense, so the agents have stability,” explains Smith.

And it attracts a higher quality transaction coordinator to the mix, too: “People in an admin seat have a lot more power over their seat and feel like they have a purpose.”

In Adkins’ opinion, for a smart broker, “transaction coordination should be a small profit center.” A small markup can keep processes running smoothly and ensure agents always have the level of transaction support they need.

## Chapter 8:

# Buttoned up tight: Compliance and supervision

At the end of the day, real estate transactions are legally binding agreements involving the transfer of tens of thousands of dollars (and more likely hundreds of thousands of dollars), and for a lot of brokers who want to compete for the top agent talent in their market, providing something more than access to basic errors and omissions insurance is one way to stand above the crowd.

Greg Fischer, CTO at West + Main Homes, notes that the compliance team at the brokerage has created separate checklists for buyers, plus pre-listing and post-listing items to tackle. “Agents have a template or a roadmap or milestone for what they should be

shooting for and what the components of an end-to-end transaction are.”

The brokerage is also able to navigate changes in the market with the help of the compliance team. When the pandemic emerged in 2020, the team put together a coronavirus addendum that would help agents pause transactions where buyers or sellers had contracted the virus.

“Our compliance team does an awesome job creating, templating, and auditing all those checklists, but also doing evergreen and on-the-fly training for how to navigate things that come up.”

## Chapter 9:

# I'm ready to play: Coaching and accountability

Onboarding agents and supporting them through transactions is only part of the puzzle and therefore will only take you so far as a brokerage.

Accountability and keeping agents actively growing in their business is critical to boutique brokerages.

“Whether it’s opt-in or cohort groups or whatever—it can be a book club,” says Adkins. “But you need some sort of culture-building thing where people in the office who might not normally be linked up can connect.”

He’s created “mastermind” groups for agents at different levels so that they can feel comfortable

asking questions in front of peers. “Here’s a team of more than ten people; let’s put teams of more than five people in another group; and all the solo agents in a room. They’re the ones who are terrified to ask a question in the room, and they don’t want to ask how to use the CRM in front of the top-producing team leaders.”

Cohorts or peer groups can also be set up as office hours, he suggests. “It’s not rocket science, but those are the things that you can’t just install in a brokerage.”

Staub at West + Main has created some accountability groups for her agents in the wake of the coronavirus (a bit more about that later), and she's also created an "agent pro" program that includes blog posts, a regular newsletter, and a calendar with educational opportunities for agents, whether or not West + Main is hosting them. However, her Genuine Hustle events have been an organic recruiting tactic for her brokerage, and a good number of new agents she hires find her through the event, which features speakers from all across the real estate industry sharing tips and hacks.

The focus at Middleburg Real Estate | Atoka Properties tends to be "partnering with agents on a one-on-one basis to guide them," explains John Showalter, the brokerage's Technology and Agent Success Director.

"Long-term, we work with agents on more of an individual basis," he says. "We email everyone and announce it on calls and say we want to help you with your business plan, and we'll book time to go over your year plan and figure out what that looks like for you."



## Chapter 10:

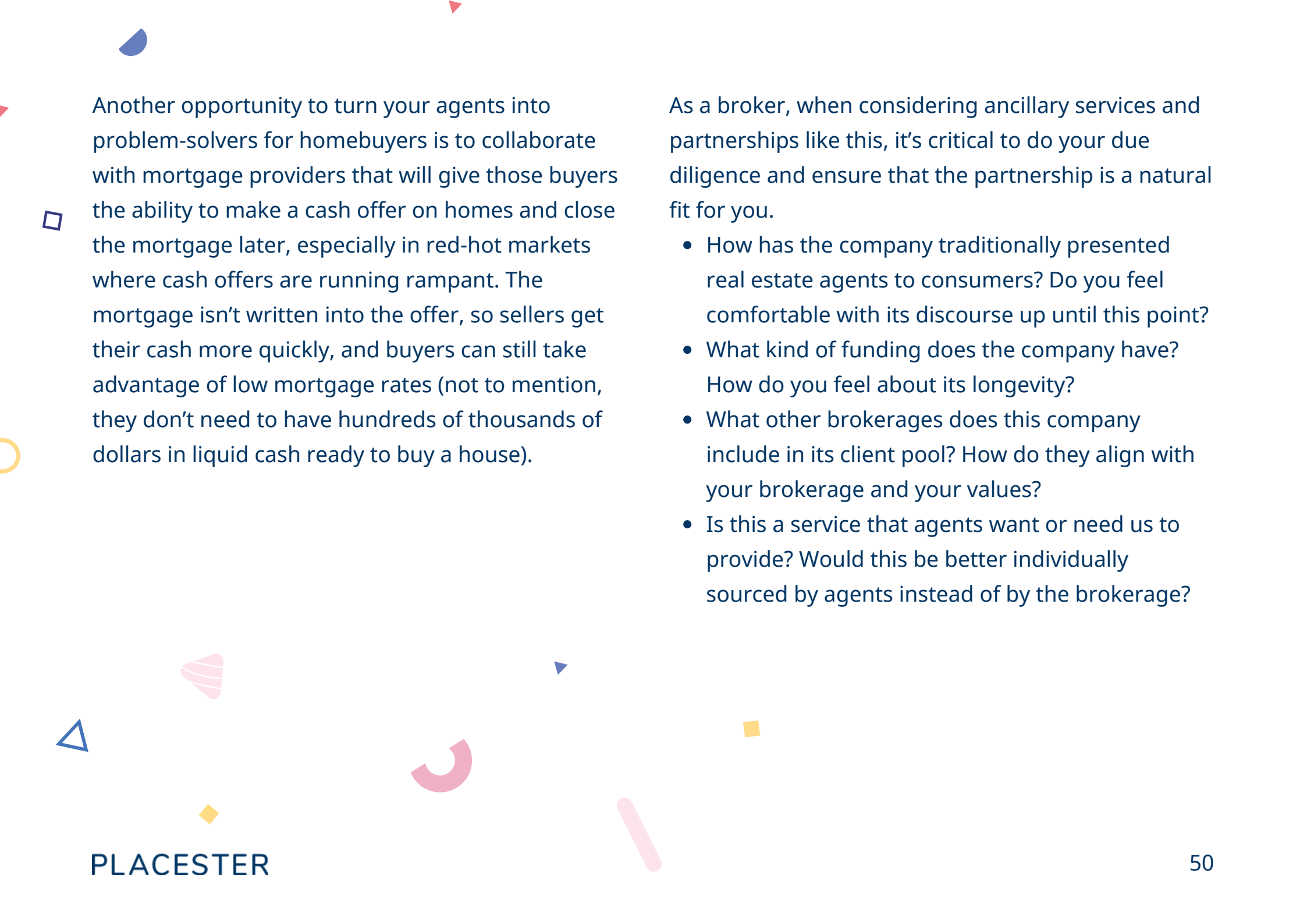
# Hands across your agents' farms: Partnership synergy

We've mentioned a few ways that partnerships or relationships with different companies can help support your agents—accounting and taxes, financial planning, and so on. Another way brokerages can give agents an edge is by working with ancillary services that solve different problems for buyers and sellers.

One time-tested and ongoing example is partnering (legally!) with local lenders who help buyers navigate down payment assistance programs. You'll need to ensure there are no kickbacks or other questionable partnership behavior taking place, of course, but giving buyers somewhere to turn if they feel stuck and unable to figure out how to make a purchase

happen is a huge value-add for you as a brokerage, and for your agents.

New service partnership opportunities might introduce sellers who are hesitant to sell their house before they buy (and who also don't want to try to win an offer in a hot market with a sales contingency written into the contract) to a bridge solution. This type of service will offer homeowners a minimum price for their current house, so they can start shopping for a new home with an understanding of their budget, and allows them to both avoid a sales contingency in their new home's contract and alleviate the stress of uncertainty around buying and selling at the same time.



Another opportunity to turn your agents into problem-solvers for homebuyers is to collaborate with mortgage providers that will give those buyers the ability to make a cash offer on homes and close the mortgage later, especially in red-hot markets where cash offers are running rampant. The mortgage isn't written into the offer, so sellers get their cash more quickly, and buyers can still take advantage of low mortgage rates (not to mention, they don't need to have hundreds of thousands of dollars in liquid cash ready to buy a house).

As a broker, when considering ancillary services and partnerships like this, it's critical to do your due diligence and ensure that the partnership is a natural fit for you.

- How has the company traditionally presented real estate agents to consumers? Do you feel comfortable with its discourse up until this point?
- What kind of funding does the company have? How do you feel about its longevity?
- What other brokerages does this company include in its client pool? How do they align with your brokerage and your values?
- Is this a service that agents want or need us to provide? Would this be better individually sourced by agents instead of by the brokerage?

As an agent, the appeal to working with a brokerage that can do this is clear. It elevates the agent from a local market specialist to someone who understands and can offer access to complex financial tools. That makes them look really good to their clients—a great way for you to cultivate agent happiness within your brokerage.

Agents also often become interested in real estate because of the flexibility and independence that the career can offer with it, so it's wise to also consider how much leeway you're giving them to come up with their own solutions and pursue them. If that's something your agents would prefer, then explaining how these ancillary services work and trusting them to make their own decision might be a preferable pathway for your business.



## Chapter 11:

# The icing on the cake: Miscellaneous offerings that make the difference

When the world isn't being hamstrung by a pandemic that's limiting in-person gatherings, one way that West + Main Homes stands out in the crowded Denver market is by offering brokerage networking and events that clients love.

"We do four big client appreciation parties a year," Staub explains. "And we do a lot of in-the-storefront events—first Friday events featuring local artists every month, and pop-up shops featuring makers, creators, crafters."

Since the coronavirus pandemic hit, she says they've pivoted to feature more artists and small-business

owners on the West + Main Homes blog, which they also update regularly with market news, home design trends, and other items of interest to Denver homeowners and aspiring buyers.

Another way that West + Main has changed up their agent services post-COVID is by creating more connection opportunities between and among agents and staff, so everyone feels looped in and, ideally, less isolated. "We used to do so much in-person and in our offices, but we weren't doing any kind of sales meetings before COVID. So when the lockdown first started, right away, we implemented a weekly check-in."

At first, the check-ins were centered around what was happening with the pandemic and how different agents were dealing with it and solving problems for their buyers and sellers. When Staub and Fischer realized they were getting 100% participation and enthusiastic engagement, they wondered how they could use it to better support agents. It's since evolved into a sort of hybrid between educational opportunity and mentorship group, where they'll bring in guest speakers or ask a team member to walk attendees through a different exercise or aspect of the transaction.

Staub might have an appraiser come in and discuss appraisals; she likes using appraisers from out-of-state because she says they can sometimes speak more freely to agents about what exactly goes into an appraisal. She's also booked economists, industry consultants, and others who can give agents a fresh or wise perspective.

"As the year went on, I started feeling like our agents needed more touch than that." So Staub created small team groups comprising a spectrum of seasoned veterans and brand-new agents, who can discuss what they've learned in the educational sessions together and support each other. The groups decide together how often they'll meet and what format makes the most sense for them; some have regular Zoom meetings, while others gather on a patio.

"We find those groups really serve one another," Staub says, "and the seasoned agents really get inspired by the energy of the new agents, and now they lean on them for help and overflow in their business."

The pandemic also threw a wrench in the works at Ansley, but McCormack believes that acting proactively instead of reactively has been key to keeping agents happy and productive.

“One of the things we did as soon as COVID hit was come up with some policies that were protective for the agents, the buyers, and the sellers,” she says.

“We spent time with our agents helping them understand the need for those policies, but we didn’t drill fear into their heads. There’s something with the pandemic that we watched with other companies: If they put fear in the agents, production stopped. But if you embrace the agent, they keep going.”

Ansley implemented company-wide Zoom meetings and used them as opportunities to transparently address anxiety and admit where the leadership team would need to seek more information. They included discussions about mental health and offered resources wherever they could for staff as well as agents.

They also started an “agent expert” series of meetings, where agents could learn from each other.

“Recently, we had one with an agent who does an enormous amount of social media; she is all over everywhere and does tons of video,” McCormack explains. “We take agents who are doing something a little different, put them in front of our other agents, and let them learn from each other.”

Maintaining camaraderie and goodwill across the company wasn't always easy, especially with groups of agents who are used to seeing each other regularly and take a lot of pleasure from spending time with people. Zoom happy hours, as we've all learned, are not the same.

"At Thanksgiving, every agent in the company got a present from us—French toast from a special bakery, with special syrups and a recipe. It was a comfort thing," notes McCormack. Ansley also sent out Jo Malone diffusers for Christmas. "We've really stepped up our game and made sure agents know they are connected."



## Part 2:

# Execution: How are brokers getting these things done?

We've covered some of the services and resources that brokers are offering agents, and touched briefly on how some of those brokers are able to provide them.

But now it's time to get detailed. How do they think about hiring and promotion? What's the deal with forming partnerships with local businesses, for tasks like social media and photography? How do brokers make all of this stuff scale?



## Chapter 1:

# Whom to hire first?

To manage agents and maintain high levels of support to agents, brokerages need to think about staffing, and that usually means finding a handful of people who can provide transaction and marketing help on a full-time basis.

Whether the title is office administrator, transaction manager, operations associate, or some other terminology, this person (or group of people) will be perfectly positioned to keep an eye on which tools your agents are using, which ones they seem to be neglecting, how well those tools execute what they're supposed to do, whether there are any glitches or operating issues, and can possibly even take over managing some of those platforms for your active sales staff.

This person can also keep tabs on the other needs you might have for staffing in the brokerage and help you determine the best ways to fill those needs. Ideally, they'll help you determine what can be automated within your brokerage and how to make that automation happen. When an agent gets a listing, what are all the tasks that need to be completed—and do you have the writers, designers, photographers, web support, and other contract or full-time staff on hand to get the ball rolling immediately?

Consider how an operating coordinator or administrative manager can help you systematize and streamline your brokerage. (This will also ensure you're leverage all of the expensive tools at their highest and best use!)

## Chapter 2:

# Brokers listing homes provide a unique advantage

As the broker-owner, Bonneau Ansley runs a full team and still lists homes. “A lot of companies are like, ‘He’s competing with you,’” to the Ansley agents, laughs McCormack.

She doesn’t give much credence to that argument because she thinks this is part of what sets Ansley apart. “In reality, it’s worked in our favor,” she explains. “Many companies have managing brokers who have not set foot in a buyer’s car or in a listing in ten-plus years. And while they think they can still relate to the agents, there are some differences there. Two of our managing brokers still list and sell. They don’t take leads from the company. But the

agents appreciate that they can see their manager, in real life, going through what they’re dealing with.”

The relatively “flat” leadership structure also helps with promotion and delegation. No one is hung up on titles, says McCormack. It’s not unusual for people to jump in and help with tasks that are technically outside of their areas of expertise.

“We all have a specific hat to wear, but we’re all easily able to wear multiple hats to support each other.”

## Chapter 3:

# Building a flexible do-it-all staff

Everyone on staff full-time at West + Main Homes has been hired from within, says Staub. This is especially useful because they're also licensed agents who have other talents, so they understand all about real estate and also specialize in different areas.

For example, the company's Chief Operating Officer and compliance manager has a background in transaction coordination and restaurant management; Staub describes her as hyper-organized, with a customer service and hospitality mindset. She started at West + Main as an agent, but Staub decided she'd be a perfect fit to handle operations. "Her taking over the contract review was huge for me, and it freed me up to do so many other things. Now she hires for her teams."

West + Main also employs a full in-house creative staff; Staub's business partner is a graphic designer with an agency background who's built that team to create the brokerage marketing materials and knit everything together. "They put together the entire layout of the magazine, do the photo shoots with a local photographer, and we do all the writing in-house. Everything you see that was created for West + Main."

The in-house design staff also helps them turn requests around very quickly, and their level of expertise with the basics means that they can spend some time working on passion projects. “Everything from templated requests, from open house fliers, social graphics for listings, a blog post—those things they can do in their sleep now, so their creative bandwidth is saved for things like the magazine, special requests for agents, events, donation drives, with all the assets they need to really create a beautiful experience.”

## Chapter 4:

# Hiring for a teamerage model

As Smith explains it, the Wemert strategy is to start by contracting out different needs for services; as the needs become more insistent and they learn more about what's required, they work on hiring someone who understands those components and can help them continue contracting out or hiring support staff.

For example, Smith started at Wemert doing graphic design and then stepped into a marketing director role. "Eventually I worked myself out of a job and just kept taking other pieces from the brokerage" until she stepped into the COO role to lead most of the departments.

"I would say the marketing hire is a key hire for a real estate company, and I think it's one that gets skipped

because people feel like they can go do a lot of automated this and get a virtual assistant her and there and piece it all together." That's possible, she allows, but having an in-house hire means that a brokerage can be nimble and can create brand cohesion.

"What worked for us is, we realized we were paying a salary anyway in our expenses," she explains. "So once we reached that point when we were already paying what it would cost us to hire a photographer full-time, then it made sense to try to hire one so we could stabilize the availability, and so we could customize our look and feel and gain some consistency."

It's important to keep good relationships flowing with those companies that provide you with the contract support, in her opinion. "We knew we'd still need them" for overflow help, and they continued to supplement with their contract help until they were ready to hire a second photographer because the expenses stretched to accommodate two salaries.

"The key there was finding someone teachable enough to come in," she notes, who's adaptable enough to blend their style with what Wemert is seeking in their marketing materials.

## Chapter 5:

# Lean on me: Getting strategic with partnerships

At Middleburg Real Estate | Atoka Properties, Showalter says that “everything has been built off the framework of what makes sense and not what is standard in real estate.” Per Adkins’ point about hiring people from outside of real estate, Blake started her career in fitness and had no experience in the industry when she started, “but I’m just the kind of person where I see a problem and go find a solution.”

For the brokerage, that has meant hiring some full-time staff members in certain positions, and then using strategic partnerships to help fill in the gaps. When hiring, Showalter says that they try to get very

specific and detailed with job descriptions outlining the basic details and duties of the gig, and then they can hire with a narrow focus on the position’s needs.

“Our creative director started in more of an admin marketing assistant role, and we realized she was great at the creative marketing side of things,” Showalter explains. “So when we hire the

next person, we'll ask our creative director, what does she not like to do? Let's try to make that part of a different role. And what does she enjoy doing? That's what we want her to be doing."


Showalter also seeks out strategic partnerships to help support the in-house staff they've got. She uses a branding strategy and content creation project that they put together and attempted to execute in-house. "We tried to handle it in-house, and we had a staff, but it wasn't going to work out," Showalter explains. "But at that point, our agents had bought into it."

So she scrambled to fulfill what they'd promised their agents and were able to find a local company that could execute on all of those services. "It was a win for everyone because we want to support local business, and for our agents to have a really high-touch experience, and it makes sense financially, and it will allow us to scale."

This even drills down into service provider partnerships, such as website providers. Middleburg Real Estate | Atoka Properties has created an agent template on its website platform, using approved branding and typefaces, so that agents can instantly (literally!) create a website that's customizable to them and their preferences, but also falls strongly within the brokerage brand guidelines and spectrum.

Placester's concierge services also allow agents to request even more from their website without having to find a developer or designer experienced with IDX to help them with it. Agents can submit requests for design, writing, or engineering tweaks to their websites, and the effort that goes into finding creative support and solutions to implement those changes is taken on by the concierge. Like magic, the changes are made. It takes the pain out of hiring for at least one critical part of real estate services.





Middleburg Real Estate | Atoka Properties has also created strategic partnerships for photography and videography, marketing assets, transaction management, and collaborations with title companies and lenders. Showalter surveys agents quarterly about their experiences with the different service providers so she can ensure that agents are happy with what they're getting from their brokerage.

## Chapter 6:

# Scaling walls: Craft the solution that works best for you

Adkins, who works with a range of different brokerages trying to solve this problem, suggests that perhaps a one-size-fits-every-agent isn't always the best solution. So the first question is, what's your path forward, and how do you want to think about your offerings?

"I'm a deep believer in a traditional brokerage model if the agent gets more than just a company sign and 'We'll enter your listings for you.' I don't need you to get a big chunk of my commission for that. But give me really professional advice on my business, and how I can adopt these tools and grow.

"That should start in recruiting and carry through after they sign up. And I know that's easier said and done for brokers, but is your goal to have 25 amazing agents? Or 100 agents, with 25 who are producing?"

And when scaling, "eliminating agent choice is definitely key," he adds. Brokers need to determine what they're providing, marketing-wise—content, social media, emails, postcards, all or some or none of those things?

Maybe you can find one vendor that can do all of those things, ideally—or they do some of those

things and offer add-on solutions for others, or simply say they can't provide a full spread of services. "But it's got to be scalable; they have to provide consistency," Adkins notes.

He also says that hiring people from outside the real estate industry to help with staffing and management solutions can be one of the best things a brokerage can do for itself. They're willing to ask "why are you doing things that way?" instead of following the same tired path, and it's possible their suggestion will be game-changing.

## **We hope you enjoyed this Boutique Broker's Guide to Delighting Agents.**

Do you want to delight more agents?

Learn how Placester can help.

- Gorgeous designs that agents can use to customize websites, within brokerage brand-specific guardrails to keep the look and operation of your site consistent.
- We offer a fair billing policy because we believe you should only pay for agents that actually launch their website.
- Robust agent management tools with super admin control, so you can edit every site, control who gets access and accelerate your agent support.
- Access to professional writers, designers, and engineers who can quickly and effectively tweak your website without you needing to seek outside assistance.

- And for those brokerages who are already committed to marketing but need a sixth gear to get more done, engage our Concierge Custom team for dedicated website marketing help and custom marketing workflows.

Learn more about how Placester can help support your boutique brokerage ambitions. [Book a Call.](#)