



ALAN & BETSY THOMPSON

Database

110% Community Focused

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Database

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Lucky Realty

Chesapeake, VA

alan@luckyteam.com

betsy@luckyteam.com

 luckyhomerealtors

Years in real estate: 22

2021 Results

- ❖ Transactions: 129
- ❖ Volume: \$52,100,000
- ❖ GCI: \$1,610,000

2022 Jan to July (C&P)

- ❖ Transactions: 85
- ❖ Pending Transactions: 22
- ❖ Volume: \$40,784,073
- ❖ Pending Volume: \$7,749,575
- ❖ GCI: \$1,268,888
- ❖ Pending GCI: \$234,037



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By the **NUMBERS**

Database size:	1,100
Percentage of business from database + referrals:	92%
Referrals closed in 2021:	79
2021 total database GCI:	\$1,481,200
Yearly touch points with each client:	40
2021 gifts, events, salaries for database and referrals experience:	\$98,680
Rate of return on database and referrals:	14X

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Why DATABASE?

You really can build your business from the ground up by reconnecting with old friends. And your database really can be your only lead source when friends and clients become your raving fans.



“The Playbook”
Alan & Betsy’s
APPROACH

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BACKGROUND

Betsy has sold homes for seven years and Alan has been in the industry for over thirty-four. They were living in Florida and all but retired when they decided to go back into business. But this time it would be in Betsy's home town of Chesapeake. The goal: A business based 100% on past clients and referrals. So Betsy started reconnecting with people she knew from high school. Even before they left Florida, they had an extensive network of people ready to do business when they arrived. Betsy's success proves that reaching out to those you know really can be the beginning of a flourishing business.

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PHILOSOPHY

Alan and Betsy know who they are and the rules they play by:

- Never pay for a lead. Everything is to be completely community-oriented and focused on delivering value.
- Teach your clients to give you referrals. Betsy tells every one of her clients that she doesn't spend her time making cold calls and that they are her only source for new business. And she makes a promise: "I'm going to make you so happy that you're going to be excited to bring me new business."



PHILOSOPHY

- Function as more than a transaction facilitator. Alan and Betsy are the complete resource for everything real estate. They check in on their clients, and their clients can contact them any time if something is wrong with the house.
- Be a patriot. Alan and Betsy are proud supporters of the U.S. military, the demographic they primarily serve.



Reconnecting to **BUILD YOUR SPHERE**

How did Betsy establish a sphere eager to do business even while she was hundreds of miles away? She just picked up the phone and had real conversations with people she knew. To this day, she never brings up real estate on the first call herself. "If you ask people about themselves, they'll ask about you, and that's a time to bring it up."

What Betsy understands is that you have to truly be interested in others and their lives. "If you really care then they'll really care. You can't fake it."



Marketing **PLAN**

Alan and Betsy only spend money on people who are in their database, and they don't add anyone to their database who they don't know. With a clearly defined database, they can focus on those they care for - who are also the ones who will refer and do repeat business. Their marketing plan is truly remarkable.

- 4 client events each year. For one of them, they rent out the local brewery for a party with upwards of 500 clients and hold a raffle. The raffle prize: Alan and Betsy pay the winner's next mortgage installment!
- 3 American flags delivered to the mailboxes around their community on patriotic holidays.



Marketing **PLAN**

- 3 yearly pop-by deliveries from local vendors. For example, a chef made a local spice, so Alan and Betsy bought 300 jars of it and delivered them to their top 300 clients.
- 500 birthday cakes delivered to their top 500 clients.
- Personal responses to Facebook posts. Commenting on posts isn't enough. Betsy calls people based on what she's seen on Facebook. If she sees someone has had a baby, they have baby blankets on hand which they then have embroidered with the baby's name and weight. Delivery time? 24 hours.



Marketing **PLAN**

- Direct mail. No Christmas card, because those always get lost. Instead, they send a year-in-review in January. One side tells about their business and the other side tells about their family.
- A 5-minute long podcast, "The DropZone," during which Alan responds to frequently asked questions.



Database **SEGMENTS**

- A+ (28): These are super referrers. From these 28 people, Alan and Betsy have received close to 150 referrals.
- A (500+): These are the people who get the cakes. There are two basic criteria that must be met:
 - They need to be past clients
 - They know how to refer and do so
- B: They might refer, but are not comfortable doing so and may need an extra nudge.
- C: People they know, but they need to educate them on how they do business and train them to refer.
- D: Vendors and local agents



TEAM

- An ops manager who handles all paperwork and takes listings to close.
- A client concierge who coordinates estimates related to getting the home ready for listing. She also takes care of clients for life, referring them to vendors for whatever they need.
- A videographer who films Alan's podcast, testimonials and listing videos.
- A listing coordinator who goes on appointments with Betsy and takes notes, then works with the ops manager.



TEAM

- An executive assistant who works 50% for the business and 50% for Alan and Betsy personally. She drives their daughter to school, buys groceries, handles receipts, drives deliveries and all the tasks that keep Alan and Betsy from doing what they do best.



LOOKING AHEAD

Alan and Betsy have just hired two new showing agents who are salaried W-2 employees. They are locals who went to Betsy's high school, and the intent is to use them to engage a younger database.

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“The Playbook”
Alan & Betsy’s
TOOLKIT

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Alan & Betsy's TOOLKIT



THE Thompson FAMILY

2021 Year in REVIEW

Many have had a difficult year this year with illness, loss, uncertain employment, and isolation due to continued COVID-19. We know this past year has been full of challenges, and we hope that the coming year brings more certain times for your family. We are sending all our good wishes for better days ahead.

So, as we look at each new year as a book with 365 blank pages. Let's hope we write a new best seller in 2022!



We traveled to Orlando, Dallas, and Nashville on business, and got a little down time in each one. We travelled with Bri and friends to the mountains outside Asheville and to Puerto Rico!

Betsy and I did get to go on our December trip to Antigua! Our end of year recoup, recover, and rest trip to get ready for 2022!



We are excited for planned travel in 2022 to Las Vegas, Jamaica, Colorado, California, and 1 more warm tropical place!

Our 4-legged family had a good year. **Lucky** did have a back injury from jumping too much but he quickly recovered. **Maverick** is still crazy and guarding the backyard, and **Karma** is enjoying her private space in the back of Betsy's closet!



CELEBRATED!



Alan	59	Lucky	8
Betsy	4?	Karma	5
Brianna	15	Maverick	2

Lucky Homes 3



Look out world, Brianna got her permit and will be on the roads soon with her Honda Accord she got for Christmas and Birthday.

Brianna made the **Cape Henry Collegiate Tennis team**. She also finished the 1st Semester of her Sophomore year with **straight A's!**



Alan got a new bike to ride and has even registered for a race in 2022. The answer for how many bikes do you need is always $X = N + 1$

Betsy went on a girls trip to Destin, FL with some longtime friends. They made it back alive and I didn't get called for bail money! They also did a girls trip to the Outer Banks and as far as I know the house is still there.



Betsy said she was going to run more in 2022... Alan asked who was going to be chasing her?

Alan & Betsy's TOOLKIT



Lucky Realty

We all started 2021 looking for a year better than 2020. For some of us, 2021 was a record year. We know that many still suffered in 2021 due to COVID-19 issues and something new, staffing issues! Whether you were a business owner, trying to hire staff, or an employee working extra hard because of staffing shortages, we salute and admire you for working hard and pushing thru it! We were fortunate to have a great year in real estate sales, although it was absolutely one of the most stressful years ever. When there are 5+ buyers for every home, competitive offers all the way around, and stressful timelines to try and get buyers a place to live, believe me, we are feeling the stress and worked more hours this year than we ever have trying to make it work for our clients.

Betsy was voted COVA Magazine BEST AGENT in Coastal Virginia! And **Lucky**

Realty was voted the Top Real Estate Company in Coastal Virginia! **Alan** was elected to the Hampton Roads REALTORS Assoc. Executive Committee. **Betsy** is also on the local **YMCA Board of Directors**.

We won the **Diamond Award For Small Teams** at the REALTOR® Circle of Excellence Awards which is the highest level given!



Lucky Is Local! We work hard to support our local community, Great Bridge, Chesapeake, and Coastal Virginia. We did our first quarterly local gift with **MADD Seasoning** and it was a huge success. We also delivered Birthday Cakes from **Bizzy Bees Baking** and **Tracy's Treats** made 260 pies for our Thanksgiving Pie event. We are proud of our to live in American and to support our local active duty and Military veterans with over 2,000 flags delivered!



We were able to hold 4 major events, our Strawberry Patch, Pumpkin Patch, Thanksgiving Pie Pickup, and our first Get Lucky event at Big Ugly Brewery! We have a great new event in the planning stages for 2022 so look out!



Our Team grew this year! **Keren, Lisa** and **Sierra** joined the team with **Amanda** and **Vikki**. Keren is our marketing manager, developing all our great content. Lisa is a Buyer Sales Associate insuring our buyers get the best service every day, and Sierra is our personal assistant and family manager. The entire team is here to bring luxury concierge service to every transaction and we couldn't do it without them.

Alan told Betsy "Cooking is easy."

Betsy said "It's not easier than not cooking!"

2021 Year in REVIEW

CELEBRATED!

We sent out over 600 Lottery Birthday Cards and delivered 194 Birthday Cakes! Make sure we have your birthday on our list because this year we are going to be doing even more birthday surprises!



Betsy and Alan continued to network and teach other agents around the country on real estate topics and on working together as a couple!

Alan & Betsy's TOOLKIT



Lucky Realty - 2022 Marketing Plan (Page 1 of 2)

January	Recipients	Theme/Piece	Format	Start Date	Completed	Est Cost	# Contacts	Goal	Results
	Database	Update	Email	1/15		\$50	1500	10% Open	
	PC,A+/A/B	Year Review	Mail - Letter	1/1		\$750	500	Connect	
	Bday Cards	Happy Bday	Mail - Card	1/1		\$75	50	10% callback	
	SOI/Geo Farm	Year Projections	Postcard	1/1		\$2,000	2000	Branding	
	Lucky Ladies Club		Event	1/1		\$300	20	Local Social	
	Bday Cakes	Happy Bday	Cakes	1/1		\$600	20	WOW!	
	SOI/Geo Farm	Investing in RE	Postcard	1/15		\$2,000	2000	Branding	
	VIP PopBy/CG	Ice Scrapers	Delivery	1/15		\$4,000	500	Branding	
						Expense	\$9,775		

February	Recipients	Theme/Piece	Format	Start Date	Completed	Est Cost	# Contacts	Goal	Results
	Database	Update	Email	2/15		\$50	1500	10% Open	
	Bday Cards	Happy Bday	Mail - Card	2/1		\$75	50	10% callback	
	SOI/Geo Farm	First Home Story	Postcard	2/1		\$2,000	2000	Branding	
	Lucky Ladies Club		Event	2/1		\$300	20	Local Social	
	Bday Cakes	Happy Bday	Cakes	2/1		\$600	20	WOW!	
	SOI/Geo Farm	What Price to Sell?	Postcard	2/15		\$2,000	2000	Branding	
	VIP Pop By - Local	Local Item	Delivery	2/15		\$7,000	300	Local WOW!	
						Expense	\$12,025		

March	Recipients	Theme/Piece	Format	Start Date	Completed	Est Cost	# Contacts	Goal	Results
	Database	Update	Email	3/1		\$50	1500	10% Open	
	Bday Cards	Happy Bday	Mail - Card	3/1		\$75	50	10% callback	
	PC/Referrer	St. Pats Invite	Card	3/1		\$500	250	100 RSVP	
	Lucky Ladies Club		Event	3/1		\$300	20	Local Social	
	SOI/Geo Farm	Curb Appeal	Postcard	3/1		\$2,000	2000	Branding	
	Bday Cakes	Happy Bday	Cakes	3/1		\$600	20	WOW!	
	PC/Referrer	St. Pats Invite	Event	3/1	17-Mar	\$7,000	300	100 Attend	
	SOI/Geo Farm	Sell a Home Every X days	Postcard	3/15		\$2,000	2000	Branding	
						Expense	\$12,525		

April	Recipients	Theme/Piece	Format	Start Date	Completed	Est Cost	# Contacts	Goal	Results
	Database	Update	Email	4/15		\$50	1500	10% Open	
	PC/A+/A GB	Easter - Peeps	Pop-By	4/1		\$2,500	500	Connect	
	Bday Cards	Happy Bday	Mail - Card	4/1		\$75	50	10% callback	
	Lucky Ladies Club		Event	4/1		\$300	20	Local Social	
	SOI/Geo Farm	Area Resources	Postcard	4/1		\$2,000	2000	Branding	
	Bday Cakes	Happy Bday	Cakes	4/1		\$600	20	WOW!	
	SOI/Geo Farm	Money Saving	Postcard	4/15		\$2,000	2000	Branding	
						Expense	\$7,525		

May	Recipients	Theme/Piece	Format	Start Date	Completed	Est Cost	# Contacts	Goal	Results
	Database	Update	Email	5/15		\$50	1500	10% Open	
	Bday Cards	Happy Bday	Mail - Card	5/1		\$60	60	10% callback	
	SOI/Geo Farm	Area Resources	Postcard	4/1		\$2,000	2000	Branding	
	SOI	Strawberry Invite	Postcard	5/1		\$500	500	300 RSVP	
	Lucky Ladies Club		Event	5/1		\$300	20	Local Social	
	Bday Cakes	Happy Bday	Cakes	5/1		\$600	20	WOW!	
	PC/A+/A GB	Strawberry Patch	Event	5/9	May 9	\$7,500	600	250 Attend	
	SOI/Geo Farm	Flag Delivery	Pop-By	5/20		\$5,000	2000	Branding	
	VIP PopBy/CG	Local Item	Delivery	5/1		\$7,000	500	Branding	
						Expense	\$23,010		

June	Recipients	Theme/Piece	Format	Start Date	Completed	Est Cost	# Contacts	Goal	Results
	Database	Update	Email	6/15		\$50	1500	10% Open	
	Bday Cards	Happy Bday	Mail - Card	6/1		\$75	50	10% callback	
	SOI/Geo Farm	Invite - Sno Cone	Postcard	6/1		\$2,000	2000	Branding	
	Lucky Ladies Club		Event	6/1		\$300	20	Local Social	
	Bday Cakes	Happy Bday	Cakes	6/1		\$600	20	WOW!	
	Neighborhood Event	Sno Cone	Event	6/15		\$3,000	3000	200 Attend	
	SOI/Geo Farm	Home Improve	Postcard	6/15		\$2,000	2000	Branding	
						Expense	\$8,025		

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3 Things YOU CAN DO NOW

01

No matter where you are, pick up the phone and start reconnecting. Reach out on Facebook and start having real conversations.

02

Whenever you get a client, teach them how to refer you. Always show gratitude and remind people how much their support means to you.

03

Go all out on client care. Invest money in events and gifts. And most of all, be personal, authentic, and caring.

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6 Things Alan & Betsy will do **MOVING FORWARD**

01 Implement an automated home equity evaluation tool for database clients.

02 Add one other late summer client event for next year.

03 Adopt buyers of our listings into our Lucky VIP programs for events and pop-bys.

04 Develop a strategic out of the area agent referral program with marketing.

05 Perform full database evaluation for sphere and client rankings two times per year.

06 Work with my Tom Ferry coach to help keep me accountable and to help me implement these ideas!

ALAN & BETSY **ON COACHING**

We've been doing this a long time at very high levels, and we still need somebody to bounce ideas off of and poke holes in what we're thinking. Someone who can help us in where we're going, somebody that we respect and we will listen to. Our coach makes us better because he brings us ideas that other top people are doing. Some of our best friends are Tom Ferry coaching clients. I mean it's unreal.

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