


THE ULTIMATE REAL ESTATE PLAYBOOK: SYSTEMS THAT WORK

Organize & Operationalize: \$2M GCI in 1 Year

Systems & Checklists for Managing 200 Transactions

LOURDES
MAESTRES

 COMPASS

 @lourdesmaestres



AT A GLANCE

Imagine increasing your annual sales by 30% without having to add a new lead pillar to your business but by creating the perfect S.O.P. to maximize your current business and never lose a client again. Whether you are a solo agent that wants to build consistency or you want to build a team- you can never do it right unless you have S.O.P.s that match your goals.



**Fort Lauderdale,
Florida**

PRIMARY MARKET



\$597k

AVERAGE PRICE POINT



15

YEARS IN REAL ESTATE

2023 PRODUCTION STATS

199

TRANSACTIONS

\$87,197,924

SALES VOLUME

\$2,025,066

GCI

TOP LEAD SOURCES

- ✓ Online Leads - 52%
- ✓ Sphere - 21%
- ✓ Past Clients - 12%

PRODUCTION

70% | 30%
Buyers | Sellers

TEAM STRUCTURE

- ✓ 12 agents
- ✓ 8 staff members

Lourdes ON COACHING



Throughout my real estate career, I have always valued coaching, but joining Tom Ferry's team coaching in 2019 was life-changing. As a solo agent, I felt like I was winging it and didn't have a "real" business. **My coach and the support of this ecosystem helped me build a solid business foundation and implement essential systems.** My coaches provided invaluable guidance in refining my strategies and growing my team. **With their help, I've achieved remarkable success, generating \$2.5M-\$3.3M in gross commission income annually, improving my quality of life, and fostering a network of supportive, like-minded professionals.** The resources and collaborative spirit within the Tom Ferry ecosystem are unparalleled. There is absolutely no comparison—no broker or other company offers what the Tom Ferry organization does.



BY THE NUMBERS

97

Individual S.O.P.s recorded in operations manual

50%

Increase in overall efficiency due to systems

\$6M+

GCI produced through systems in 4 years (2024)





THE STORY

Lourdes was burnt out. She had been pulling 14-hour days and juggling all aspects of her business alone. And there came a point when it became unsustainable. She joined coaching as part of a plan to embrace the power of systems within a real estate team. "I did the one thing thousands of people that sign up for coaching say they want to do," she states. "I created standard operating procedures for every aspect of my business."

Lourdes learned a crucial lesson: people don't love systems, but they love the results they produce. Her streamlined processes eliminated stressors and inefficiencies, freeing her up to focus on scaling her business. "Working on the business instead of being stuck in it," became her mantra. This shift in focus has led to quadrupled growth in her business.

By systemizing every component—lead management, client follow-ups, transaction tracking, and marketing—Lourdes positioned herself not just as a business owner but as a visionary leader. Her operations run so smoothly that her team can close 200 transactions a year, a remarkable achievement compared to the 40 she managed on average before.

And, best of all, because operating procedures are so clear and effective, the office keeps moving forward and growing, even if Lourdes doesn't come in every day. She often reflects on the importance of preparing for the level of production you actually want. "Are you ready to handle the level of production you aim for?" she asks. **Her journey demonstrates that systems are not just a tool but a vehicle for exponential growth.** Her story is a testament to the power of strategic planning and disciplined execution. With a well-defined system, Lourdes has become an inspirational figure in the real estate community, proving that the right procedures can lead to extraordinary success.



THE STRATEGY

SUSTAINABLE SCALING WITH SYSTEMS

From lead management to transaction tracking, every activity is documented and optimized, leading to remarkable scalability. To scale your real estate business effectively, systems are your best ally.

- Lourdes has an S.O.P. and checklist for everything in her business.
- Everything is stored with google suite.
- Her VA and admin staff have a detailed and organized written process for every activity and process in the business.

BUSINESS TRACKING

Tracking operational metrics is crucial. Lourdes' team now handles 200 transactions annually, an impressive leap from the 40 she managed solo. Such exponential growth is the result of meticulous tracking and data-driven decision-making.

- She has Monday accountability meetings at 8am to review progress towards goals, wins, challenges and set the new goal for the week.
- Each agent reports their numbers DAILY through Slack automations.
- Agents report on their performance and activities such as: how many new customers met, existing customers met, listing appointments completed, buyer consultation completed, buyers agreements signed, 1-time showing agreements signed, referrals received, offers written and total number of showings for the day.
- All agents are held accountable with a fully automated system. The VA will cross reference the agent's daily reports and identify any missing information, then update the daily scorecard and weekly report.
- Lourdes has an executive meeting every Monday to go over numbers and identify problems.
- Agents receive a regular cadence of one-on-one's, including monthly reports with a summary of their income producing activities, conversion rate and results to drive accountability.



THE STRATEGY

OPERATIONAL PROCESSES

By documenting processes and automating repetitive tasks, Lourdes transformed her business into a stress-free, efficient powerhouse. This shift not only improved operational efficiency but also enhanced client satisfaction and team morale. High priority processes include, but are not limited to:

Lead Management Process

- The S.O.P. outlines every step of the process. Including who is responsible for what. The sequences of the contact points.
- The systems and statuses that must be changed to advance the process.
- An accountability system that agents must follow to handle the lead

Listing Launch System

- Each step of the listing process is documented. There are 12 steps from social to MLS to landing pages
- The launch system starts with step one being in the pre-listing phase and step 12 occurring after the listing has gone live.

Lourdes' 3 Action Items

FOR SUCCESS

1

Do a SWOT analysis of your business to identify the most critical S.O.P.s that should be implemented first.

2

Focus on team autonomy and trust when scaling your business.

3

Update and iterate all of your systems and processes, including responsibilities, and establish an annual review process for them.

6 Things Lourdes Will Do

MOVING FORWARD

1

Continue to focus on her team autonomy with each department owning 1-2 projects max per quarter.

2

Regularly update all processes and procedures to ensure these systems evolve to meet new challenges.

3

Deepen her commitment to disciplined execution and continuous improvement.

4

Conduct focused analysis of all social channels and other marketing metrics as a basis for process revisions.

5

Find more opportunities for growth through efficiency and planning.

6

Work with her Tom Ferry coach to help keep her accountable and to help her implement these ideas!

Lourdes' TOOLKIT



Buyer Lead Management Process

An overview of Lourdes' Buyer Lead Management S.O.P. and 8-step process.

Business Activity Tracking System

A Google Sheet template of Lourdes' business activity and agent tracking system.

Listing Launch System

A full overview of Lourdes' listing launch process and step-by-step summary.

BUYER LEAD MANAGEMENT PROCESS

STEP 1 - INCOMING ONLINE BUYER

- Agent must verify contact information (full customers name)
- Incoming lead is automatically added to the CRM
- Log the call and add notes
- Set appointment on CINC, sync Google Calendar (immediately)
- Zillow leads - auto text- all new leads - regardless of stage
- Automated Label "HOT "
- This will trigger the below text message:

*This is [AGENT FIRSTNAME], your Zillow Premier Agent. As discussed, I will be sending you an email outlining the next steps. In the meantime, if you have any questions, please feel free to contact me directly at the number below.
Phone Number: [AGENT CELLPHONE]
Email: [AGENT EMAIL]*

STEP 2 - APPOINTMENT SET

- Automatic email including a blank copy of the 1 time showing agreement
- Change status to " appointment set", this will trigger below email:

Hi [FIRSTNAME],

I'm excited to work with you! Before we begin touring homes, please review and sign the Showing Agreement you will receive from Dotloop for e-signature.

A written agreement is required by law for us to tour homes. If you prefer to sign this form in person we can meet prior to the showing at my office located at ADDRESS

*Here's the form for your reference: [First Time Showing Agreement](#)
Also, I've included a digital "[Home Buying: Step-by-Step Guide](#)" with valuable information about the home-buying process.*

If you need further explanation or wish to discuss, please contact me on my personal cell phone at [AGENT CELLPHONE].

STEP 3- DOTLOOP E-SIGNATURES

- Non exclusive - One Time Showing Agreement
- Sent via Dotloop - mobile app - e-signatures - Agent's responsibility
- Agent to confirm it is signed prior to the appointment

STEP 4 - APPOINTMENT MET

- Agent must schedule the buyer consultation at the end of the showing
- Add buyer consultation label for automation
- Set appointment on CINC, title "consultation" sync Google Calendar (immediately)

STEP 5 - BUYER'S CONSULTATION

- Apply "buyer consultation label" for automatic email to be sent out with the buyer's booklet (MPH BRANDED).
- ASK : BUYER CONSULTATION QUESTIONS
- EBBA (Exclusive buyer's agreement-Compass) to be signed at buyer consultation. Mandatory.
- Appt for showing homes must be set and change status to active client and "showing homes" in Zillow.
- Find CINC template as: B- Buyer Consultation - buyer flip-book.
- Hard copy of Buyer's Book to be delivered in person by agent (Customized with agent info).

Hi [FIRSTNAME],

It was great connecting with you!

To help you prepare for our meeting, I've included a digital "Home Buying: Step-by-Step Guide" with valuable information about the home-buying process.

Here's a summary of the steps we'll follow:

- *Initial Consultation: Discuss your needs, preferences, and budget.*
- *Pre-Approval: Get pre-approved for a mortgage to determine your buying power.*
- *Home Search: Start touring homes that match your criteria.*
- *Making an Offer: Submit an offer and negotiate terms.*

continued...

- *Inspection & Appraisal: Schedule a home inspection and appraisal.*
- *Finalizing the Loan: Complete the mortgage process with your lender.*
- *Insurance: Obtain homeowners insurance to protect your investment.*
- *Closing: Review and sign all closing documents.*
- *Move-In: Receive the keys and move into your new home!*

This guide will help you navigate each stage of the home buying process smoothly. For more details, feel free to reach out at [AGENT CELLPHONE].

Looking forward to our consultation!

*Best Regards,
[AGENT FIRSTNAME]*

STEP 6- CLIENT CARE - TC

- Call after "24 hours of appt met"
- Satisfied customer - Script
- Unsatisfied customer - transfer process -ISA rules apply when selecting an another agent

STEP 7 - ACTIVE - SHOWING HOMES - BUT NOT BUYING

- Send the weekly CRM template - "Don't Fire Me Report for Buyers" (must send weekly, bi-weekly or monthly via CRM)

STEP 8 - NURTURING PLAN

- Add Nurture label - automated (13 texts & emails) over the course of 365 days CINC.

LISTING LAUNCH S.O.P.

Step 1

- Agent creates a pre-listing video with the following questions:
 - Where is the property?
 - First name of the owner?
 - How much do they want?
 - CTA - "If you want to be added to my VIP list, send me a DM"

Step 2

- Marketing edit it: showing 1-mile radius map and include a poll yes/no as a story in Instagram.

Step 3

- It is shared in Reel and TikTok - add the agent as collaborator.

Step 4

- Our marketing coordinator consolidates the VIP list, collects contact from the team and agent's Instagram and send to the VAs to be added to the CRM.

Step 5

- Our ISA will call the VIP list and/or will make at least 200 calls to circle prospect around the listing's area.

Step 6

- Coming soon strategy consists on one of our VAs searching the property match for the property from CINC - Properties and then sending a notification to the agent assigned.
- Our VA sends the email template with the landing page and listing link to all the contacts on the VIP list.

Step 7

- Once the listing is active, our marketing coordinator creates a 30 seconds video only with the listing photos. For listing \$1M and up, we create the long form 1-2 minute videos We share the video in all platforms (youtube, instagram, fb and google my business as a product).

Step 8

- We will host 24-hour open houses for vacant properties and 12-hour open houses for occupied properties. We need to host at least 1 open house per week for new listings Neighborhood open house will be optional.
- It is mandatory to submit your open house request by completing the request form.
- The agents will take turns to host these open houses.
- The flyers for the OH will be available with the property landing page and listing link.
- When an agent requests to door knock for a listing, they will receive flyers with their own personal home estimate QR code, so all leads will go directly to them in the CRM.

Step 9

- The listing agent will record a video following the next questions:
 - How we met
 - When did they buy the home
 - What renovations were done recently
 - Marketing strategy
 - Offer activity & Negotiations
 - Successful closing

Step 10

- Our marketing coordinator will edit the video from step 9 and will update our initial landing page with it Then, a QR code will be generated with the YouTube link no public.

Step 11

- Our agents will door knock with flyers created with the closing story and the QR code with the YouTube link option to include their home estimate personal QR code also available.

Step 12

- 200 postcards to be sent around the listing neighborhood for 4 consecutive weeks.
- After that, we make the YouTube video public.

BUSINESS ACTIVITY TRACKING WORKSHEET

Agent Tracking Workbook - Lourdes Maestres - Systems that Work .XLSX

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	A	B	C	D	E
1		RECAP	%	GOAL	%
2	BUYERS				
3	LISTINGS 20%				
4	LISTINGS - TEAM LEADER				
5	TOTAL				
6					
7	TENANTS				
8	LANDLORDS				
9	TOTAL RENTALS				
10					
11	Agent referral sent				
12	Agent referral recieved				
13					
14	BUYERS VOLUME				
15	LISTING VOLUME				
16	LISTING VOLUME - TEAM LEADER				
17	TOTAL VOLUME				
18					
19	BUYERS AVERAGE PRICE				
20	LISTING AVERAGE PRICE				
21	LISTING AVERAGE PRICE- TEAM LEADER				
22	TOTAL AVERAGES				
23					
24	BUYERS AVERAGE %				
25	LISTING AVERAGE %				
26	TOTAL AVERAGE %				
27					
28	BUYERS GCI				
29	LISTING GCI				
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