

Online Summit – Spring 2013

It's Not What You Make,

It's What You Keep!

How to Get and Stay Profitable

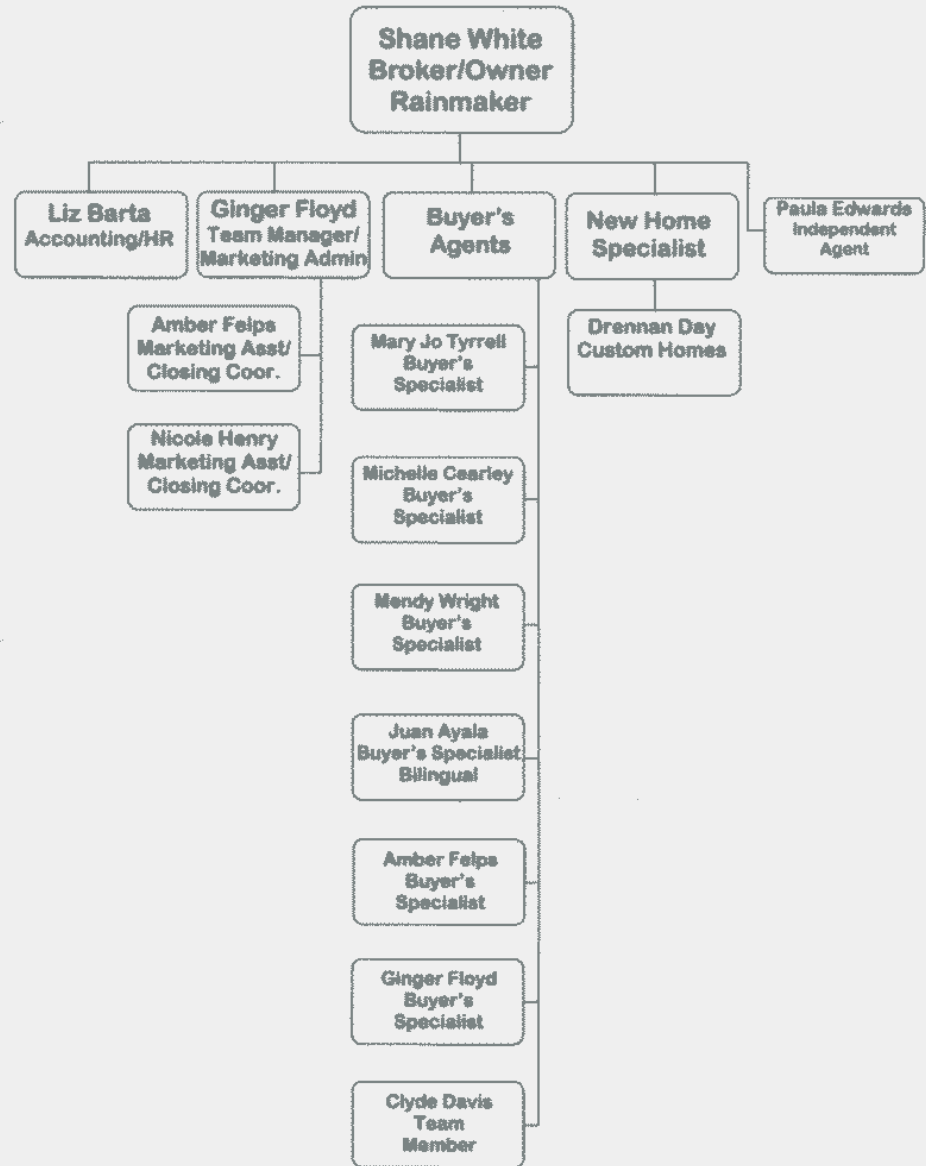
Shane T. White, CRS

Broker/Owner – RE/MAX Town & Country

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Flow Chart of Organization



Mission Statement and Core Values

Mission Statement: Our mission is to provide the highest level of customer service by incorporating knowledge, integrity, professionalism, and commitment. Our team is dedicated to exceeding our client's expectations.

Core Values: Excellence is our minimum standard. Absolute honesty and integrity. Live the "Platinum Rule"...treat others the way they want to be treated. Education and self improvement is vital to our success. There is no "I" in TEAM.

Executive Summary

RE/MAX Town & Country and The Shane T. White Team are currently in an expansion phase. 2007 was an "OK" year in terms of business and the current status of the real estate market. The 2008 Goal of 39 Million in sales is a 6.5% increase over 2007's closed business and the increase to 225 sides is an 8% increase over 2007. We feel with the current state of the real estate market and the buyer's hesitance to make decisions to buy, these goals will be challenging to achieve. Our goal this year is to implement better systems, especially on the listing side. We have set ideas to implement from our retreat this year, and will focus on one idea each meeting until they are all implemented. We will need to add a dedicated agent to help with Drennan Day's business and to cover the lot sales for the new development Rio Ancho Ranch.

The Shane T. White Team's objective is to give our clients unwavering service and negotiate the best possible purchase contract with the greatest likelihood of closing escrow and closing on time.

RE/MAX Town & Country may also look to add additional "independent" agents to the company that will perform outside the realm of the "Team". Paula Edwards moved to an independent agent in 2007.

RE/MAX Town & Country operates as a Sub Chapter S organization. Its key management is as follows:

Shane T. White	CEO/Listing Specialist/Team Leader 8 years in the business Diamond Club from RE/MAX
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2008 Goals

Sales: 39 Million
Units: 225 Sides
Gross Commission: \$1,170,000
Average Sales Price: \$175,000

Quest:
Perfect real estate transaction.

Values:
Family, Fun, Respect, Profit

Strategies:
*Team Approach
Customer for Life
Unquestionable Integrity
Team Development*

Executive Summary

- ▣ “State of the Market”
- ▣ Ambitions for the Business for the Next Year
- ▣ Define the Type of Organization – Sole Proprietorship, S Corp, C Corp
- ▣ Key Management and Experience
- ▣ Support Teams
- ▣ Current Market Conditions

Goals

- ▣ Sales Volume
- ▣ Net Income
- ▣ Average Price
- ▣ Strategies
- ▣ Company size/growth

Management and Organization

Chairman's Club from RE/MAX
Lifetime Achievement from RE/MAX
Hall of Fame from RE/MAX
Consistently ranked among the top Austin RE/MAX Teams

Paige White	Owner/Advisor 6 ½ years in the business
Clyde A. Davis	Team member/Advisor 27 years in the business Hall of Fame from RE/MAX
Liz Barta	Accounting/HR Financial operations
Ginger Floyd	Team Manager/Marketing Administrator 9 years in the business Licensed Assistant
Amber Felps	Closing Coordinator/Marketing Assistant Licensed Assistant/ Buyer's Specialist
Nicole Henry	Closing Coordinator/Assistant
Juan Ayala	Buyer's Specialist
Michelle Cearley	Buyer's Specialist
Mary Jo Tyrrell	Buyer's Specialist
Mendy Wright	Buyer's Specialist

Support Teams:

Bill Caton – CPA

Michael Dion – Computer/Technology

Current market conditions for the Liberty Hill area shows a normal market with normal/growing inventory. Range of professionals from independent agents to companies. RE/MAX controls 27% of the residential market. RE/MAX, Keller Williams, Shin Oak Realty, Century 21, City Real Estate & Mortgage, and Coldwell Banker controls over 54% of the residential market.

Management and Organization

Management Team

Rain Maker:	Shane T. White
Partner/Advisor:	Paige White

Marketing Plan

▣ Objective

Key support personnel and job descriptions

Team Manager and Marketing Administrator: Ginger Floyd

Listing maintenance

Agent feedback

Property marketing (ads, flyers, brochures, etc.)

Manage the marketing plan

Seller kits

Buyer kits

Special Marketing Events

Closing Coordinators / Marketing Assistants: Amber Felps and Nicole Henry

Escrow maintenance to closing

Schedule inspections, responses, loan coordination, etc.

Closing packages and gifts

Assist with marketing duties as directed by Ginger or Shane

Accounting/HR: Liz Barta

Performs all accounting functions including writing checks

Prepares yearly budget and P&L statements

Meets with Shane monthly to go over budget and P&L

Performs HR functions including payroll/retirement plans/etc.

Marketing Plan

Objective: To increase the number of qualified buyers and sellers that we will come into contact with that will lead to an increase in sales and profitability for the team and company.

- I. Client Appreciation Program – Continue with CAP program of mailings followed up with phone calls, writing personal notes (at the minimum 5/person/week), client appreciation functions: Christmas in November (?)... may change this year, possible summer party, possible summer movie event, Pop Bys with clients in CAP program (at least May: bulbs/plants for Mother's Day, July: sparklers/flags, December: CDs), business luncheons. This will increase the number of referrals and repeat business that we receive from past clients and our sphere of influence. Continue to increase this database with new clients that we close.
- II. Newsletter – Reduce the number but increase the quality...7000+ per month to Liberty Hill, Bertram, west Georgetown, out of town owners, and past clients. This increases our name recognition, market presence, and is an avenue to advertise all of our listings and generate buyer calls. The newsletter will be printed with full color front and back. We will also revamp the look of the newsletter to incorporate the new STW logo and full color photos. We will get the newsletters out on time every time according to the marketing

Marketing Plan

▣ Specific Marketing Programs Outlined in Detail

- schedule. Approx cost for newsletter only is \$950/month (not including postage).
- III. Closing Gifts – Continue giving gifts at closings that have better shelf life: T-Shirts, Blankets, Mugs, Gift Cards, Drawings of Houses...the Drawings of Houses will be more of a standard gift for buyers who buy houses (not trailers, etc.) We will create a “standard” shelf life gift...especially for buyers.
 - IV. Referral Gifts – Continue to send small tokens for referrals received the day we receive it: Restaurant cards, Barnes & Noble, Movie Tickets, Home Depot, Movie Rentals & Popcorn, Alamo Drafthouse
 - V. Referral Contest – add each person that sends us a referral to the referral contest to win Southwest Airlines gift cards. The person receives one entry into the contest for the first referral and then 5 entries for each other referral sent during the year.
 - VI. Brochures/flyers for each house – Continue to have brochure boxes filled with color flyers with IVR number to call and have every other listing on the back with IVR numbers to call. Flyers to be delivered by Thursday of each week for each listing.
 - VII. Make signs more of a priority, i.e. put up pending/sold signs in a timely manner. Also, use directional signs when the opportunity arises so we have even more of a “presence” in the market. If possible, the directional signs will have our 515-LAND phone number on it. The use of 4X8 signs on highly visible properties, especially commercial properties, is vitally important as well.
 - VIII. Implement the new Pro Step Marketing website. Once set up, cancel the Real Pro Site and start phasing out the #1 Expert site. Look at implementing the SEO from Pro Step Marketing. List all our listings on the 2 sites that will post them to 40 other sites at a minimal cost per Pro Step Marketing.
 - IX. Use virtual tours on at least ½ of our house listings and get them posted on REALTOR.COM
 - X. Use the enhanced listings on REALTOR.COM to promote our listings online.
 - XI. Send an email out to all “Liberty Hill” selling agents with each new listing we get within 1 week. Occasionally on the larger listings, we will use the email flyer program to get it out to 4000+ agents within 2 weeks.
 - XII. Local sponsorships – Sponsor local teams: Little League? (cost may be too high), Basketball, Soccer, etc. Stay within the budget for sponsorships as it can get out of control.
 - XIII. Continue with local newspaper ads to have a “general” presence for those buyers/sellers who pick up these publications.
 - XIV. Full page color ad in the Liberty Hill phone book
 - XV. Where our business came from in 2007 (see attached)
 - XVI. Marketing Calendar (see attached)

Marketing Calendar

January 2008

SUN	MON	TUE	WED	THU	FRI	SAT
		1 	2	3	4	5
6	7	8 CAP	9	10	11	12
13	14	15	16 Newsletter	17	18	19
20	21	22	23	24	25	26
27	28 CRS SELLABRATION 28th-30th	29 CRS SELLABRATION 28th-30th	30 CRS SELLABRATION 28th-30th	31		

May 2008

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5 Mother's Day Cards Mailed	6 CAP	7	8	9	10
11 Mother's Day	12	13	14 Newsletter	15	16	17
18	19	20	21	22	23	24
25	26 	27	28	29	30	31

Analysis of Business

- ▣ What sources of marketing bring you business
- ▣ % of Business from each source
- ▣ % of Business from different product types
- ▣ Volume of Business by Month

Analysis of Business

2007

2007 Analysis of Sources

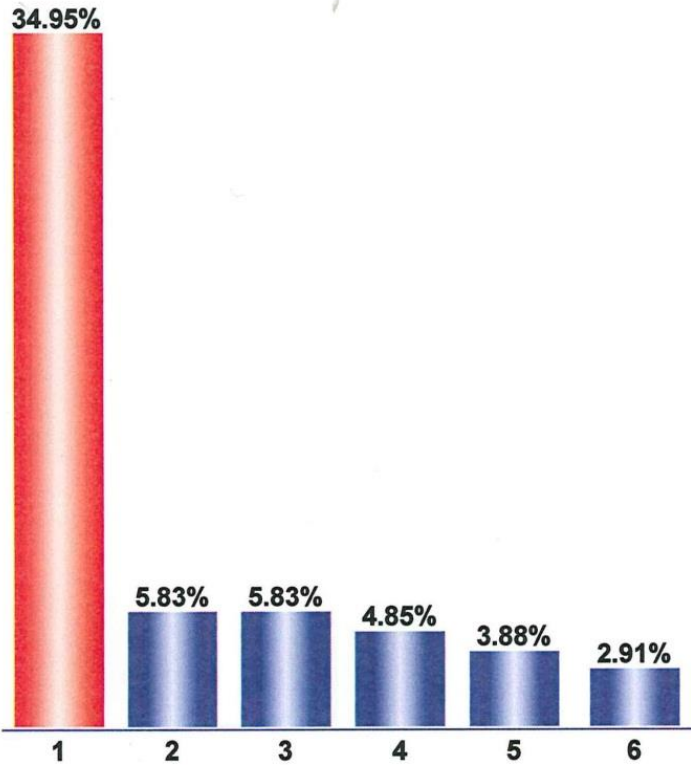
Sources	# Listing Sources	% Listing Sources / Total	# Buyer Sources	% Buyer Sources / Total	Total # Sources	% Total # Sources / Total	Listing Source Vol	% Listing Sources Vol/Total	Buyer Source Vol	% Buyer Sources Vol/Total	Total Sources Volume	% Total Sources Vol / Total
Client Referral	3	2.7%	36	38.3%	39	18.8%	429,000	2.3%	2,663,000	14.8%	3,092,000	8.5%
Listing Referral	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Relocation	1	0.9%	0	0.0%	1	0.5%	338,000	1.8%	0	0.0%	338,000	0.9%
Billboard	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Exp Listings	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Craig's List	0	0.0%	1	1.1%	1	0.5%	0	0.0%	60,000	0.3%	60,000	0.2%
CMA Web call	1	0.9%	0	0.0%	1	0.5%	74,900	0.4%	0	0.0%	74,900	0.2%
Sphere/Influ	13	11.5%	15	16.0%	28	13.5%	2,564,500	13.8%	3,269,938	18.2%	5,834,438	16.0%
Newsletter	0	0.0%	1	1.1%	1	0.5%	0	0.0%	340,000	1.9%	340,000	0.9%
Walk-in	1	0.9%	2	2.1%	3	1.4%	100,000	0.5%	523,000	2.9%	623,000	1.7%
Sign	0	0.0%	13	13.8%	13	6.3%	0	0.0%	2,247,050	12.5%	2,247,050	6.2%
Website	0	0.0%	3	3.2%	3	1.4%	0	0.0%	638,360	3.5%	638,360	1.7%
Agent Referral	1	0.9%	0	0.0%	1	0.5%	80,000	0.4%	0	0.0%	80,000	0.2%
Brochure	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Out/town New	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Reputation	20	17.7%	4	4.3%	24	11.6%	3,772,779	20.4%	475,027	2.6%	4,247,806	11.6%
Just Sold Card	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Builder	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Repeat	19	16.8%	8	8.5%	27	13.0%	3,299,859	17.8%	5,255,800	29.2%	8,555,659	23.4%
Jon	51	45.1%	8	8.5%	59	28.5%	7,527,942	40.6%	1,764,565	9.8%	9,292,507	25.4%
Realtor.com	0	0.0%	1	1.1%	1	0.5%	0	0.0%	150,000	0.8%	150,000	0.4%
REO	2	1.8%	0	0.0%	2	1.0%	104,500	0.6%	0	0.0%	104,500	0.3%
Aggie Newstr	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Buyer/Listing	1	0.9%	0	0.0%	1	0.5%	240,000	1.3%	0	0.0%	240,000	0.7%
For Sale/Own	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Showcard	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
#1 Exp	0	0.0%	2	2.1%	2	1.0%	0	0.0%	599,000	3.3%	599,000	1.6%
	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Totals	113	100.0%	94	100.0%	207	100.0%	18,531,480	100.0%	17,985,740	100.0%	36,517,220	100.0%

Analysis of Business

2007													
MONTH	# of Sides Closed	# of Trans. Closed	# Contracts Written	GROSS SALES VOLUME	GROSS COMM	NET COMM	# Listings	Total \$ Listings	Avg \$ Listings	# Buyers	Total \$ Buyers	Avg \$ Buyers	Total Office Average
JAN	3	3	17	1,041,900	30,960	19,862	2	531,900	265,950	1	510,000	510,000	347,300
FEB	17	14	51	2,057,900	50,967	35,170	10	1,502,000	150,200	7	555,900	79,414	121,053
MARCH	15	14	19	4,854,399	134,916	96,727	9	3,659,199	406,578	6	1,195,200	199,200	323,627
APRIL	14	9	17	2,248,000	64,093	53,993	9	1,714,500	190,500	5	533,500	106,700	160,571
MAY	23	17	14	4,421,649	112,737	78,551	13	2,434,259	187,251	10	1,987,390	198,739	192,246
JUNE	12	10	21	2,578,742	72,690	49,627	5	414,000	82,800	7	2,164,742	309,249	214,895
JULY	13	11	13	5,770,960	219,154	120,995	7	943,055	134,722	6	4,827,905	804,651	443,920
AUG	16	15	35	2,455,440	55,037	40,392	9	1,242,500	138,056	7	1,212,940	173,277	153,465
SEPT	42	23	4	3,426,378	79,258	65,631	21	1,852,000	88,190	21	1,574,378	74,970	81,580
OCT	29	17	12	2,863,476	84,014	62,458	16	1,706,422	106,651	13	1,157,054	89,004	98,741
NOV	9	8	13	1,565,240	48,127	39,861	5	840,500	168,100	4	724,740	181,185	173,916
DEC	14	11	9	3,233,136	80,664	58,777	7	1,691,145	241,592	7	1,541,991	220,284	230,938
TOTALS	207	152	225	36,517,220	1,032,619	722,043	113	18,531,480	163,995	94	17,985,740	191,338	176,412

Market Share

RE/MAX® Premier Market Presence



Market Share by Listing Units Sold

Ranking	Company	MkShare	DOM
1	RE/MAX	34.95%	0
2	City Real Estate and Mortgage	5.83%	0
3	KellerWilliams	5.83%	0
4	ShinOakRealty	4.85%	0
5	RoyalProperties	3.88%	0
6	Century21	2.91%	0

- ☒ Market: AUSTIN
- ☒ Area: LH
- ☒ Type: RES
- ☒ Closing Date: 1/1/2007 - 12/31/07



Based on data compiled from all residential properties sold in Austin Areas These statistics represent the "Sold" Listings of all office locations and independent offices of each multi-office or franchise organization identified which listings were sold by such organization, according to the publications of the Multiple Listing Service for Residential Properties (existing and new) in the Austin MLS areas for the time period indicated. Note: This representation is based in whole or in part on data supplied by Austin MLS. Neither the Association or its MLS guarantees or is in any way responsible for its accuracy. Data maintained by the Association or its MLS may not reflect all real estate activity in the market. Each RE/MAX Office is Independently Owned and Operated.

Budget and P&L

- ▣ Must Have a Budget in Place
- ▣ Review P&L at a minimum on a monthly basis and compare it to your Budget
- ▣ Use your budget and P&L to track your expenses and the return (if any) that expense brings to your business
- ▣ Helps you to identify cycles in your business for cash flow purposes
- ▣ Keeps you from spending money that you didn't plan to spend each year. If it's not in the budget, really analyze it before you spend it!

P&L

- ▣ Have detailed categories for expenses and monitor each month vs. the budget:
 - Advertising
 - Franchise fees (if applicable)
 - General and Administrative
 - Insurance
 - Occupancy
 - Salaries
 - Retirement
 - Taxes



Shane T. White Team

Lead Generation

Tail Gate Party Before A Home High School Football Game



Location: RE/MAX Town & Country Office, located in town on the Highway for maximum exposure.



Cost: Under \$200

Attended: Around 100 past clients and sphere of influence



Food: Grilled hot dogs and sausage and drank bottled water.

Entertainment: Moonwalk, face painting and socializing

Invitations: Sent out postcard invites, email blast reminder and announced on Facebook

Great Face Time!

Results: Over 66% of our business comes from Referrals, SOI, Reputation, and Repeat (including builders) business. Events like this help us to network more with those groups!!



Client Parties



Christmas Event



Summer Event



VIP Services

- Faxing Service (Send and/or receive)
- Scanning/Emailing
- Internet Access for E-mail & Searches
- Photo Copies
- Color Copies
- RE/Max Town & Country Moving Van
- Moonwalk
- Notary Public Services
- Market Analysis of your property (no obligation, plus great information to have current)
- Conference Room Available for Small Meetings



Fax

Notary



Closing Gifts & T-shirts

Shelf life gifts include blankets or beach towels, mugs with coffee, and koozies

Cost on blankets and towels are between \$5-8 plus \$6-8 embroidery
Mugs are \$4
Koozies are \$.75 each

Elementary P.E. departments sell shirts to kids – kids get free entry into game and run across field before start of game
Donated shirts, has marketing on back, but school makes 100% profit



School Events

- We gave every employee in the school district a Panther T-Shirt with our marketing on back!



- We brought the RE/MAX Hot Air balloon in as a hands on Science demonstration for the kids!

Q&A

Thank you, and go out and have
your most profitable year ever!

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