THE REAL ESTATE AGENT'S guide TO BUILDING SYSTEMS

KELLY SHIPP SYSTEMS

Hi there!

I'm so proud of you for making the decision to get organized in your real estate business! This guide will show you my step-by-step method for developing systems as well as a list of systems you can create to help get you started. At the beginning of the guide, we will talk about the key elements of every system. We will then review how to identify your organizational style so you can choose the correct tools for your workflows. I've also included a worksheet you can use to help create each system.

At the risk of sounding cliche, please remember that Rome wasn't built in a day. To avoid feeling overwhelmed by what seems like a large undertaking, just pick one to start with. Once you've built that system, then you can move on to build your next one.

As your business grows you will restructure these systems to fit your needs. You may introduce different tools to help automate your systems, or you may hire employees to delegate more tasks to. No matter where you are in your business, the sooner you start building your systems, the easier it is to reorganize them to grow with your business.

If you ever get stuck or have any questions, I encourage you to reach out to me! I'm always here to help you with any questions. I would be honored if you considered me your Real Estate Business Systems Specialist! Simply email kellyrshipp@gmail.com.

Happy Systems Building!

Kelly Shipp

INTRODUCTION

Why build systems in your business?

Do you already have some systems in your real estate business? Before you answer "yes!" let me be very clear: your CRM is NOT your system. Your to-do or task list manager is NOT your system.

So what is a system?

sys·tem
[ˈsistəm] *noun*
a set of principles or procedures according to which something is done; an organized framework or method.

Let's use your car as an example. When you're driving down the road you don't want to be constantly wondering if you need more gas. So the manufacturers' built in tools to notify you when you need to stop and refuel. Your car has a gas gauge and an "empty" notification to let you know when it is absolutely necessary to stop (or if you're like me, how many miles you can go after "E" before you stop...amiright!?).

The system isn't the gas gauge or the notification light. Those are all of the TOOLS you use to make your car run. The system is the whole process from the time you are notified that you are out of gas to the time you put fuel in the tank and drive away.

So back to our original question, why should we build systems in our business? Well, when was the last time you put gas in your car? Do you specifically remember thinking about every step? Did you stress about when was the next time you needed to refuel? No, you probably went through the motions mindlessly and even had time to scroll on your phone as you did it.

This is why we need systems in our real estate business! I think we can all agree that real estating is HARD, you guys! Maintaining relationships with our database, finding properties for our buyers. All of these things weigh heavy on our brains and it's exhausting and tiresome. Give yourself a break! Organizing systems and workflows for the repetitive tasks in your business will help you focus all of your mental energy on selling real estate.

ESSENTIAL

elements

There are certain things that every system must have in order for it to be effective.

THE TRIGGER

Remember our car analogy? When do you know you need to get gas? Well if you're my dad, it's when the gauge reaches 1/4 of a tank full. If you're me, it's about 10 miles after the gauge says "0 miles to E". (Dad if you're reading this I'm sorry, it's the way I am...just love me, okay?). See, all systems need a trigger to let you know when your workflow needs to begin. In your real estate business, there are 2 kinds of triggers:

EVENT-BASED TRIGGER

An event-based trigger identifies when the workflow needs to begin when something happens. Examples are when your transaction coordination workflow system is triggered when a new contract goes binding. Your new listing workflow is triggered when your client signs the listing agreement.

SCHEDULED TRIGGER

A scheduled trigger is one you've set on your calendar to remind you at a specific time. An example of this is your open house workflow. By scheduling all of your open houses on your calendar for the year, you can set calendar notification reminders to alert you to start your open house workflow process.

THE RIGHT TOOLS

Every system needs the right tools for the job. Before you go downloading apps or researching CRM's (umm...don't get me STARTED on real estate CRM's you guys. That's a rant for another time), let's talk about organizational styles. The way I see it, there are 3 types of organizational styles.

DIGITAL

If your organizational style is digital, you store all of your documents and data on your phone or your laptop. You prefer reading workshop materials from PDFs on your laptop or tablet, which is how you're reading this guide. You have a to-do list app that you rely on for your daily activities. You rarely find the need for a printer. You prefer to share marketing materials via email or text rather than handing out print documents.

ANALOG

If you're an analog organizational style, you probably use a journal (or as I like to call it, "my brain") for your to-do lists and tasks, maybe even your daily schedule. You organize data and reference materials in binders and files. You've probably printed this guide to read on paper. You use printed marketing materials.

COMBINATION

This is me! One of my biggest "ah-ha" moments in life was realizing I didn't have to pick one organizational style. I switch between the two depending on what I'm doing at the moment or what season of life I'm in.

I love having "my brain" with me to jot down quick notes and ideas, or for my weekly "brain dumps". I also enjoy the ease of having everything on my phone or laptop when I need it. I like to have printed meeting materials in front of me so I can pay attention without getting distracted by the seven other tabs open in my browser. I also like to be able to access those notes in the future so I scan them to dropbox and tag them for easy retrieval.

> **"Technology and tools are useful and powerful when they are your servant and not your master."**
>
> ***-Stephen Covey***

So what organizational style are you? Identifying your style will help you choose the right tools so your systems are customized to you.

I can't stress this enough: your system has to work for YOU in order for it to be effective. Chad from down the hall can explain his awesome lead gen system all he wants, but if his organizational style is strictly digital and yours is analog, it's never going to work for you. A great system is built around the person it's working for, and uses the tools that sync best to your organization style.

HOW TO BUILD A system

System building is an INVESTMENT of your time. Yes, It's going to take a chunk of time (that you may feel like you don't have) up-front to build your workflows. But the future payout is not just time saved but costly mistakes avoided. A great written system has automations and templates so you're not dropping the ball on simple things or repeating the same task over again. And of course, all of this equals future time saved that, one day, will outperform your initial investment.

In order for this process to work, you should schedule time in your calendar each week to work on this task, and only this task. I encourage you to treat this as an important weekly appointment on your calendar. By scheduling time in your calendar each week for this process, you've created your first trigger for your system on building systems!

At the end of this report is a template to use for each system you build using this 5 step process. Whether you are a digital or analog organizational style, I encourage you to print it out and use pen and paper for step one, which is the brain dumping phase. You'll have a chance to clean it up and re-organize it into digital form later in step two.

"For every minute spent organizing, an hour is earned.."

-Benjamin Franklin

THE 5

steps

STEP

1

***Brain Dump* your task list.**

Start by writing down all of the tasks that you need to do from beginning to end. Don't worry about timelines, how you complete the task, or even if something is out of order...just furiously write down tasks.

STEP

2

Identify your Timeline and Trigger.

At this point, you may have a scribbled mess of a task list. If so, congrats! You did step one correctly. Now go back and clean up your list and set timelines. You'll do this by printing out another template (or you can type directly into the pdf this time for all of my digital and combination organizational style friends).

Analyze each task for only two things: the order you do them in, and the timeline each task needs to abide by. If you're creating your transaction coordination system, for example, some tasks will be calculated by so many days AFTER the binding agreement date, and some tasks will be calculated BEFORE the closing date. Other tasks won't necessarily have a contractual timeline, but you should decide on a standard timeline.

Once you have your task list in order and your timeline line complete, don't forget to identify your trigger and record it at the top of your form.

STEP 3

Identify the delegatable tasks.

If you're a control freak like me I need you to take a deep breath and just hear me out, okay? If you're going to scale your business to grow beyond your imagination, you've got to delegate! I know what you're thinking, "I can't afford to hire an admin right now!". Listen, there are so many things you can do to delegate tasks! I beg you to consider contracting the following people before you even THINK of hiring a full-time admin:

- Transaction Coordinator
- Listing Coordinator
- Sign Runner (got kids or know someone needing a summer or after school job?)
- Bookkeeper
- Virtual Assistant on Upwork or Fiverr
- Marketing Consultant and/or Social Media Manager

Get creative, think outside of the box! Carefully review your task list and make it your mission to find some tasks you can delegate, even if it's just a couple. Once you taste the sweet freedom of not doing everything yourself, it will get easier to delegate more as your business grows...I promise!

STEP 4

Choose your tools.

Hey digital friends, we're finally at the step where you can fire up your apps, Chrome extensions, and project management sites! Each task will have a tool you use to execute or organize data. Additionally, your entire system will have a management tool. In the example of our transaction coordination system, you will use email or text message for a client communication task and Dotloop or Docu Sign for obtaining disclosure signatures. Your entire system will also be managed by a tool, whether that be folio, Trello, or a printed checklist you keep in a binder. There may be some exceptions to this, but give each task tool and the overall system tool consideration before you decide it doesn't apply.

STEP 5

Create templates and automations

Templates are your best friend in systems. The type of template I use the most in my business is an email template. For all of those emails you write over and over again, save a template and it just takes a little tweaking to update and personalize before sending it out. I personally like to use the Gmail app for all of my emails. They have a function to save email templates if you click the three dots to the left of the trash can in a new message. You can also save your templates in a notes app like apple notes or Evernote. The beauty of all of these options is they are accessible from your laptop or your phone, and the latter two examples would work for your text message templates as well.

Review your task list to see if you can automate anything. Email systems like MailChimp or ConvertKit allow you to send a series of emails or drip campaigns. You can build automated campaigns for listing or buyer consultation appointment follow-ups, database nurtures or past-client follow-ups.

Congratulations, you just built a system! Save it where you organize your files, whether that be Dropbox, Evernote, Trello, or in a 3 ring binder on the shelf by your desk labeled “systems”. Having your systems recorded allows you to delegate easier and train employees more efficiently, once you’re ready for that step. as your business grows, by reviewing your systems in written form, you can identify what’s working for you and what needs to change.

SYSTEMS

checklist

Use this checklist to help you choose which system you want to create first.

BUSINESS SYSTEMS

___ Commission Check Workflow

Once your commission check is deposited, how much do you put back into your business? Where do you transfer your tax savings? How much do you pay yourself?

BUYER SYSTEMS

___ New Buyer Consultation

Having a system in place to educate new buyers on the home buying process helps secure your role with them as their agent. You can have a formal meeting at your office or a coffee shop or run through a quickie session at the first house you show them. Make sure you have a system in place to highlight all of the points you want them to know about working with you as an agent.

___ Writing an Offer

Your buyers found their dream home and now it's time to write the offer. Ever find yourself asking the same questions over and over as you walk out the door with your clients? What names do you want on the deeds with legal spelling? Are they okay with a 10-day inspection period? Is there any personal property to be included in the offer? Having an email template that you can send to your buyers before you even start your car will result in all the information waiting for you in your inbox by the time you get back to the office (or if we're being real...your couch) to write up that solid offer.

___ Transaction Coordination (Buyer)

This is a big one with lots of templates and delegatable tasks. Luckily once you have your system recorded on paper you'll be able to share your expectations with your transaction coordinator on how you want your transaction workflows to be processed.

SELLER SYSTEMS

___ Potential Listing

You've sniffed out a new potential listing. Create a system to follow up until you get that listing appointment.

___ New Listing Appointment

Congrats on that listing appointment! Make sure you have your system in place so you can be ready to impress at a moment's notice.

___ Live Listing Pre-Contract

You've got the listing and you need a workflow to get you from signed agreement to live on the MLS. Having a listing coordinator is a great way to delegate tasks to free up your time to work on getting more listings.

___ *Transaction Coordination(Seller)*

Representing a buyer has very many different (and more) tasks than representing a seller. Make sure to create two separate workflows for each situation.

DATABASE NURTURE SYSTEMS

___ Monthly Mailed Newsletter

Monthly *mailed* *newsletters to your database is the best way (in my opinion) to get personal and stay top of mind. Begin your system by batch-creating 12 months of content at the beginning of the year. Then a monthly calendar reminder to review and mail will trigger your system to ensure you are consistent and timely with your database communication.*

___ Email Marketing

While mailed newsletters are very powerful, email marketing is still a great resource and has its place in your systems for occasional broadcast emails to your database. Spend time at the beginning of the year to batch create valuable content for your database. Automate your marketing emails by using the scheduling function on your email system.

___ Past Client Followup

Don't let your past clients fall off the map once they've closed. A great follow-up system will ensure you get referrals and reviews from happy clients.

LEAD GENERATION SYSTEMS

___ Matchmaking

Matchmaking buyers to houses is one of the most effective ways to solidify a lead. Create a matchmaking system to execute every day for maximum benefits.

___ Open House

The best way to optimize this lead gen model for fresh leads to work every week is to do them often and do them well. Systematizing your process will make them a breeze!

___ FSBO

Using a system of phone call followups, educational emails and informative pop-bys will help you win the listing!

___ Expired Listing

If expired listings are your thing, then you know consistency is key. Create a system to ensure you're maximizing your efforts can still be lucrative...even in this market!

___ Facebook Ad

If you're spending money on your lead gen system you need to be able to track if your money is giving you a return. Creating a system will ensure that you are using every dollar to the best of your abilities.

"In order for any business to succeed, it must first become a system so that the business functions exactly the same way every time down to the last detail"

-Rick Harshaw,
Monopolize Your Marketplace.

WORKFLOW BUILDER

System

Trigger

System Management Tool

Notes

TASK	TIMELINE				ASSIGNED	TOOL(S)
	#days	before / after		event		
	#days	before / after		event		
	#days	before / after		event		
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