

prialto

Supporting a Top Real Estate Producer

Prialto delivers more leverage to industry leader



Member Spotlight

"My Prialto PA has learned my real estate world very quickly, has gone beyond the call of duty countless times, and saved me many hours of admin work."

- Karen Mendelsohn Gould, Real Estate Agent

COMPANY NAME: Compass

JOINED PRIALTO: August 2018

COMPASS

Prialto Amplification



Nurture Your Network

Prialto help our member stay top-of-mind by supporting her outreach campaigns and follow-ups



Save Time

Karen Gould has more time to spend with clients since she is able to offload all of her miscellaneous admin tasks to her assistant.



Leverage Insights

Prialto ensures Karen Gould has the latest insights by keeping her CRM up-to-date and providing her with curated research.

A Top Producer Needs Additional Leverage

Karen Mendelsohn Gould has been a top agent in the San Francisco residential real estate market for over 20 years. She focuses on the selling, purchasing and leasing of fine homes for her clients, including condo conversions, TICs, co-ops, land sales, tenant occupied properties, residential leasing, property management, investment property analysis, and down-to-the-studs remodels. A consistent top producer, in 2016 she was ranked among the top 2% of agents globally.

Despite her success, Karen, like many other top producers, struggled stay on top of her all her admin and marketing work and realized she needed support to be able to continue to provide exceptional service to her clients.

That's where Prialto came in.

Setting Goals to Ensure an ROI

Before investing in our service, Karen wanted to set up measures to ensure she got enough value. So, she asked us to help her meet the following goals:

Spend more time with clients: To do this, she needed an assistant who can tackle a wide variety of admin tasks quickly and with minimal instruction. The PA also needed to proactively resolve admin-related issues as they arise.

Keep contacts organized and updated: Like most real estate professionals, Karen's contacts were stored in many places. This made it difficult to find and synchronize contact information. She needed a PA to quickly consolidate all of her connections and take ownership for ensuring they stay organized.

Consistently launch outreach campaigns: The key to any top producer's success is staying top of mind in your network so that people immediately reach out to you when they need to buy or sell a home. However, this work is time-consuming so, Karen needed a marketing savvy PA who could manage her campaigns.

To make it all happen, Prialto assistants took ownership of tasks including:

Contact management: Before Prialto, Gould rarely had time to keep her contacts up-to-date. As a result, it was difficult to find accurate information about her network. Her assistant consolidated all of her contacts in her CRM and keeps it updated. Now, it's easy for her to keep track of her connections.

Outreach support: Gould used to have to set aside valuable time from her day to manage her outreach campaigns. The process was time-consuming and pulled her away from more important activities. Now, she just has to write the materials and her assistant takes care of formatting, campaign logistics and all top-of-funnel communication.

Document preparation: Like many realtors, Gould was often frustrated with the time-consuming and tedious process of preparing documents. Her assistant lightens her load by formatting, filling in missing information and, when needed, getting her documents set up in DocuSign.

Listing support: Keeping listings up-to-date is easy with a Prialto PA. Gould simply sends her PA listing information and they take care of updating it on her site and other platforms. Her PA will also take care of reaching out to people whose listings are expiring soon.

"Prialto's managed service approach to the business is very refined with its organizational structure, best practices experience, a back up PA, and the engagement manager that serves as my consultant to discuss and plan additional processes to be offloaded. The Prialto security infrastructure is also a key part of instilling confidence in their service. They are process driven and highly methodical. Also excellent at documenting all of my processes to ensure seamless continuity when my backup PA is covering." - Karen Gould

Keys to success

Karen is succeeding with Prialto because she has committed to adopting these types of Prialto best practices:

- ✓ Spend time upfront with assistants so that they fully understand your needs. It's critical to build strong relationships first.
- ✓ Start with small tasks that can be done well and build trust in the assistant's abilities.
- ✓ Measure and calibrate to see what's working and what isn't.
- ✓ Provide consistent feedback to assistants. If they aren't meeting expectations, let them know quickly.
- ✓ Be patient, especially early on. Like most others, assistants will make occasional mistakes. Follow through with the process — and provide direct feedback.
- ✓ Keep expectations in check. Prialto assistants are well trained, skilled, and proactive but they aren't mind readers. Spend the time and energy up front teaching assistants how to work with you.

Prialto can help you be a top producer

We want to help you be a top producer and achieve your goals by giving you more:

- **TIME:** Spend more time with clients and prospects by offloading all of your admin work.
- **INTELLIGENCE:** Leverage curated market research and an updated CRM to make better-informed decisions
- **WORK-LIFE BALANCE:** Focus on the parts of your job that you love most and enjoy greater work-life balance.
- **SALES PROCESS:** Deliver fortune 500 execution at SMB prices. Leverage CRM expertise and best practices. Provide ongoing training and drive adoption
- **MANAGEMENT EXECUTION:** Deliver quality data for better decisions. Enforce consistent follow through. Measure effectiveness

Call us at (650) 517-7100

www.prialto.com