

OUR PLAN FOR  
CREATING A NEW VISION



# WHO WE WERE

## CURRENT VISION

Our vision is to be the provider of choice in our communities for comprehensive real estate and financial solutions.

## CURRENT MISSION

We will achieve our vision by utilizing our world-class team of professionals and systems to guide people in making great real estate and financial decisions.

## CORE VALUES

T.I.P.E {Teamwork | Integrity | Passion | Excellence }





# WHO WE WANT TO BE

## NEW VISION

To forever serve our communities by creating lifetime relationships and legendary experiences throughout our customer's financial and Real Estate journeys.

## NEW MISSION

To be legendary.

## CORE VALUES

Unchanged

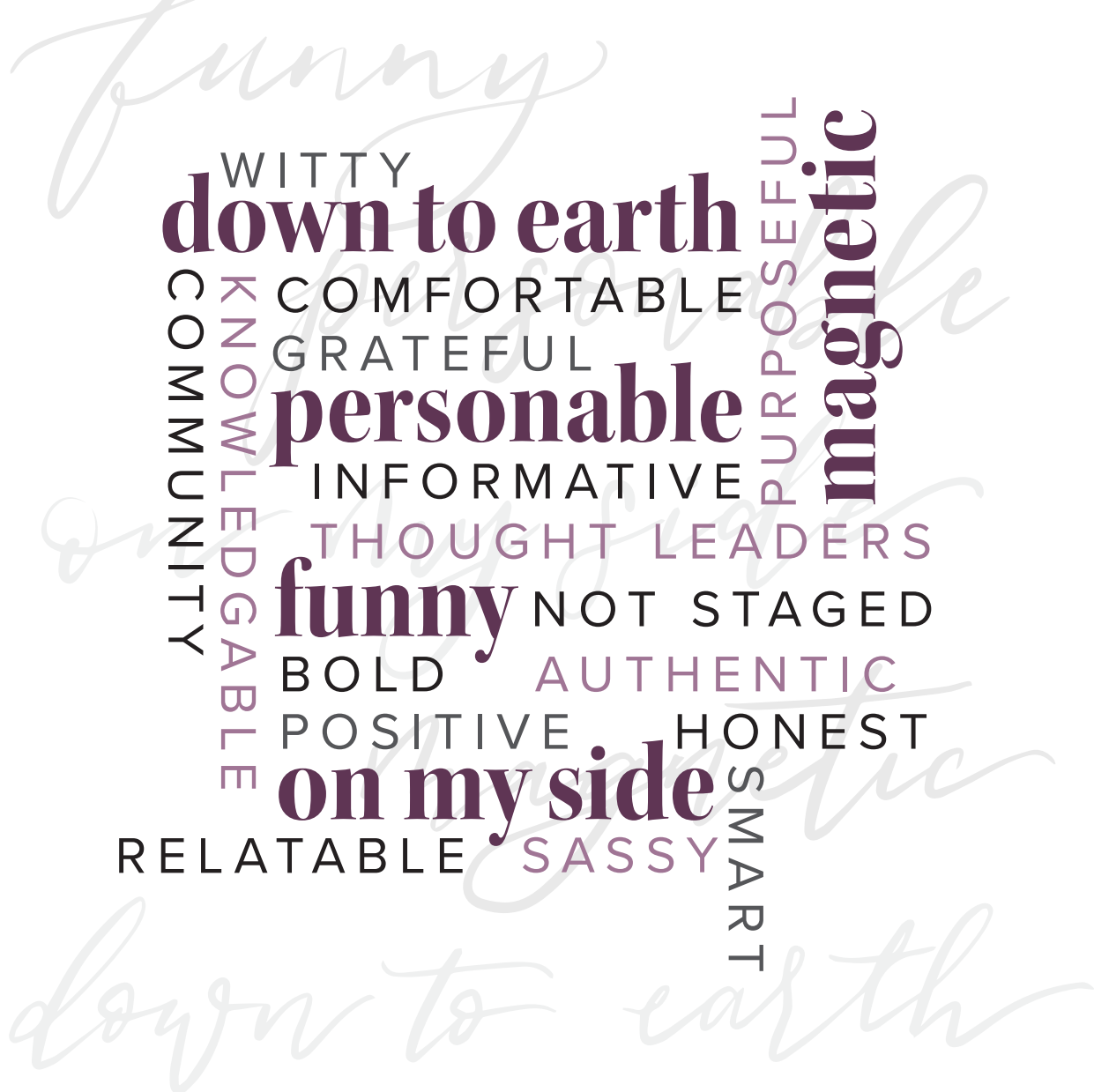
T.I.P.E {Teamwork | Integrity | Passion | Excellence }



# WHO WE WANT TO BE

## BRAND VOICE

If Florida Properties Group was a person this is how we want consumers to describe our brand any time they see anything written from us – whether it's a social media post, a guide, a magazine ad, etc. What we say and how we say it matters if we want our community to see us a specific way. These words should be used to measure how you sound when communicating to the general public. At the end of the day, we are humans serving other humans and that's what we want to get across in the way we write.



# WHO WE WANT TO BE

## BRAND IMAGE

The images we use and the styling of each piece showcases who we want to be if Florida Properties Group was a person. Your marketing pieces should be measured against the words below when promoting to the general public. At the end of the day, we are genuine people who work hard and that's the point we want to get across.





# OUR BRAND PROMISES.

OUR MISSION IS TO BE THE T.I.P.E. OF COMPANY THAT PROVIDES LEGENDARY SERVICE. By choosing to be a member of our team, you're agreeing to carry out our brand promises in all you do. This means being committed to putting relationships above transactions. In order to do that, we are asking each team member to commit whole-heartedly to our brand promises on the next page.

1. TO MAKE **COMMUNICATING** WITH EVERY CUSTOMER A TOP PRIORITY AT EACH OPPORTUNITY, EVEN WHEN IT MIGHT SEEM WE HAVE NOTHING NEW TO TELL THEM.
2. TO BE THEIR **FOREVER REAL ESTATE ADVISOR** EVEN WHEN THEY'RE NOT ACTIVELY BUYING OR SELLING.
3. TO TAKE **FULL OWNERSHIP** OVER THE TRUST THEY'VE PLACED IN US AND ACT ACCORDINGLY.
4. TO NEVER LEAVE ANY DOUBT THAT WE ARE PLACING **THEIR BEST INTEREST** ABOVE ALL ELSE.
5. TO **TRULY LISTEN** TO WHAT THEY'RE TELLING US SO THEY GET PERSONALIZED SERVICE.
6. TO WALK THROUGH THEIR JOURNEY ALONGSIDE THEM, AS THEIR **PARTNER**.
7. TO EXERT A LEVEL OF SKILL, KNOWLEDGE AND EXPERTISE SO AT EVERY INTERACTION THEY FEEL LIKE THEY'VE CHOSEN A **REAL ESTATE GENIUS**.
8. TO NEVER PUT THEM IN A POSITION TO DOUBT WE HAVE THE **HIGHEST INTEGRITY** IN ALL THAT WE DO.

— T.I.P.E {TEAMWORK | INTEGRITY | PASSION | EXCELLENCE} —



#1

## COMMUNICATION

TO BE LEGENDARY, WE ASK YOU TO COMMUNICATE AT MINIMUM AT THESE MILESTONES:

- Pre-showing
- Post showing
- Contract- Receipt and Acceptance
- Need for Price Reduction
- Critical Dates- Prior to and after each date
- Post-closing- at least quarterly for first year
- Active Clients: Weekly for check-in
- Bi-Annual voice to voice communication with your entire database

### THIS IS HOW YOU CARRY OUT THIS STANDARD

- Use one statement to affirm Standards at each communication point
- Stop and summarize any time a decision is made or information is shared. Finish the summary by using one tie down question.
- Demonstrate that you get them by acknowledging (naming) the EMOTION they're feeling at their current stage. May vary per person.

### STATEMENTS TO AFFIRM STANDARDS

- Making sure you have a legendary experience is my responsibility. How else can I help you?
- I don't have information to share but wanted you to know I am working on...
- I want you to know I'm here for you. Is there any way I can serve you today?

### TIE DOWN STANDARDS AFTER SUMMARY

- Did I hear that correctly?
- Is that what is most important to you?
- Did I prioritize that correctly?
- Did I miss anything you'd like me to take care of for you?



# 2

## FOREVER ADVISOR

TO BE LEGENDARY, WE ASK YOU TO CONTRIBUTE TO YOUR RELATIONSHIP AT MINIMUM AT THESE MILESTONES:

- From the moment you meet them and beyond
- At any time when you can invest in the relationship you've built
- At minimum, we ask you to communicate with all your contacts bi-annually

THIS IS HOW YOU CARRY OUT THIS STANDARD

- Advise them on the value of their current home or investment
- Setup Property Watch for any active buyers
- Use Ninja Flow or other relational drip campaign to stay connected
- Annual Real Estate Review
- Bi-Annual voice to voice check-in
- Stop and summarize any time a decision is made or information is shared. Finish the summary by using 1 tie down question.



### STATEMENTS TO AFFIRM STANDARDS

- Making sure you have a legendary experience is my responsibility. How else can I help you?
- I don't have information to share but wanted you to know I am working on...
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### TIE DOWN STANDARDS AFTER SUMMARY

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#3

## FULL OWNERSHIP

TO BE LEGENDARY, WE ASK  
YOU TO COMPLETELY OWN THE  
EXPERIENCE YOUR CUSTOMER  
HAS IN THESE WAYS:

- Make sure all communication is timely and delivered in the way the customer wants.
- Do all things with the utmost integrity.
- Do not make excuses. If it is a customer's reality, it should be ours.
- Do not take on more than you are capable of handling exceptionally well.
- Make sure that you know and abide by all time frames, whether detailed in a contract or by the customer.
- Be solution driven.

### THIS IS HOW YOU CARRY OUT THIS STANDARD

- If a problem is presented, research and present the customer with two potential resolutions.
- If there is tension, confusion or lack of trust we ask you to have a direct conversation with the customer to address and resolve.
- Give knowledgeable solutions and direction for how they're feeling at their current stage. May vary per person.

### STATEMENTS TO AFFIRM STANDARDS

- Making sure you have a legendary experience is my responsibility. How else can I help you?
- I don't have information to share but wanted you to know I am working on...
- I want you to know I'm here for you. Is there any way I can serve you today?



### TIE DOWN STANDARDS AFTER SUMMARY

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- Did I prioritize that correctly?
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# 4

## THEIR BEST INTEREST

TO BE LEGENDARY, WE ASK YOU TO COMPLETELY OWN THE EXPERIENCE YOUR CUSTOMER HAS IN THESE WAYS:

- When we are advising or guiding decisions
- When we are presenting options and potential outcomes
- When we are providing resources for our customers to use
- Throughout your relationship with the customer
- Remembering the customer is the decision maker and you're their trusted advisor

THIS IS HOW YOU CARRY OUT THIS STANDARD

- Use one Temperature Check Standard after presentation of any options.
- If presenting a solution or giving an option, give the facts and justification (the Why) to provide clarity.
- If you mess up, forget to do something, learn new facts, or fail to deliver legendary service, own it. Call the client, acknowledge it, and do better.
- Explain the process and next steps at each milestone. Reconfirm what your customer wants of you and then do it.

### STATEMENTS TO AFFIRM STANDARDS

- Making sure you have a legendary experience is my responsibility. How else can I help you?
- I don't have information to share but wanted you to know I am working on...
- I want you to know I'm here for you. Is there any way I can serve you today?

### TIE DOWN STANDARDS AFTER SUMMARY

- Do you feel this is the best option?
- Are there other ideas you would like me to research and present?
- Are there other options you would like me to explore?
- Are you comfortable moving forward?



# 5

## TRULY LISTEN

TO BE LEGENDARY, WE ASK YOU TO LISTEN TO YOUR CUSTOMER IN ORDER TO DELIVER PERSONALIZED SERVICE IN THESE WAYS:

- When you speak with your customer, ask questions to better understand them and their needs.
- When you sense a change, whether via an actual conversation, a change in how they engage or alternate way, make sure to initiate a conversation. Listen to them and see if you can help.

### THIS IS HOW YOU CARRY OUT THIS STANDARD

- Listen to what they tell you. Ask questions for a deeper understanding.
- Stop and summarize any time a decision is made or information is shared. Finish the summary by using 1 tie down question.
- Use one Statement to affirm standards at each communication point.
- Personalize your recommendations based on what the customer has told you their needs are.
- Use the Seller Pre-listing Questionnaire or Buyers Needs Assessment sheets to provide consistent service and for notes.

### STATEMENTS TO AFFIRM STANDARDS

- Making sure you have a legendary experience is my responsibility. How else can I help you?
- I don't have information to share but wanted you to know I am working on...
- I want you to know I'm here for you. Is there any way I can serve you today?

### TIE DOWN STANDARDS AFTER SUMMARY

- Do you feel this is the best option?
- Are there other ideas you would like me to research and present?
- Are there other options you would like me to explore?
- Are you comfortable moving forward?



# 6

## PARTNER

TO BE LEGENDARY, WE ASK YOU WALK ALONGSIDE YOUR CUSTOMERS THROUGHOUT THEIR JOURNEY DURING THESE TIMES:

- At any possible milestone, whether stressful or celebratory, engage with your customer. Use this time to address the emotion they may be feeling.
- Before, during and after they need you, be an impactful resource for your customers.
- Throughout your relationship with your customer. This does not have to be Real Estate specific.

THIS IS HOW YOU CARRY OUT THIS STANDARD

- Use a Buyer and Seller kit for each active client.
- Use Ninja FLOW to stay connected with each customer.
- Be present with your customer so you can predict their needs ahead of time.
- Keep customers informed of happenings in their community- personal and real estate specific.



### STATEMENTS TO AFFIRM STANDARDS

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- I don't have information to share but wanted you to know I am working on...
- I want you to know I'm here for you. Is there any way I can serve you today?

### TIE DOWN STANDARDS AFTER SUMMARY

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- Are there other options you would like me to explore?
- Are you comfortable moving forward?

#7

## BE A REAL ESTATE GENIUS

TO BE LEGENDARY, WE ASK YOU TO BE A REAL ESTATE GENIUS AT THESE MILESTONES:

- Prior to agreeing to partner with them for their journey, we ask that you share your knowledge of the process and current market standards.
- When a problem arises, we ask that you give thorough options with pros and cons of each scenario presented.

THIS IS HOW YOU CARRY OUT THIS STANDARD

- At each milestone, inform the customer of what step comes next and what the 2 most likely outcomes will be.
- Do not give advice, guidance or direction if you are uncertain.
- Take pride in education- whether it be real estate, technology, or CORE service categories.
- Rely on your team for alternate perspective. Use your market president and peers to collaborate on various options.
- Share your knowledge with your customers so they can make informed decisions.



### STATEMENTS TO AFFIRM STANDARDS

- Making sure you have a legendary experience is my responsibility. How else can I help you?
- I don't have information to share but wanted you to know I am working on...
- I want you to know I'm here for you. Is there any way I can serve you today?

### TEMPERATURE CHECK STANDARDS AFTER SUMMARY

- Do you feel this is the best option?
- Are there other ideas you would like me to research and present?
- Are there other options you would like me to explore?
- Are you comfortable moving forward?





#8

## HIGHEST INTEGRITY

TO BE LEGENDARY, WE ASK YOU TO WORK IN A WAY THAT YOUR INTEGRITY IS NEVER QUESTIONED AT EACH OF THESE MILESTONES:

- When working with your customer, the partnering agent or the other customer.
- When another party is relying on you for communication or guidance.
- Always be mindful your personal and professional life are intertwined in the profession you have chosen.

### THIS IS HOW YOU CARRY OUT THIS STANDARD

- Do what you say, when you say and always be honest.
- Don't lie, hide from or stretch the truth.
- If you cannot do what you've said you're going to do, communicate promptly.
- Put others interests and well-being above your own.

### STATEMENTS TO AFFIRM STANDARDS

- Making sure you have a legendary experience is my responsibility. How else can I help you?
- I don't have information to share but wanted you to know I am working on...
- I want you to know I'm here for you. Is there any way I can serve you today?

### TIE DOWN STANDARDS AFTER SUMMARY

- Did I hear that correctly?
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- Did I prioritize that correctly?
- Did I miss anything you'd like me to take care of for you?

# PROMISE TO OUR CUSTOMER.

BY CHOOSING US AS YOUR ADVISOR THROUGHOUT YOUR REAL ESTATE JOURNEY, we understand the trust you've placed in us. Our mission is to be the T.I.P.E. of agent that provides you legendary service. In order to do that, we want to outline our Service Promises to you.

1. To make **communicating** with you a top priority at each opportunity, even when it might seem we have nothing new to tell you.
2. To be your **Forever real estate advisor** even when you're not actively buying or selling.
3. To take **full ownership** over the trust you've placed in us and act accordingly.
4. To never leave any doubt that we are placing **your best interest** above all else.
5. To **truly listen** to what you're telling us so you get personalized service.
6. To walk through your journey alongside you, as your **partner**.
7. To exert a level of skill, knowledge and expertise so at every interaction you feel like you chose a **Real Estate Genius**.
8. To never put you in a position to doubt we have the **highest integrity** in all that we do.

If at any point you do not feel we are living up to these promises, we encourage you to have an honest conversation with us so we can immediately make adjustments. We also ask you to complete a survey afterwards so we can measure how we are performing to these promises.

T.I.P.E {TEAMWORK | INTEGRITY | PASSION | EXCELLENCE}







**BERKSHIRE HATHAWAY**  
HomeServices  
Florida Properties Group