



THE ULTIMATE REAL ESTATE PLAYBOOK: SYSTEMS THAT WORK

A Process for Standardizing Processes

Creating SOPs to Avoid Confusion and Hit Your Goals

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 Compass

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At a GLANCE

It doesn't matter what your role is – if you work at the Jamie McMartin Group, you know exactly what you're doing at every stage of every process. That's because Jamie and her team have created air-tight Standard Operating Procedures for avoiding mistakes, ensuring everything runs smoothly, scaling rapidly, and hitting enormous goals.



**Houston,
Texas**

PRIMARY MARKET



\$480k

AVERAGE PRICE POINT



17

YEARS IN REAL ESTATE

2022 PRODUCTION STATS

565

TRANSACTIONS

\$264,000,000

SALES VOLUME

\$4,000,000

GCI

CORE CLIENTELE

✓ Upsizing families

PRODUCTION

53% | 47%

Buyers | Sellers

TEAM STRUCTURE

✓ **26 agents**

✓ **9 staff members**

Jamie **ON COACHING**



To say coaching has been a positive experience for myself and my business would be an understatement. The expertise provided by our coach has deepened my understanding of the market and empowered me to make informed business decisions. Also, networking opportunities have facilitated collaborations and partnerships that have completely changed my business for the better! Ultimately, we've been able to increase deals, achieve higher profits, and expand our client base.



BY THE NUMBERS

21

Sets of SOPs in operations library

4

Departments represented
with SOPs

100%

Increase in efficiency as a result
of SOPs





THE STORY

In early 2022, Jamie's operations team at the Jamie McMartin Group recognized that if they were to reach their 2023 goal of 500+ listings, something needed to change. Their current systems couldn't support that level of growth. To hit a number that ambitious, their agents needed user-friendly resources and a plug-and-play experience so they could do more work with less strain. So Jamie and her team got to work.

They tightened their Standard Operating Procedures (SOPs) even further, refining and broadening them to cover even more processes, with an emphasis on marketing listings. There needed to be thorough documentation for every step.

SOPs don't just make the experience better for agents but for clients as well. They prevent errors, answer questions before they're asked, keep the support team aligned, and ensure that everything runs seamlessly. They make everyone feel confident, which also helps team members master their roles more quickly.

Jamie uses SOPs at both a micro and macro level for scaling her business. With everything running smoothly, these systems allow her leadership team to focus on the big picture instead of constantly putting out fires or working on things that could be delegated.



THE STRATEGY

GETTING STARTED

Manage one part of your operation at a time. Start with what will have the greatest impact on your business. For Jamie's team (and likely yours) that means listing processes.

CHOOSING THE RIGHT TOOLS

- Google Workspace – SOP storage and ease of access
- Slack – internal communication
- Asana – streamlined workflows, especially so agents can view status updates
- Zapier – automation and integration between different applications
- Follow Up Boss – CRM

DEVELOPING SOPS

- For teams, standard practices need to be understood across all departments and roles.
- Each agent cannot have their own way of doing things.
- SOPs always have a context. In establishing a listing transaction process, for example, a key question to ask would be, "What happens from both the agent and client perspective?" You want to ensure that a new agent on the team will provide excellent service based solely on the SOPs, without constant direction from the team.
- Begin by describing the process based on the experience of the personnel closest to the operation.
- Obtain input from the next level of stakeholders. Interview them to collect insights. This not only improves the functionality of the process, but increases buy-in. Be specific as to how the process is divided between team members of various roles.
- Finally, ask, "If leadership is removed from the equation, will clients still receive exceptional service?" The SOPs serve as a reliable guide for team members to consistently deliver high-quality assistance to clients.



THE STRATEGY

LEVELING UP TRAINING

- A robust onboarding process is essential for ensuring new agents and staff do not burden the system. They use Trainual to store training modules and reference pieces.
- They also have a mentorship program that pairs newer agents with more experienced ones.
- Repetition serves to internalize processes. That means agents with low production are more likely to miss process steps. These agents are offered ongoing training to ensure that when they do transact, they will do so according to the book.

MANAGING THE SOPS

- Agent compliance needs to be monitored. If agents are frequently asking questions, then the SOPs either need to be reviewed, clarified, or improved. System breaks, on the other hand, are when a process is not followed. This can be addressed by training.
- During the listing process, the listing coordinator, being closest to the process, ensures they are executed by the book.

Jamie's 3 Action Items **FOR SUCCESS**

1

Figure out what your ultimate goal is and reverse engineer what SOPs are needed, prioritize, and begin building.

2

Start the process from the perspective of a brand new agent with drafting SOPs. Keep it simple, clear, and direct.

3

Keep every department in mind and involved in your process. Plan by department.

6 Things Jamie Will Do **MOVING FORWARD**



1

Establish a process where the seller contributes information about the house for the MLS.

2

Increase seller focused leads with Curaytor.

3

Establish focused lead pillars within the team.

4

Establish an agent listing team.

5

Expand targeted marketing in higher priced neighborhoods to increase average sales price.

6

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

Jamie's TOOLKIT



SEE SUMMIT RESOURCES FOR JAMIE'S TOOLKIT

Listing Process SOP - Agent

The Jamie McMartin Group's listing process for agents.

Listing Process SOP - Leadership

The Jamie McMartin Group's listing process for leadership.

Listing Process SOP - Listing Coordinator

The Jamie McMartin Group's listing process for the listing coordinator role.

Listing Launch Project Trackers

Action items for listing launch found in Asana and Slack.