



V & CO REAL ESTATE TEAM

CASE STUDY

The
Ultimate
Business
Partners.

V & CO'S PROBLEM

Veronica Benavidez is the owner of V&Co., a real estate team on the Central Coast of California. Veronica was a solo Realtor who wanted to do more than just cold call people for listings. Veronica, like a lot of agents, was trained to work the phones hard in order to get business. She spent 20+ hours per week on a dialer cold calling people she did not know in order to get listing meetings. The challenge was that she had a very low conversion rate and when people did agree to meet, a lot of them cancelled the day of the meeting, resulting in lots of frustration and inconsistent income.



V&Co.

OUR SOLUTION AND RESULTS

UBP engaged Veronica in 2018 and we immediately realized that she was very strong on the phone and had a great listing presentation. She was lacking a database and an organic referral network, so we trained her on the Accounts Pyramid TM concept and she resisted. In the beginning, she felt like every hour she was not cold calling was an hour that she was missing out on business. UBP had to hold her highly accountable and to her credit, she was willing to trust the process. We had her re-allocate 5 hours per week of cold calls to working her Accounts Pyramid TM and her database. At first she failed miserably, we heard all the excuse. "I don't know what to say.", "I'd rather work the dialer." "I havent called my past clients since we closed.", "What do I say to a Trust Attorney that will make them refer me?" Her mindset was that of a prisoner, not of a prize. Once we helped her overcome that, she caught fire. She started landing appointments with business professionals all over town and they started referring her. And she was able to refer her past clients to them.

Veronica began resisting the process because she thought she needed to cold call all the time. She had been exposed to scripts from other top trainers and she thought that was the only way. Now, she has an Accounts Pyramid TM that generates a steady flow of referrals every month, including a local wholesaler that uses her exclusively. Once Veronica experienced success with her Accounts Pyramid TM, she was all in on the coaching systems, including her monthly P & L.

Since 2020 Veronica has been monitoring her monthly expenses, pays herself a salary and monthly distributions, and pays her quarterlies. Over the last 3 years, Veronica has purchased two properties using traditional financing and is enjoying passive income.

Veronica is truly running a business.



SUMMARY

PRE-ULTIMATE BUSINESS PARTNERS

100% COLD CALLS, 20 HOURS PER WEEK



LOW CONVERSION RATE, LOW MEETING RATE, LOTS OF PEOPLE WHO SCHEDULED WITH HER CANCELLED THE DAY OF THE APPOINTMENT.



DID NOT ENGAGE HER DATABASE OF FRIENDS, FAMILY AND PAST CLIENTS.



POST-ULTIMATE BUSINESS PARTNERS

5 HOURS PER WEEK TAKING CARE OF HER DATABASE OF PAST CLIENTS. HAS A BIRTHDAY PROGRAM, ANNIVERSARY PROGRAM, MONTHLY AND QUARTERLY CHECK INS AND A VIP LIST. ALL THESE ACTIVITIES GENERATE REFERRALS.



STILL PROSPECTS, HAS INCREASED HER CONVERSION RATE ON JUST LISTED, JUST SOLD, AND OPEN HOUSES BY STUDYING AND PRACTICING SCRIPTS WITH THE UBP TEAM.



BUILT UP AN ACCOUNTS PYRAMID THAT INCLUDES TRUST ATTORNEYS, FINANCIAL ADVISORS, AND A WHOLESALE COMPANY.

