



# INVEST SLO KELLER WILLIAMS

CASE STUDY

The  
Ultimate  
Business  
Partners.

# INVEST SLO'S PROBLEM

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Invest SLO is owned by Abel Contreras of Keller Williams Realty. Abel was referred to UBP in 2019 because he had the vision to scale going from a solo agent to a large team and adding a commercial sales division. The challenge was that Abel was in his second year of being a Realtor, and he realized that if he wanted to grow right, he needed outside help.



# OUR SOLUTION AND RESULTS

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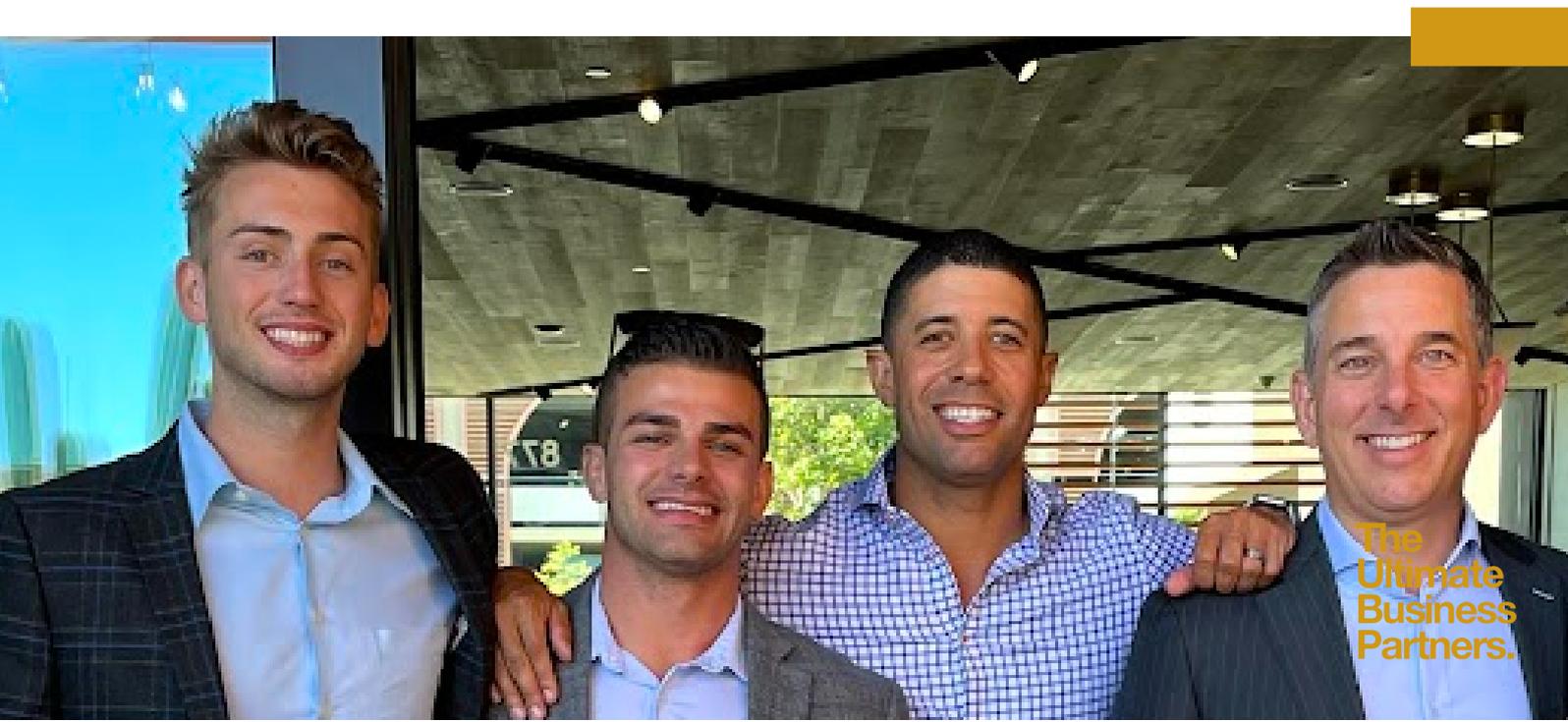
UBP had Abel write down his vision, as well as detail his ideal day, his ideal client, his ideal office, etc. Detail matters when you are beginning to scale, and we had Able put a lot of thought into what he really wanted to build. Then we created Roles and Responsibilities that outlined each position and the skills needed to be successful on the team. Once we had that in place, it became almost effortless to find the right people. We helped Able build his team and his callers and continue to create efficiencies around his production.

Within two years Able has built a team of 9 and his production has increased from \$9 million to over \$24 million. Even more impressive is that in Q4 of 2022 he has 13 active listings for over \$13 million and is averaging 3 new listings per week.

The commercial division is also up and running and Abel has been part of a \$7 million dollar apartment sale and a \$5.7 million dollar hotel sale.

UBP has engaged the entire Invest SLO team in bi-weekly group coaching and continues to meet with Able weekly.

A big part of Abel's success is that he is 100% committed to practicing his scripts. Able spends at least 3 hours per day on the phone and he requests this of his team as well. He is able to track everyone's activities and they work together to get better every week. Able has also implemented the Accounts Pyramid TM and is building up a large network of investors and referral partners so that he is able to get a steady flow of referrals, no matter what the market conditions are.



# SUMMARY

## PRE-ULTIMATE BUSINESS PARTNERS

SOLO AGENT	✗
NO MONTHLY P&L AND NO MONTHLY DISTRIBUTIONS, NO IDEA OF OVERHEAD	✗
ROI ON ACTIVITIES NOT TRACKED	✗
TEAM'S ROLES AND RESPONSIBILITIES WERE NOT WRITTEN DOWN OR THOUGHT OUT	✗
METRICS DID NOT EXIST	✗
\$9 MILLION	✗
NO B2B RELATIONSHIPS, NO ORGANIC REFERRAL NETWORK	✗
100% COLD CALLS TO GET LEADS	✗

## WITH THE ULTIMATE BUSINESS PARTNERS

TEAM OF 9	✓
MONTHLY P&L WITH DISTRIBUTIONS	✓
ROI ON ACTIVITIES SO THAT IT BECOMES CLEAR ON WHATS WORKING AND WHATS NOT WORKING	✓
ONE-PAGE TEAM VISION SO THAT EVERYONE KNOWS WHAT THEIR ROLE IS ON THE TEAM	✓
METRICS ARE TRACKED	✓
\$24 MILLION, AVERAGING 3 NEW LISTINGS PER WEEK IN Q4 2022	✓
GROWING ACCOUNTS PYRAMID WITH A PLAN FOR CONTINUED GROWTH.	✓
GETS LEADS, REFERRALS, AND INVESTORS COMING BACK.	✓



**“UBP HAS HELPED ME VIEW REAL ESTATE AS A BUSINESS. WITH THEIR HELP I HAVE BEEN ABLE TO KEEP MY FINANCES ORGANIZED, PURCHASE FOUR PROPERTIES ON THE CENTRAL COAST, AND BUILD A TEAM. ITS HARD WORK AND ITS NOT PERFECT, HOWEVER I KNOW THAT THEN THEM ON MY SIDE I WILL GET THERE SOONER THAN TRYING TO FIGURE IT OUT ON MY OWN.” - ABLE CONTRERAS**