

## **Case Studies**

### **CASE STUDY #1**

#### **Social Media Helps to Increase Sales by \$1 Million for Real Estate Company**

### **About Coldwell Banker Premier Properties**

Coldwell Banker Premier Properties/Premier Homes is an award-winning, full-service real estate company, serving Virginia, West Virginia, Maryland, Pennsylvania, and Washington DC. They endeavor to exceed your expectations with a unique and seamless “one-stop shop” real-estate experience, utilizing in-house relocation, concierge, mortgage, commercial, auction, moving and storage, and settlement services departments.

### **Before working with Katie Lance Consulting**

Before working with Katie Lance, Coldwell Banker Premier Properties used Facebook and Google+ for much of their social media. They also used LinkedIn. However, their LinkedIn use was haphazard according to broker Steve DuBrueler. “In the simplest terms, we didn’t know what we didn’t know,” he states. “We thought we were doing a good job, but weren’t.”

After consulting with Katie, they realized where their efforts were lacking. This was a result of an eye-opening discovery process that she led them through at the beginning.

They did a lot of things for the community that would be great credibility-and-image-boosters, displaying their caring attitude. But, they didn’t share these activities with the community at large, or with their network of brokers and agents through their own, internal platforms.

Katie led them in sharing these activities, and it created meaningful conversations, both online and offline.

## After working with Katie

Under the consultation and direction of Katie Lance, the company formulated a more structured and effective, social-media strategy, along with a well-defined content plan. This formed a type of “Readers Digest” of company news and information, according to Steve.

By understanding exactly how Coldwell Banker Premier Properties wanted to be perceived in the community and also internally within the company, Katie Lance designed a social media program that was tailored to their needs, as opposed to a cookie-cutter, one-size-fits-all approach.

The company is now using Twitter, Facebook, LinkedIn and Google+ more effectively as social-media platforms. Many of the company’s videos are hosted on YouTube and used across various platforms.

## Results

According to Steve, Coldwell Banker Premier Properties had about a 120% increase in growth on Facebook within a 90-day period using Katie’s strategies. Their Twitter following doubled, with an increase in shares and Tweets.

Steve said that he can personally account for the video strategy being responsible for at least a million dollars in sales.

The company plans to continue with a structured, social-media strategy as a result of Katie’s consultation and planning. They are extending it to the individual agents, helping them strengthen their personal platforms. This includes helping the agents develop something akin to a personal, video résumé. That strategy alone has resulted in a significant increase in transactions for several of the agents.

One more benefit of a structured internal, social-media strategy is that the company has developed a feeling of comradery. With agents and

brokers scattered in multiple states, it’s easy to become disjointed. A closed Facebook group gives the brokers and agents a safe place to discuss and share their business challenges. “It’s brought us closer and made us much more unified,” says Steve. “It allows everyone to share and work better as a group.”

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### CASE STUDY #2

#### Custom Real Estate Software Designers Grow Effective, Social Media Presence

## About W+R Studios

Founded in 2008, W&R Studios is a privately held Web software company located in Huntington Beach, California. W+R Studios focuses on creating the next generation of Web-based software solutions for the real-estate industry. By providing a “less is more” approach to software design, elegant user-interfaces, and using the latest in agile programming, W+R Studios’ software applications are at the same time powerful, yet accessible, to everyone.

Co-founders Dan Woolley and Greg Robertson have over 20 years of experience each in developing and marketing software in the real-estate industry.

## Before working with Katie Lance Consulting

When W+R Studios first started using social media, they didn’t have a huge, online presence. According to Frances Brittle, director of marketing at W+R Studios, their efforts were sporadic and disorganized. They felt like social media was something they needed to be a part of but weren’t quite sure what to do with it and had a basic, Facebook page and Twitter account. With each product they designed, a new page was created. But they didn’t use social media for company-branding.

When they realized they needed to share and integrate these various channels to create a better strategy that would help with the company's branding-efforts, they turned to Katie Lance Consulting for assistance.

### After working with Katie

When Katie Lance came on board, she helped them focus and organize their overall strategy, and create their blog content first. Social media was then used to bring the content front-and- center to their targeted market.

Besides developing a structured strategy, Katie provided simple tips that made a huge differences. "Some of her small, quick tips were mind-blowing," states Frances. "They made so much sense. Since she helped us set specific goals, we have definitely increased our following."

Instead of winging it like they did prior to working with Katie Lance Consulting, their social-media efforts became more focused. They developed a content strategy and schedule, created more content on a regular basis and posted more consistently.

They even started a "Fun Friday," where the posts had a more entertaining style to them. This increased engagement and feedback, but it also helped with branding. The posts also gave readers resources they could use.

### Results

The strategies worked well. Before working with Katie Lance, the W+R Studios Facebook page had fewer than 1,000 likes. Their audience has now grown to over 3,300 likes and continues to increase consistently.

Along with adding more, social-media channels, W+R Studios is planning to track their efforts more effectively. Frances feels that as they connect more of the dots with promo codes and similar devices, they will better understand

where their audience comes from and how they, as a software designer, need to interact with them

### Case Studies

#### CASE STUDY #3

#### Real Estate Company Builds a Social Media Community That Encourages Conversations Worldwide

#### About RE/MAX:

From a single office that opened in 1973 in Denver, Colorado, RE/MAX has grown into a global real-estate network of franchisee-owned and -operated offices with more than 100,000 Sales Associates.

Those agents constitute the world's most productive, real-estate sales force. Through their efforts, they've made it possible to say that nobody in the world sells more real estate than RE/MAX.

#### Before working with Katie Lance Consulting

RE/MAX, LLC had used various, social-media outlets for interacting with their consumer and client base. Originally handled by the PR arm of RE/MAX, social media was eventually moved to the marketing team's responsibility. Facebook, Twitter and YouTube were the primary networks used to connect and communicate with brokers, franchisees and potential clients. But there was a major concern about a lack of engagement. Content was being published, but consumer interaction through comments was almost non-existent.

Abby Lee, VP of Media Strategies, understood the benefit of having an outside, third-party consultant come in and evaluate the current, social-media-strategy. An outside consultant would be able to provide unbiased, clear

direction for improving social-media communications that would involve everyone in meaningful conversation.

### After working with Katie

Under the direction of Katie Lance Consulting, RE/MAX, LLC began developing social-media networks into virtual communities. Their current channels were revamped and newer networks were evaluated.

According to Abby, “Real estate is a relationship business. We’ve definitely built better relationships between RE/MAX and our membership, and between our agents and their home buyers and sellers.”

The information provided through social networks ensures that agents have good, relevant content to share with their clients. This allows the company to be more responsive, something lacking before they contacted Katie Lance.

### Results

For RE/MAX, social media has built an online community that brings together stakeholders, agents and consumers from all over the world. It provides a platform that fosters the communication and conversation that is vital to building strong business relationships.

## Case Studies

### CASE STUDY #4

#### A Wine Lover’s Passion Sparks a Business Idea, a Mobile App and a Marketplace Brand

### About Carla McKay and Crushed™

After more than 20 years in business development and sales positions for big corporations and startups, coupled with eight years of toiling on the weekends

for a winery in Sonoma, California, Carla McKay made the leap to the wine industry by creating the Drink Chick consulting firm in 2011. In 2012, she created Crushed.com and the Crushed wine app to power social sharing of wine, which launched in iTunes in December 2013.

Carla is a graduate of the Culinary Institute of America, Greystone School of Wine and a Certified Wine Professional. As an avid bicyclist, you may catch sight of Carla toting wine on her

bike to clients and friends throughout the Bay Area.

### Before working with Katie Lance Consulting

When Carla started Crushed, she knew she needed a vibrant, social presence. She wanted an effective social-strategy because her business model was based on social sharing. Putting out the word on Facebook that she was looking for a social-media strategist, she connected with Katie Lance.

Carla mentioned that the Crushed social-media strategy started with her and her partner throwing posts up “haphazardly.” They targeted what they thought was their ideal market, millennials. However, the people most interested in their brand were actually women in their 30s and 40s. Katie was able to help steer their efforts towards that group, increasing the value of the brand.

Carla’s idea for the app was to provide a method for people to share their wine experiences with others in an easy, real-time way. The main strategy for that was to get people to the Crushed website and get them interested in the content there. As a result, the readers would download the social-sharing app.

### After working with Katie

Carla hired Katie Lance several months before the app was launched. Katie helped them build a buzz campaign to get people interested in the app before

it actually launched. They wanted the excitement and anticipation to build. A launch party was also hosted when the app was released.

After the launch, Katie put together some press releases and other articles to bring more media attention to Crushed™ and the wine-sharing app.

## Results

Because of the advance publicity and launch party, the Crushed app was successful from the start. It was downloaded several thousand times during the first few weeks. The press releases brought several thousand more.

One good takeaway from the experience, according to Carla, is that you need to work hard to be successful, even if you have the best app in the world. Until publicized effectively and people discover that it's out there, any app stands little chance of success.

While Katie got the app and company off to a good start, she also trained the staff in the use of social-media marketing. She was able to get them to the point where the strategies she helped design could be carried out in-house.

Crushed now uses Facebook, Twitter, Instagram, Tumblr and their website in conjunction with their app to promote their brand.

Carla feels that Katie was instrumental in taking Crushed from an idea to an awesome brand in the marketplace. The strategies she designed are still being used by the Crushed team to promote and improve their brand.

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### CASE STUDY #5

#### Katie Lance Helps a Startup Build Raving Fans Through Social Media

### About Cartavi

In late 2009, Glenn Shimkus and Paul Koziarz set out to develop a highly-mobile app that aimed to remove the friction that comes with managing real estate transactions the old way. The company they created was called Cartavi. And its technology provided real estate professionals with an easier and more secure way to manage, share and sign documents digitally from anywhere, anytime, on any device.

Cartavi eventually became the leading, mobile and collaborative digital transaction management solution for real estate professionals in the U.S. and Canada to help them, “streamline the transaction process and improve the home-purchase experience for consumers.” And Katie Lance was a key part of their success...

### Before working with Katie Lance Consulting

During the early days of the startup, Glenn and Paul focused primarily on building their product and customer base. And as they began to develop business relationships and industry expertise, they realized that social media would be a great way to access their target market and build brand awareness.

Their audience was spending significant time on sites like Facebook, not only socializing, but searching for, and sharing, information about real estate technology. However, as an early-stage business with limited internal resources, developing and executing a social media strategy to effectively promote their business to real estate professionals was a marketing function that they decided to outsource.

They conducted research to find an experienced marketing professional who had both the integrity and expertise to help them develop a social media

strategy that aligned with their brand. After recognizing Katie Lance as a key influencer in social media within the real estate industry, hearing her speak and meeting her at several networking events, they formed a partnership with Katie as a consultant in 2012.

Prior to partnering with Katie Lance Consulting, Cartavi's social media presence was basically managed through a Facebook business page and Twitter handle but lacked the interaction and following that the company desired. But with Katie now on board, that was about to change.

### After working with Katie

Katie started the process by conducting a full audit of Cartavi's social media reach and presence. This gave the team a better sense of their current situation and the best way to move forward. Then, they created a plan relative to the type of content they wanted to share (when, where, and how) and put their social media strategy to work.

The Cartavi team began posting more relevant information, and responding to comments, feedback, and support inquiries in real-time. Becoming more present online through social media also allowed the Cartavi Co-founders to engage directly with customers and prospects rather than just posting information. And their audience appreciated their personal approach, accessibility, and the fact that there were real people at Cartavi sharing their story as the company grew. Followers began to increase, and Cartavi soon realized the value of what they were doing, not only from a marketing perspective, but also from the connections they were creating.

"Listening to and collaborating with our customers was essential to building our products, our services, and our brand," said Paul Koziarz, co-founder and former chief marketing officer of Cartavi. "Social media allowed us to further share our story, and gave us a more meaningful way to inspire, inform and interact with real estate professionals."

Building on the success of their new, social media efforts, Katie and Paul decided to develop an online community to better connect their growing family of users and supporters. The community, called "Friends and Family of Cartavi," was a private Facebook group designed specifically for an increasing number of real estate professionals who were interested in, or already using, their products.

The creation of the Facebook group opened the door to real conversations where people openly talked about the product and shared their input with the Cartavi team as well as other members. Over time, several product enhancements were developed in response to the feedback that was being shared through the online conversations. And as the community grew, several, highly-active members became evangelists or "ambassadors" who enthusiastically helped promote the brand.

"While we didn't set out to develop an ambassador program at the time, that is basically what happened as a result of becoming more engaged with our customers and followers through social media," said Koziarz "We were very fortunate to earn the trust and support of so many great real estate professionals who believed in what we were doing and who were more than willing to share their Cartavi experience with others."

### Results

Through the partnership with Katie Lance Consulting, Cartavi learned how to better leverage social media to improve their product by engaging with their audience and grow their brand by turning followers into raving fans. Their marketing campaigns reached record levels and generated conversations that got real estate professionals talking about the brand online. In fact, Paul estimates that their Facebook following grew from a few hundred to nearly 5,000 in a matter of months while working with Katie Lance.

Katie played a vital role in helping Cartavi develop its social media strategy and improve audience engagement. Her expertise and deep knowledge of

the real estate industry proved to be invaluable as Cartavi reached a significant milestone as a company.

In May 2013, Cartavi was acquired by DocuSign, the global standard for eSignature and digital transaction management. The acquisition followed an 18-month strategic partnership, during which the companies jointly developed solutions for the real estate industry. Through the merger, Cartavi became part of the DocuSign brand. And as the company and its products were being integrated into DocuSign's system, so were the social media programs and communities that Cartavi had created. Katie provided continued support to Cartavi throughout the integration process and worked with DocuSign's internal marketing team to help make the transition as seamless as possible for Cartavi's customers and followers online.

"Katie Lance is one of the most well-recognized and respected marketing professionals in the real estate industry. Her passion for social media and technology, and her vast experience in helping businesses grow their brands are evident from the moment you meet her," states Koziarz. "It was a pleasure working with Katie, and I would highly recommend her to anyone in need of a trusted social media expert."

## Case Studies

### CASE STUDY #6

#### Mortgage Company Increases Their Online Presence and Thought Leadership with an Effective Social-Media Strategy

### About RPM Mortgage, Inc.

In 1995, Rob and Tracey Hirt asked one another "what if...?" and were inspired to create a mortgage business where the loan advisors were the primary customer and sales and marketing laid the foundation for success. It was a concept unlike any other.

The result of their vision and hard work was RPM Mortgage, Inc., an independently-owned and operated residential mortgage-lending company with more than 650 loan advisors and employees who have been enabled to provide better results for their customers.

### Before working with Katie Lance Consulting

RPM's social-media presence was "anemic," according to Jill Sonderby, SVP of Marketing and Communications. They knew they needed a social-media presence but had no actual strategy to implement it.

According to Jill, "someone set up our profiles for Facebook, Twitter and LinkedIn, but never did much with them. As a result, they were very quiet with no real interaction going on with anyone."

To change that, they hired Katie Lance Consulting to help them improve their social presence by creating an effective social-media strategy.

### After working with Katie

With Katie onboard, RPM developed a social-media strategy to increase their exposure to the different audiences with whom they needed to interact.

In the beginning, Katie was not just a consultant – she managed the content and executed much of the social-media content publishing. With Katie Lance's help, Jill made quality decisions about what kind of content was needed and who it should target.

Katie also helped RPM's loan advisors set up their individual profiles and provided tips and advice to make their profiles more effective. Additionally, she held webinars and advised them on the best technology solutions for their programs.

As their collaboration progressed, Jill stated that there was a need to hire in-house staff to handle the expanding, social-media strategy. Katie worked with her to develop a job description and assisted in the in-house staff training.

Under Katie's guidance, RPM was able to expand their social-media efforts to include social-media platforms that would help support the loan advisors that worked within the company.

## Results

As a result of Katie's planning and training, RPM was able to meet several of their goals. First, they expanded their presence in front of their targeted market and let them see what mortgage solutions they had to offer.

They were also able to do a better job of recruiting loan advisors, particularly those with a more professional LinkedIn presence.

When it was necessary to ensure compliance with the marketing and advertising standards, Katie's knowledge of the industry helped. Both the company and the loan advisors were protected because they used the platforms and content that ensured compliance.

Some of the benefits that RPM gained under Katie Lance's guidance were:

- Better search results without having to pay for Google AdWords and other paid search-programs.
- Improved relationships with real-estate professionals who worked with the company's mortgage professionals.
- More exposure online and via mobile using the social-media solutions Katie helped build.

A company blog was also developed to increase their online presence. The blog includes content written by company personnel and industry leaders. This helps promote RPM as a thought leader in the mortgage business.

Katie's ability to view the project from both the company's and the customer's perspective provided a balanced understanding of what was necessary to improve RPM's social presence in the marketplace.