



CASE STUDY COMPASS

Why Compass Chose Prialto

Compass real estate agents are offered a wide range of support services and tools to help them be more productive, including virtual assistants. Compass chose Prialto to be their nation-wide provider of virtual assistants because of Prialto's many years of experience as a managed service and its ability to scale in a systematic manner. In particular, Compass was looking to partner with a company that could create a "plug-and-play" offering covering processes such as sales and marketing, and transaction support. After a structured pilot program for Compass agents in 3 cities across the country, Prialto became the clear winner to roll out the Compass Virtual Assistant program for top producers at this fast-growing brokerage. The Compass-Prialto partnership has evolved to be a core support offering for Compass agents.

About Compass

Compass is building the first modern real estate platform, pairing the industry's top talent with technology to make the search and sell experience intelligent and seamless. With more than 12,000 agents serving vibrant communities across the U.S., Compass is now the country's largest independent real estate brokerage.

"My PA has been instrumental in helping me across so many parts of my business -- like updating and consolidating my contacts, research, list building, calling on expired listings, CRM support, and client tracking."

- Karen Gould, SF Compass Realtor

Processes and Tasks

Prialto assistants are proficient and knowledgeable in all the Compass-related tools and software needed to run an agent's business. Agents can hand off their day-to-day administrative and marketing work in order to spend more time meeting with clients, showing homes, and building their business.



1 Sales & Marketing Support

Real estate assistants tackle the research, set up, and follow-up for marketing campaigns so that agents can focus on creating compelling content.

2 CRM Support & Maintenance

VAs keep agents' contacts organized in their CRM so they never struggle to find someone's information.

3 Listing Support/Management




Assistants can help post new listings, update existing ones, and follow-up with expiring ones through MLS and other listing platforms their agents use.

4 Documentation & Transaction Support

VAs can set up documents in their document management software, schedule meetings, and follow-up with relevant parties to ensure the timely submission of documents.

Keys to Success

Compass agents succeed with Prialto because they committed to the following best practices:

-  **Build and maintain a working relationship.**
Once they had the initial foundation of their relationship established, they maintained it with a basic cadence of direct and genuine communication.
-  **Leverage their Prialto Engagement Manager.**
In addition to their dedicated assistant, agents are assigned a dedicated Engagement Manager (EM). The EM's job is to provide a management layer and ensure agents have a smooth experience.
-  **Don't be afraid to train/coach.**
Keeping an open line of candid communication with their assistants and Engagement Managers was key to maintaining successful relationships.



Results



Agents have come to depend on their VAs for a growing number of processes and tasks that can be offloaded



Compass & Prialto together have established a “plug and play” solution for delivering trained and productive assistants in a scalable way



Prialto is well positioned to drive productivity across many processes and tasks within real estate

40+
Agents

40+ agents
successfully
on-boarded for pilot

100s
of Posts

Hundreds of
social media collateral
created

9.3
Hours

9.3 hours saved per
agent, per week

Prialto Amplifies Your Team



Time

Spend more time in more valuable ways. **Increase Sales Conversations**



Intelligence

Leverage data to target prospects and nurture relationships.

Optimize reports for decision-making



Spirit

Make travel & time more impactful. Provide freedom from late nights tabulating expenses. **Support work life balance**



Sales Process

Deliver Fortune 500 execution at SMB prices. Leverage CRM expertise and best practices. **Provide ongoing training and drive adoption**



Management Execution

Deliver quality data for better decisions. Enforce consistent follow through.

Measure effectiveness



+1-888-873-6101



sales@prialto.com



www.prialto.com