



Real Estate Consulting for Environmentally Conscious
Planning, Design & Sustainable Development

Real Estate Consulting Business Plan

Accredited Consultant in Real Estate® Designation Program





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Strategic Focus

There are a variety of opportunities in which real estate consulting would be of great benefit to our clients. In my sphere of influence I meet people all the time who could use real estate consulting services.

Currently my main client focus is on real estate investors. Our company offers residential & commercial planning, architectural design and development services. We are developers/designers/planners/marketers for a variety of residential & commercial projects.

We are also branching out into the general real estate services market, not just for our own development projects but also for other client projects. Hence my excitement in learning more about SWS and the ACRE program and becoming certified. These training/learning programs are in alignment with our business philosophy.

Who Will I Serve

My strategic focus currently will revolve around the following client types:

Real Estate Potential Client Types:

- 1. Real Estate investors** who want professional, complete unbiased market evaluation
- 2. Owners who rent** their properties & need advice & services (functionary & fiduciary)
- 3. Homeowners** who are investigating remodeling, expanding their property or possibly selling
- 4. Buyers** who are investigating an area for possible relocation
- 5. Foreclosure & Short-Sale clients**
- 6. All my previous clients & potential clients**
- 7. FSBO** who may need help in fiduciary role
- 8. Buyers & sellers** who want alternatives with lower fees for less risk
- 9. Buyers** who have found their home & sellers who have found a buyer who need consulting services for negotiating a contract and troubleshooting the transaction through closing for either side or both.
- 10. Sellers & Buyers** who are considering refinancing vs buying/selling
- 11. Clients** who want to have options other than the traditional real estate model.





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What Services I Will Offer

The services I offer will vary depending on the individual client needs. Some of the services will overlap, some are specific to the client “type”.

Below are the services I will offer to the client types (note my main focus is intended to work with real estate investors & development partners, however, I would like to open up my sphere of influence to other client types):

1. Real Estate Investors -

- Preliminary Market Analysis of properties (basic CMA, no previewing)
- Detailed Market Analysis of properties (comprehensive CMA, previewing included)
 - Land Planning, Land Analysis, Land Acquisition Studies
 - Feasibility Studies & Marketing Strategies
 - Market analysis of properties (estimate of built/renovated market value)
 - Cost analysis for construction/renovations
 - Site Planning & Topographical Studies
 - Environmentally conscious opportunities: renewable energy solutions
 - Provide updated market activity reports during the construction/renovation
- Project Programming (Architecture Studio)
- Project Design (Architecture Studio)
- Construction Supervision (Architecture Studio)
- Listing property for sale
- Marketing completed project with optional fee structure

Purchase Agreements:

- Preparation and explanation of purchase agreement and disclosures
- Presentation and negotiation of purchase agreement
- Monitor dates and deadlines from Contract-to-Closing
- Trouble-shoot during Contract-to-Closing period
- Review closing figures
- Attend closing

2. Owners who rent their properties

- **Consulting services** (functionary & fiduciary)
 - Market analysis
 - Marketing strategy
 - Contract preparation
 - Tenant background check
 - Consulting services regarding owner/tenant issues



3. Homeowners who are investigating remodeling, expanding their property or possibly selling

- Consulting service (functionary)
 - Market analysis
 - Planning & design services (Architecture Studio)
 - Cost analysis for construction/renovations
 - Provide updated market activity reports during the construction/renovation
 - Listing property for sale with options

4. Buyers who are investigating an area for possible relocation

- Consulting services (functionary & fiduciary)
 - Market analysis: Detailed Market Analysis of properties
 - Neighborhood analysis
 - Market tour

5. Foreclosure & Short Sale clients

- Consulting services (functionary & fiduciary)
- Basic MLS Package with
 - Price control setting & price adjustments
 - CMA preparation & update CMA every 3 months
 - Title/Lien reports
 - Inspections & cost analysis for repairs

6. All my Previous Clients & Potential Clients

- Consulting service (functionary & fiduciary)

7. FSBO who may need help in fiduciary role

- Market Analysis (basic CMA, no previewing)
- Market Analysis (comprehensive CMA, previewing included)
- Consultation on improving marketability of home
- Assistance preparing the purchase agreement and disclosures, and explaining it to both parties
- Contract-to-Closing Assistance (no agency), including: order and review title work, monitor dates and deadlines, help negotiate inspection, attend appraisal, set closing, review closing figures, attend closing, general trouble-shooting

8. Buyers & Sellers who want alternatives with less fees for less risk

- Traditional Buyers & sellers of contingent commission with options for services paid by Package choices or on an hourly rate



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9. **Buyers** who have found their home & sellers who have found a buyer offering help with negotiating a contract and troubleshooting the transaction to close for either side or both.
 - Fiduciary services.
10. **Sellers & Buyers** who are considering refinancing vs buying/selling
 - Consulting services based on package options & hourly consulting

Compensation Model

I will offer 4 Real Estate Consulting packages with optional additions.

I will also offer services for hire at an hourly rate. Rebates are also an option in exchange for commission.

How Will I Charge For Services

Below are some “package” options for **General Real Estate Services**:

Traditional Seller Package: Contingent Commission % based on selling price.

- **Market Analysis** (basic CMA, no previewing)
- **Comprehensive Market Analysis** (comprehensive CMA, previewing included)
- **MLS Listing**
- **Provide Yard Signs/Lock Box**
- **Consultation on improving marketability of home**
- **Take & Edit Digital Photos**
- **Prepare Feature Sheet single sided print 30, give CD for client to print additional**
- **Web Pages on my real estate site public & private client area**
- **Follow up feedback for showings in Private blog area**
- **Schedule Showings/Show Unassisted Buyers**
- **Social Media Marketing: Facebook, Twitter, YouTube, Blogging**
- **Room Measurements & floor plans**
- **Prepare an e-neighborhood report**
- **Prepare For Open House**
- **Write Classified ads/Submit up to 8 open houses**
- **Hold 8 open houses**
- **Negotiation of Offer**
- **Attend home inspection**





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- **Preparing the purchase agreement and disclosures, and explaining it to both parties**
- **Transaction Coordination-Contract to Close**
- **Attend closing**

Basic MLS Service Seller Package 1:

- **Market Analysis** (basic CMA, no previewing)
- **MLS Listing**
- **Provide Yard Signs/Lock Box** (for rental fee, must be returned)
- **Schedule Showings/Show Unassisted Buyers**
- **Negotiation of Offer***
- **Transaction Coordination-Contract to Close*****

Pricing consulting, negotiation of offers & troubleshoot the transaction.

*****First Buyer Only** – all negotiations & transaction coordination time on subsequent offers must be paid for by the hour at the Fiduciary rate.

Upgraded Service Seller Package 2:

Everything in Basic MLS Package PLUS:

- **Market Analysis** (comprehensive CMA, previewing included)
- **Consultation** on improving marketability of home
- Take & Edit Digital Photos
- Prepare Feature Sheet single sided print 30, give CD for client to print additional
- **Prepare Web Pages Public & Private client area**
- Follow up feedback for showings in Private blog area
- **Assistance preparing the purchase agreement and disclosures, and explaining it to both parties** (no agency)

Incorporates fiduciary counsel & adds in some functionary tasks.



Deluxe Service Seller Package 3

Everything in the **Upgrade Service Package PLUS:**

- **Social Media Marketing:** Facebook, Twitter, YouTube, Blogging
- Room Measurements & floor plans
- **Prepare an e-neighborhood** report
- Prepare Yard Box/Open House Feature Sheets print 30 double sided
- Write Classified ads/Submit up to 2 open houses
- Hold 4 open houses
- Attend home inspection
- Attend closing

Other Options with additional fees:

- Staging home
- Pre-Market Cleaning Home
- Additional open houses
- Virtual home video

How Much Will I Charge For Services

MVHR: \$ XX - \$ XX (Functionary/Administrative Services)
MVHR: \$ XX - \$ XXX (Fiduciary)

Investors

Investor:

- Non-refundable consulting fee retainer upfront, paid based on hourly rate & scope of services needed.
- If buying property, retainer fee is applied to full rebate for contingent commission.
- If discounted contingent commission, then partial rebate on retainer, depending on the commission %.

Development Partners:

- Discounted contingent commission plus marketing costs deducted from selling price. Other options available, depending on needs.

Traditional Seller Package

Listing Contingent Commission: X% seller agent & X% buyer agent



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Sellers Shared Risk

Sellers Shared Risk Upfront Fee: \$X,XXX
Listing Commission: X.X%
Buyer Agent: X.X%
Package 2, 3, or 4

FSBO & Sellers

Basic MLS Seller Service Package 1:

Nonrefundable Up-Front Fee: \$XXX

Pricing consulting, negotiation of offers & troubleshoot the transaction.

*****First Buyer Only** – all negotiations & transaction coordination time on subsequent offers must be paid for by the hour.

Upgraded Seller Service Package 2:

Non refundable Up-Front Fee: \$X,XXX

*****First Buyer Only** – all negotiations & transaction coordination time on subsequent offers must be paid for by the hour.

Deluxe Seller Service Package 3:

Non refundable Up-Front Fee: \$X,XXX

*****First Buyer Only** – all negotiations & transaction coordination time on subsequent offers must be paid for by the hour.

Buyers Who Want to Share Risk with Me:

Non refundable Up-Front fee: \$X,XXX

MVHR: \$ XX - \$ XX (Functionary/Administrative Services)

MVHR: \$ XX - \$ XXX (Fiduciary)

Portion of Contingent Commission on Closing: X.X%

Portion of Contingent Commission Rebated after Closing: .X%

Owners Who Rent Their Property

Hourly rate see above, depending Functionary or Fiduciary services:

MVHR: \$ XX - \$ XX (Functionary/Administrative Services)

MVHR: \$ XX - \$ XXX (Fiduciary)





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Owners with Expired Listings

Consulting Services:

MVHR: \$ XX - \$ XX (Functionary/Administrative Services)

MVHR: \$ XX - \$ XXX (Fiduciary)

Or: Upfront Flat Fee: \$ XXX

Will apply \$XXX/2 of the payment if they list with me.

Or: Portion of Contingent Commission on Closing: X.X%

Portion of Contingent Commission Rebated after Closing: .X%

Or: Package Options 1,2,3,4

Marketing Plan

Marketing my services will be key to my success. I believe in the real estate consulting model, feel confident in the options I can offer to my clients & I am responsive to serving my clients' needs.

How Will I Promote My Consulting Services

- Make announcements to my sphere of influence etc.
- Add the ACRE Logo to my email signature
- Add ACRE Logo to my websites, social media networks & blog
- Add Consulting services content to my websites & client project websites
- Create marketing materials with consulting service offerings with ACRE logo: brochures, flyers, business card
- Blog about consulting services & post to social media
- Add consulting services in my listings
- Act on opportunities that exist everywhere to talk about real estate consulting services

