

**NARPM™**  
**BROKER/OWNER**  
*Conference & Expo*

March 28-30  
Hyatt Regency  
Hill Country  
San Antonio, TX

Case Study on Performance  
Presented by: Trevor Garrett, RMP®

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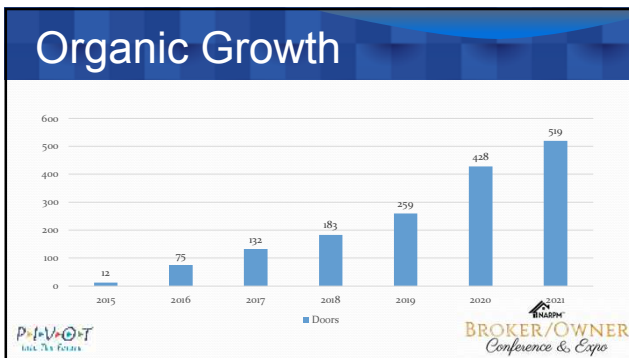
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<b>EMPLOYEE</b> <b>E</b> You Have a Job	<b>BUSINESS OWNER</b> <b>B</b> You Own a System & People Work for You
<b>SELF EMPLOYED</b> <b>S</b> You Own a Job	<b>INVESTOR</b> <b>I</b> Money Works for You

PIVOT REALTY PARTNERS

BROKER/OWNER Conference & Expo

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## Version 1.0

- It's me. Just me.
- No processes. No systems. No policies.
- Fake it until I make it
- Tech Stack: Appfolio & Gmail
- Lasted about 9 months until about 50 properties
- Is this going to work?



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## Version 1.0



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## Version 2.0

- From about 50 properties to 175 properties
- Added 1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup> employees
- Created policies
- Everyone at the company knows everything that's going on
- Building a business is HARD



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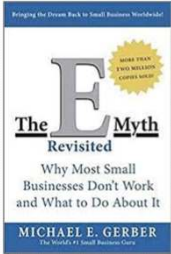
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## Version 2.0



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## Version 3.0

- From about 175 properties to 400 properties
- Growth: Added BDM and Marketing
- Departmentalize
  - Leasing; Tenant Relations; Owner Relations
- Tried (& somewhat failed) using Remote Assistants
- Implemented Traction
- This is fun

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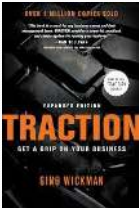
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## Version 3.0

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## Version 3.0 Tech Stack

- Leadsimple (Marketing CRM)
- PMW (Website)
- Helpscout (Ticketing System)
- E-mail converted from Google to Microsoft
- Tenant Turner (Self-showings)

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## Version 4.0

- From about 400 properties to present
- Process Automation!!!!!!!!!!
- Remote Assistants!!!!!!!!!! (learned how to do it right)
- Open 7:30 AM to 7:30 PM M-F; 9 to 5 Sat & Sun
- Cost to manage each property dropping significantly
- Future is clear – unlimited upside

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## Version 4.0 Staffing

- Sales & Marketing: VP/General Manager (Outside Sales); Inside Sales (USA); Assistant (Mexico RA)
- Operations: VP of Operations (USA); 2 Portfolio Mangers (USA)
- Resident Relations: Operations Manager (USA)
  - First Impressions (Leasing): 3 Coordinators (Mexico RA)
  - Tenant Relations: 3 Coordinators (1 USA; 2 Mexico RA)
- Maintenance: Manager (USA)
  - Property Standards Coord (USA); 2 Coordinators (Mexico RA)

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## The Future

- Setup for growth of 20+ units per month & geographical expansion
- Investing heavily in sales & marketing
- Strong belief in death of middle market PM companies in the next decade.
  - Small 50 to 150 property companies will succeed
  - Larger 800+ property companies will succeed

P-I-V-O-T  
THE FUTURE

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