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.

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.

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 as a team, they work together to get better every week. Able has also implemented the Accounts Pyramid and is building up a large network of investors and referral partners so that he is able to get a steady flow of referrals.

| Before UBP | With UBP |
| --- | --- |
| Solo agent | Team of 9 |
| No monthly P&L and no monthly distributions, no idea of overhead | Monthly P&L with distributions |
| ROI on activities not tracked | ROI on activities so that it becomes clear on whats working and whats not working |
| Team’s roles and responsibilities were not written down or thought out | One-page team vision so that everyone knows what their role is on the team |
| Metrics did not exist | Metrics are tracked |
| $9 million | $24 million, averaging 3 new listings per week in Q4 2022 |
| No B2B relationships, no organic referral network | Growing Accounts Pyramid with a plan for continued growth. |
| 100% cold calls to get leads | Gets leads, referrals, and investors coming back. |