FINANCE OPERATIONS RESEARCH EVENT

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Herriman High School

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I. EXECUTIVE SUMMARY

— Description of Business —

Manning and Clarke Realty (M&C) is a family-owned real estate business in Draper, Utah. Stacie Manning and Makenzie Clarke earn a 3% commission from each deal, which they split between themselves. M&C has an average of 5 monthly clients in the low season (November through April) and 8 in the high season (May through October), closing 1-3 deals per month. M&C Realty works with clients with budgets anywhere from $500K to $1 million. It currently operates in 9 different counties in Utah, specializing in Daybreak and the surrounding developments. Daybreak is a community owned by The Larry H. Miller Company that focuses on luxury homes and offers other benefits, including pools, parks, and activities. Daybreak holds potential for the luxury sector, but M&C has been unable to take full advantage of it.

Figure 1: Stacie Manning and Makenzie Clarke

Current AI Usage

Manning and Clarke Realty uses RealScout to streamline operations and client engagement through predictive analytics, improving client satisfaction and experience.

— Research —

Our team created a plan based on four research goals: **identify** current AI use, **determine** AI applications, **evaluate** existing procedures, and **analyze** findings.

Primary Research

-Interviews with Stacie Manning and Makenzie Clarke
-Spoke with Paolo Visentin of Visentin Real Estate
-Interview with Jimmy Perry of Perry Real Estate
-Met with Alyssa Rutsey of HERE Technologies
-Homeowner Survey on the Daybreak Facebook Page

Secondary Research

-Four Websites (The Motley Fool, Ascendix, National Association of Realtors, ACRE)
-Six AI Companies (CLOZE, Roof AI, Lately AI, Mailchimp, Monday AI, Likely AI, CubiCasa)

— Findings and Conclusions —

1

Finding: Without a clearly defined target market, M&C is missing opportunities to attract high-value clients and implement effective, tailored marketing campaigns.

Conclusion: Due to time constraints, serving low-quality leads limits M&C's ability to work with high-quality clients. By creating a defined target market, M&C can attract and retain higher-quality leads by using the AI platforms proposed in our plan.

2

Finding: M&C's current marketing efforts, including community newsletters, a banner at Herriman High, and an Instagram account, are not effectively generating substantial leads.

Conclusions: M&C can use CLOZE to improve its marketing efforts. Using CLOZE's marketing templates, M&C can automate advertisements and social media posts to create a brand image catering to a luxury clientele.

3 **Finding:** Without a structured lead management system, M&C wastes time on referral-based leads received via email, text, and social media that provide little financial return.

Conclusion: CLOZE will allow M&C to capture high-quality leads that align with its new target market, allowing it to spend its time and resources on clients who provide higher financial returns.

4 **Finding:** Though it describes itself as a luxury service, M&C offers no additional luxury benefits, failing to stand out from its competitors and attract high-value clients.

Conclusion: M&C can use CubiCasa's 3D virtual home plans and virtual tools to gain an advantage over competitors and attract higher-income clients looking for an elevated experience.

Objectives of Strategic Plan

Objective 1

Capture and Manage Leads

CLOZE

Our first objective aims to attract and manage high quality leads. CLOZE's CRM will improve marketing efforts and align leads with M&C's target market. Our team aims to increase the number of deals closed within the target market and decrease customer acquisition cost (CAC).

Objective 2

Create Luxury Brand

CubiCasa

Our second objective aims to create M&C's image as a luxury service using AI-generated 3D floor plans and virtual tours to give M&C a competitive advantage over other real estate agents in the market, especially for out-of-state clients, increasing customer satisfaction, measured by Net Promoter Score (NPS).

3-Step Strategic Plan

**1** **Refine Target Market**

Our team will create M&C's new target market, which will include individuals with a budget above $1.2 million relocating from out of state to Salt Lake County, primarily Daybreak (a wealthy planned community owned by Larry H. Miller Company). M&C will target families looking for larger houses who value luxury and outdoor activities.

2 **Implement Marketing Strategies and Filter Leads**

M&C will use CLOZE to manage marketing and filter leads gained. CLOZE automates email marketing and creates branded templates that target specific clients. Additionally, M&C will use CLOZE to manage client communication so it never forgets a client. As shown on the right, the CLOZE app automates client reminders and to-dos and organizes when to send AI-generated marketing.
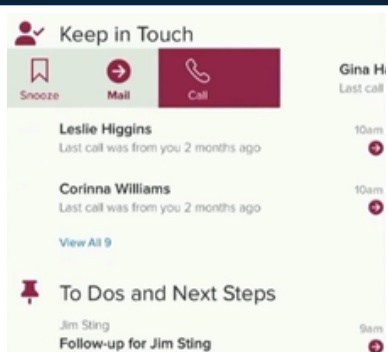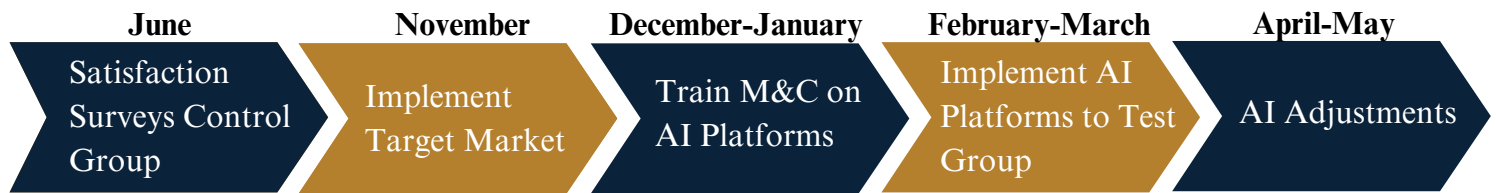
3 Create Luxury Experience

CubiCasa creates 3D floor plans and AI-generated virtual tours so clients can experience listings without visiting. This is helpful if clients have questions before seeing the listing or if they are located too far from the property. The floor plans to the right are generated from a 5-minute scan taken by the listing agent walking through the home. From this scan, CubiCasa also generates a Virtual Tour. Clients can "walk through" the home as if they were in it, or the tour can be uploaded to social media or YouTube as a video.

Timeline

| June	November	December-January	February-March	April-May
Satisfaction Surveys Control Group	Implement Target Market	Train M&C on AI Platforms	Implement AI Platforms to Test Group	AI Adjustments

Metrics

KPI	Excellent	Satisfactory	Poor
1.1: Deals Closed Within the Specified Target Market Each Year	>5 Deals/Year	3-5 Deals/Year	<3 Deals/Year
1.2: CAC (Customer Acquisition Cost)	<$100 CAC	$100-150 CAC	>$150 CAC
2. 1: NPS (Net Promoter Score)	>80 NPS	60-80 NPS	<60 NPS

1.1 KPI: M&C will ensure each closed deal aligns with M&C's target market using CLOZE's customer data.
1.2 KPI: To determine the cost of acquiring a customer, our team will divide the cost of the marketing strategies by the number of deals made. M&C will monitor and adjust this every quarter.

2.1 KPI: As a part of M&C's customer follow-up experience, it will send Net Promoter Score (NPS) surveys to clients who closed a deal with M&C, asking how likely they are to recommend M&C from 1-10.

Budget
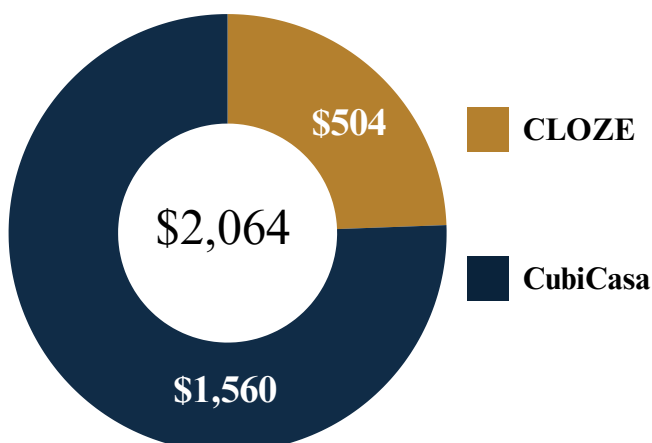
$2,064

$504 CLOZE
$1,560 CubiCasa

Period	Costs	Projected Revenue	Return on Investment (ROI)
Starting June 2026	$2,064	$180,000/year	8,721%

5 deals closed per year * 1.2 million house per client * 0.03 (3% commission)
= $180,000 per year

3

II. INTRODUCTION

A. Description of the business or organization

Manning and Clarke Realty (M&C) is a **real estate advisory company** based in Draper, Utah, owned by a mother-daughter team since 2019 under Summit Sotheby's Brokerage. The brokerage provides M&C with the legal framework and administrative support for real estate transactions. It ensures compliance with regulations and offers brand credibility and a network, helping attract clients and facilitate successful deals. M&C operates with a **3% commission** (a fee paid to an agent for facilitating a transaction, which comes from a portion of the house price bought or sold) per sale, splitting revenues equally. Typically, Stacie and Makenzie work with **3-5 clients monthly** during the slower late winter and early spring seasons but can handle **up to 8 clients** during peak months, summer, and autumn seasons. However, they only close around 20% of these deals, amounting to 1-3 deals per month based on the season.

Makenzie Clarke & Stacie Manning

> **"Referrals fuel our business, allowing us to focus on what matters most - our clients."**

– Stacie Manning

Values: Manning and Clarke Realty believes every client deserves a luxury experience. While its dedication to its customers creates high satisfaction, M&C sacrifices on marketing investments, ultimately limiting its potential to establish a prominent luxury brand.

B. Description of the target market (demographics and psychographics)

Problem

Manning and Clarke Realty has no target market to guide its client selection process, the company accepts all leads that reach out, primarily through referrals.

Current Target Market

Manning and Clarke Realty's target market presents various issues due to its referral-based client acquisition approach. Geographically, its **area of operation is too broad**, stretching across the Wasatch Front and Back of Utah, covering 9 counties (Wasatch, Salt Lake, Utah, Morgan, Cache, Davis, Weber, Rich, and Summit Counties). This large area collects a wide variety of clients of different ages and stages of life, providing **excess clients but very few of high quality**. These clients range from their late twenties to early fifties. This age difference influences the buying experience and budget, so M&C takes on clients at any price

Current Customer Profile

Shanda and Brent

28 and 26 Years Old

1 Child

Budget: $600,000

Location: South Salt Lake

Desired Location: Lehi

2 Bedroom, 1 Bath, 2 Car Garage

range, mainly **first and second-time home buyers.** M&C's clients have no distinguishing characteristics when it comes to family size, ranging from **couples in their twenties to elderly clients** looking to downsize. Clients with smaller families often purchase smaller homes, resulting in a lower commission for M&C. This makes finding a target market that better aligns with a luxury price point important for the business.

Demographics

- Late twenties to early fifties
- Any budget/price range
- 9 counties along the Wasatch Mountains

Psychographics

- No common characteristics with family size
- First or second-time home buyers
- Often seeking a downgrade or starter home

C. Overview of the business or organization's current artificial intelligence strategies and usage

Manning and Clarke Realty currently uses **RealScout**, an AI-driven platform, to streamline operations and enhance client experience. RealScout uses predictive analytics to personalize client communication and tailor client property recommendations. This platform provides clients with tools like Home Value Alerts and Market Activity Reports, increasing engagement and informed client decision-making. This user-friendly and efficient AI platform also **increases client satisfaction and streamlines communication.** The AI Platform sends out listings to specific clients based on their criteria. Once the client interacts with a message/listing, Stacie and Makenzie jump in and handle the communication and scheduling. M&C finds this AI platform useful since it doesn't have to search for listings to send to clients, saving time. Stacie and Makenzie have received a large amount of positive feedback from clients regarding the property recommendations sent by RealScout's AI, and Stacie and Makenzie enjoy the easy access to the platform.

RealScout Logo

Makenzie and Stacie have not looked into any AI programs besides RealScout so far. However, after realizing the benefits of AI and its uses in simplifying key tasks, both Makenzie and Stacie look forward to using more programs to further improve operations.

III. RESEARCH METHODS USED IN THE STUDY

A. Description and rationale of research methodologies selected to conduct the research study

Pre-Research:

Before researching how Manning and Clarke Realty could use AI, we conducted **pre-research** to understand if the company could benefit from using AI. We looked over different websites to understand if there was a wide range of possibilities for a real estate company to implement AI. We did this before starting our research or reaching out to M&C.

Research Goals

The research team focused on four goals: **identify** the current use of AI in marketing, client procedures, and data analysis within Manning and Clarke Realty; **determine** potential AI applications in real estate, including current programs that could benefit the business; **evaluate** existing procedures, including how clients are acquired and which steps are considered essential to a transaction; and **analyze** findings to create a comprehensive plan.

Identify   Determine

Evaluate   Analyze

Primary Research

Research Method	Description	Rationale
Interviews with Stacie Manning and Makenzie Clarke from M&C	M&C's current operations and AI use (current and prospective)	Learn the current and potential aspects of M&C's operations that AI can improve
Interview with Paolo Visentin from Visentin Real Estate	Current AI usage and client interactions in his business	Understand how real estate companies use AI and how M&C could utilize similar AIs
Interview with Jimmy Perry from Perry Real Estate	Jimmy Perry's current operations and AI usage	Assess how individual agents use AI differently from real estate companies
Interview with Alyssa Rutsey of HERE Technologies (HR Manager)	AI services offered in different industries	Broaden our understanding of AI functions and applications
Real estate survey on Daybreak Facebook page	Daybreak Facebook survey regarding potential clients' views on AI in real estate client interactions	Discover homeowners' opinions regarding AI usage in client communication, within M&C's target market

Secondary Research

Our team researched websites and articles that provided insight into AI applications, tools, and benefits in the real estate industry. Additionally, our team researched AI companies for specific platforms M&C could implement to improve its **marketing, communication, leads, and client satisfaction.**

Research Method	Rationale	Sources
Online research: Websites/Articles	Understand AI applications and identify tools that can be used in M&C's operations.	• The Motley Fool • Ascendix • National Association of Realtors • ACRE
AI Companies	Discover specific platforms we could implement into M&C's AI plan, further our knowledge of multiple AI platforms, and the possibilities of artificial intelligence.	• CLOZE • CubiCasa • Roof AI • Lately AI • Mailchimp • Monday AI • Likely AI

B. Process used to conduct the selected research methods

Primary Research

Our primary research involved 5 interactions: interviews with **3 real estate firms** (M&C, Visentin Real Estate, and Perry Real Estate), an **AI Company** (HERE Technologies), and a **survey** sent to Daybreak residents.

Main Questions Asked

Interviews:

Do you use AI in your business? If so, what have been the pros and cons?

What are the major time-consuming aspects of the real estate business?

What is the main way clients can discover you?

Surveys:

Have you used AI tools previously in home-buying?

Would you be open to using an AI virtual assistant?

Are you open to using AI in the home-buying process in general?

Interviews

Manning and Clarke

After researching Makenzie and Stacie's professional profiles and M&C's social media and website, we emailed them with questions about the **business's operations and AI usage.** Following their initial replies, we scheduled an in-person interview where we asked about **current processes, areas where AI could be implemented, and other business aspects.** We conducted two separate interviews after emailing preliminary questions.

Visentin Real Estate

We messaged Paolo Visentin of Visentin Real Estate to ask if he would be open to speaking with us. After he agreed to meet, we created a set of questions about his company's **current and prospective AI strategies,** which we addressed in the interview.

Perry Real Estate

After contacting Jimmy Perry of Perry Real Estate, we sent a detailed email with questions that aimed to explore AI's current use in Perry Real Estate and pinpoint **areas like customer service, property management, and market analysis that could benefit from AI advancements.** Jimmy Perry also helped us understand the broader impact of AI in the real estate industry.

HERE Technologies

We contacted Alyssa Rutsey (HR Manager) from HERE Technologies and arranged a FaceTime interview to explore AI's role at the company. Our questions aimed to uncover **AI's uses and HERE's pricing structures.** This discussion enhanced our understanding of AI's commercial viability and strategic implementation.

Survey of Daybreak Residents

A real estate survey was sent to the Daybreak Facebook page. Daybreak is a planned community owned by Larry H. Miller Company in Salt Lake County. The survey targeted home buyers in the Daybreak area and asked about **preferences regarding AI use when buying or selling homes.** Daybreak's Facebook page provided a convenient platform for distributing the survey and direct access to a demographic M&C targets.

Secondary Research

Our secondary research included four websites/articles and seven AI platforms.

Websites/Articles (Ascendix, The Motley Fool, National Association of Realtors, ACRE)

To identify relevant AI applications for Manning and Clarke Realty in the real estate industry, we searched the internet and discovered four sources: **The Motley Fool, Ascendix, the National Association of Realtors,** and **ACRE.** We evaluated specific AI platforms mentioned on these websites that Manning and Clarke Realty could utilize.
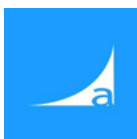
AI Companies (CLOZE, CubiCasa, Roof AI, Lately AI, Mailchimp, Monday AI, Likely AI)

While searching for different AI solutions Manning and Clarke Realty could integrate into its operations, we discovered seven companies: **CLOZE, CubiCasa, Roof AI, Lately AI, Mailchimp, Monday AI**, and **Likely AI.** We used these companies to gather information about potential applications of AI in the real estate industry generally and for Manning & Clarke's specific operations.

IV. FINDINGS AND CONCLUSIONS OF THE STUDY

A. Findings of the research study

Overall Findings

Key Finding #1: Lack of a Defined Target Market

While Manning & Clarke Realty operates across a wide geographic area (nine counties), the absence of a target market, as indicated by Stacie, prevents them from focusing on high-caliber clients and leveraging targeted marketing.

Key Finding #2: Ineffective Marketing Strategies

M&C's current marketing, including newsletters within Daybreak, a banner at Herriman High School, and an Instagram page, fails to generate significant client leads. Jimmy Perry notes that social media has potential, but its implementation lacks direction.

Key Finding #3: No Client Qualification Process

M&C gains its clients primarily through referrals from friends, family, and past clients. Due to this, M&C has hundreds of clients who reach out and does not have time to filter out these clients, forcing them to work with clients regardless of budget or quality.

Key Finding #4: Lack of Luxury Services

M&C aims to attract clients with higher budgets, but their services aren't different from those of other agents in the area. M&C lacks unique offerings, failing to position itself as a luxury service in the market and failing to attract higher-budget clients.

Primary Research

#1: Manning and Clarke Realty Findings

1.1: M&C notes that its target market is not defined.
When interviewing Stacie and Makenzie, our team asked what their target market was, and they said they "hoped we could figure it out for them." Their target market consists of any client who contacts M&C.

1.2: Manning and Clarke Realty gains clients mainly through referrals.
M&C relies mainly on referrals for its primary client acquisition. While this saves resources on other efforts, like marketing, it leaves M&C with a broad client base and an inability to shape its clientele.

1.3: M&C's marketing strategies are ineffective.
Manning and Clarke Realty has a banner at Herriman High, multiple newsletters within the Daybreak community, and a social media account. However, M&C notes that it does not gain many clients from these efforts, around three on average per year.

1.4: Manning and Clarke Realty provides no luxury services that differentiate it from competitors.
M&C defines itself as a luxury real estate company with its branding and partnership with Summit Sotheby's. Still, it offers no luxury benefits or services that differentiate it from competitors.

1.5: Referrals leave M&C with clients that provide minimal financial incentives.
Manning and Clarke aims to adjust its target market to clients with higher budgets to increase commission per sale. Still, its referral-based lead generation system leaves M&C with a broad selection of clients that provide a minimal financial incentive.

2.1: Efficient client communication is essential.
Paolo Visentin expressed how **clients appreciate to-the-point communication** and how efficient communication means a more productive process for the agent.

#3: Perry Real Estate Findings

3.1: Jimmy Perry has found social media to be a successful way of gaining clients.
Jimmy Perry notes that he has gained several clients through his social media platforms, and his clients have found it **easier to discover businesses through social media** than websites.

#4: HERE Technologies

4.1: AI can analyze patterns to form predictions.
HERE Technologies uses AI to create predictions from historical and real-time data. It uses various sources, including imagery, mobile devices, and public data feeds, to **make specific and accurate predictions** that inform business decisions.

#5: Real Estate Survey of Daybreak Residents

**5.1: Currently, the use of AI is limited in home-buying.**
When asked whether they used artificial intelligence tools, such as chatbots or virtual assistants, during home-buying and selling, 88% of respondents said they had not.

Yes
12%

No
88%
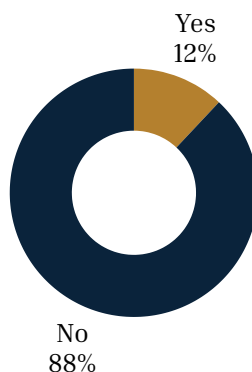
Have you used AI in the home-buying process?

5.2: Homebuyers have mixed opinions on using AI in the home-buying process.
When asked whether they would be open to using AI to save costs and time in the process, 36% answered "Unlikely," and 48% answered "Likely."

Unlikely
36%

Likely
48%

Neutral
16%
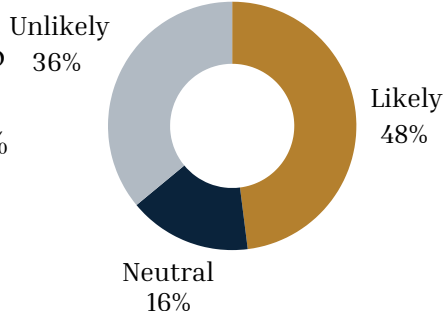
Would you be open to using AI in home-buying?

5.3: Homebuyers are more open to using AI in scheduling appointments than AI in other tasks.
After being asked whether they would be comfortable using an AI-powered virtual assistant to perform various tasks, including scheduling appointments, answering questions, and providing updates, 76% of respondents said yes.

No
24%

Yes
76%
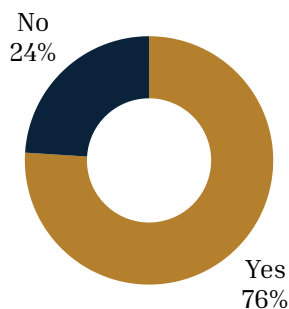
Would you be comfortable using an AI assistant?

Secondary Research

6.1: The most common and practical use of AI in real estate is predictive analytics.
Websites and apps like Zillow and Redfin currently use **AI-based programming to estimate housing values**. Forecasting is essential in commercial real estate. It allows agents to understand where the real estate market is headed, giving them an edge over the competition.

Top 5 Uses of AI in Real Estate from The Motley Fool: Predictive Analytics #1 Use

6.2: AI can generate marketing content.
AI can revolutionize real estate marketing by **automating content creation,** such as social media and client advertising. This AI technology streamlines tasks, allowing teams to focus on higher-value activities.

6.3: AI can determine buyer and seller predictions.
AI software can collect data from various sources to accurately **predict the likelihood of a homeowner** in a specified target market selling their property soon.

7.1: CLOZE assists with marketing, predictive analytics, and client communication.
CLOZE is an AI platform for marketing and CRM. It **creates email campaigns and templates** for consistent branding. The CRM **uses data analytics to recommend prospects** (which it sends to the agent each morning) and **automates client communication** with features like re-engagement reminders.

7.2: CubiCasa creates 3D Floor Plans and Virtual Tours.
CubiCasa uses AI to create floor plans and virtual tours of listings. The agent uses the CubiCasa app to take a 5-minute scan of the listing and upload this to the app. Then, CubiCasa generates a 3D customizable floor plan and virtual tour. These tours can be posted as videos on social media or uploaded to the agent's website, where the client can walk through the house virtually. Most agents do not offer benefits like these.

7.2: Lately AI automates social media.
Lately AI **automates social media by generating posts** specific to a target market. This boosts engagement and increases lead generation by targeting a specific market.

7.3: AI can be used to improve client communication and assess leads.
Roof AI can enhance client screening and engagement. It uses surveys and questions to **filter out clients unlikely to buy** and make data-driven decisions for quality prospects. This makes the sale process easier because it leads to less time commitment.

7.4: Monday can assist with client management.
This CRM (client relationship management) platform streamlines client communication by **automating recurring emails** and integrating seamlessly with other applications. It also triggers automatic actions upon task completion to enhance efficiency.

7.5: Mailchimp can create efficient email campaigns to help agents with marketing.
Using AI and audience segmentation, Mailchimp can **send emails to potential clients** most likely to interact. Analyzing user interactions refines recipient lists to prioritize those more likely to engage. The platform also schedules automated follow-ups to increase interaction.

7.6: Likely AI can analyze data to create accurate predictions.
Likely AI offers AI software that collects data from thousands of sources to accurately **predict the likelihood of a homeowner within a specified target market selling their property** within 90 days.

B. Conclusions based on the findings

1 **Defining a specific target market is essential for Manning and Clarke Realty's growth and future opportunities.**

Serving low-quality leads limits M&C's ability to gain high-quality clients. Establishing a clear target market will allow AI platforms to attract and retain these clients by targeting a specific demographic, increasing Manning and Clarke Realty's average commission.

2 **M&C can use CLOZE's AI-generated digital marketing campaigns to attract high-quality clients.**

M&C can use CLOZE to improve its marketing efforts. Using CLOZE's marketing templates, M&C can automate advertisements and social media posts to create a brand image catering to a luxury clientele.

3 **Using CLOZE, M&C can categorize leads by established target market qualifications.**

By having access to M&C's emails and past client information, CLOZE can filter out clients who reach out to M&C, leaving only the clients who fit M&Cs target market. This will allow M&C to focus resources and time on higher quality clients who provide higher financial return.

4 **Implementing CubiCasa's 3D floor plans and virtual tours will strengthen M&C's reputation as a luxury brand.**

To align with the proposed target market and gain a competitive advantage over competitors, Manning and Clarke Realty needs to offer a luxury experience for clients. CubiCasa's 3D floor plans and virtual tours will attract high-quality clients who expect elevated services.

V. PROPOSED STRATEGIC PLAN

A. Objectives and rationale of the proposed strategic plan

Problem Statement

Manning and Clarke Realty is losing potential revenue due to the absence of a defined target market. Ineffective marketing strategies, a lack of client screening, and an undifferentiated brand prevent M&C from attracting and securing high-value clients.

Objective 1: Capture and Manage Leads

Based On: Conclusion 1, 2, & 3

Strategy: Implement CLOZE's CRM and marketing platforms to attract and manage high-quality potential clients.

Description: Our team will implement CLOZE AI to attract clients through digital marketing campaigns and manage high-priority leads through CLOZE's CRM platform. CLOZE will develop templates and email campaigns for marketing and organize/prioritize leads through a daily list of clients to reach out to. M&C will implement CLOZE AI's marketing features, including email campaigns, marketing templates, and daily lists of clients to follow up with.

Rationale: By using CLOZE to optimize marketing spend, improve lead quality, and allow M&C to focus on its new prospective target market, M&C can refine its clientele to generate higher commissions and reduce waste on ineffective marketing campaigns.

Objective 2: Create Luxury Brand

Based On: Conclusion 4

Strategy: Implement CubiCasa to enhance client experience and reinforce M&C's luxury brand positioning.

Description: Our team will implement CubiCasa to improve customer satisfaction and establish a luxury brand. CubiCasa will create both 3D floor plans and AI virtual tours so clients can better experience properties through customization and efficiency. The ability to access listings virtually aligns with M&C's prospective target market since clients from out of state will be able to view and customize homes. Improving M&C's luxury offerings will improve the quality of customers that it attracts.

Rationale: By using CLOZE to optimize marketing spend, improve lead quality, and allow M&C to focus on its new prospective target market, Manning and Clarke Realty can refine its clientele to generate higher commissions and reduce waste on ineffective marketing campaigns.

B. Proposed activities and timelines

Our team has created a 3-step plan from June 2025 to June 2026 to achieve our two objectives.

1   **Refine Target Market:** To effectively guide the AI platforms our team has selected, we will define a clear target market that will aim to increase clientele quality.

2   **Implement Marketing Strategies and Filter Leads:** M&C will use CLOZE to enhance its marketing efforts to reach its new target market from step 1 of the plan. M&C will then use CLOZE's CRM AI to organize, filter, and engage with its new leads.

3   **Develop Luxury Experience:** To further attract its prospective target market, our team will implement CubiCasa to create a high-quality experience since high-quality leads appreciate luxury experiences.

1 Refine Target Market

Objective: Simplify and refine Manning & Clarke's target market to increase commissions per sale and establish a luxury brand. By focusing on quality over quantity, M&C can attract high-value clients who align with its luxury positioning.

New Target Market

Geographics/Demographics

- **Location:** From the Midwest region relocating to Utah
- **Target Area:** Salt Lake County, Daybreak (a planned community owned by Larry H. Miller Company, 30 minutes from Silicon Slopes, 40 minutes from Downtown Salt Lake)
- **Age Range:** Late 30s to Early 50s
- Education Level: Bachelor's degree or higher (familiar with high-value investments)
- **Income Level:** $250K+ household income
- **Family:** 4+ family members

Psychographics/Behavioral

- Interests: Skiing, hiking, and outdoor recreation
- Values: Community, diversity, social connections, activities, quality neighborhood/neighbors
- Lifestyle: Luxury-focused, experience-driven, family lifestyle
- Buying Habits: High-end real estate, luxury ski equipment, ski passes, resorts, luxury brands
- Budget: $1.2 Million+

New Buyer Client Profile

Family: 3 children
Current Residence: Anaheim, California
Prospective Residence: Daybreak, South Jordan, UT
Home Requirements: 5-bed, 4-bath, backyard, 4-car garage, pool, advanced security system
Area Preferences: Family-friendly community, proximity to ski resorts, high-quality schools, scenic views, safe neighborhoods, community amenities
Buyer Expectations: Experienced realtors with deep market knowledge, responsive communication, and the ability to explore housing options without traveling between states

Client Story: Brent and Shanda, currently residing in Anaheim, California, are looking to relocate to Utah due to environmental and lifestyle factors. They discovered Manning & Clarke through Summit Sotheby's national presence. With limited knowledge of Utah's real estate market, they seek experienced realtors who can provide a seamless, high-end home-buying experience. They are willing to invest in luxury services that ensure a smooth transition to their new home.

Brent and Shanda

38 and 41 Years Old

3 Children

Budget: $1,100,000

Location: Anaheim, California

Desired Location: Daybreak

5-bed, 4-bath, Backyard, 4-car Garage, Pool, Advanced Security System, Experienced Realtor

Activity 2.1: CLOZE Marketing

Objective: By implementing CLOZE's CRM solution, Manning & Clarke aims to achieve personalized marketing that effectively reaches and converts potential clients.

Key features include:

Emails that Drive Engagement: CLOZE will schedule and send weekly emails designed to engage customers who align with M&C's target market.

Branded Templates and Design: Professional templates and branding that ensure consistent and appealing communication for flyers, emails, listings, and newsletters, which will be distributed within M&C's targeted area.

Automated Marketing: Scheduled newsletters and automated campaigns create effective, consistent client engagement for M&C without manual input.

Rationale: Currently, M&C relies solely on referrals for its lead generation. By creating refined marketing strategies, Manning and Clarke Realty can address its large and undefined client pool. This automated marketing will not take excess time away from clients but will allow M&C to align with its prospective target market. M&C will implement this specific platform because of CLOZE's ability to provide a wide scope of marketing tools, target specific demographics, and maintain low costs. These marketing strategies will reach and attract Manning and Clarke Realty's specific target market.

AI Client Message

AI Summary of Marketing Article

Marketing Article

Example Email Sent to Clients

Activity 2.2: CLOZE CRM

Objective: M&C will use CLOZE AI's CRM platform to enhance M&C's lead generation. Once Manning and Clarke Realty is signed up for CLOZE, it will access all of M&C's client history. CLOZE will use this information and AI to customize several features that will allow Stacie and Makenzie to discover quality leads and stay on top of them.

Key Features:

Comprehensive Data Access: Upon signup, CLOZE integrates Manning and Clarke Realty's client history, including emails, calls, messages, real estate portals, social media, newsletters, and public records to identify high-quality leads.

Automated Daily Schedule: CLOZE generates a personalized daily agenda for M&C, outlining follow-ups, tasks, important dates, new leads, and meetings to ensure no client is overlooked.

Smart Follow-Ups: CLOZE tracks all communication—inside and outside its platform—and schedules follow-ups based on client history and M&C's preferences. High-value clients may receive follow-ups every two weeks, while lower-priority leads may be contacted every two months.

Lead Engagement Automation: CLOZE immediately creates a contact and sends an initial email or text when a new lead is identified. Follow-ups are tailored to each client, allowing Stacie and Makenzie to step in once a high-value lead engages.

Targeted Lead Filtering: M&C can set specific criteria—such as price range, location, and lead qualifications—to ensure new leads align with its target market.
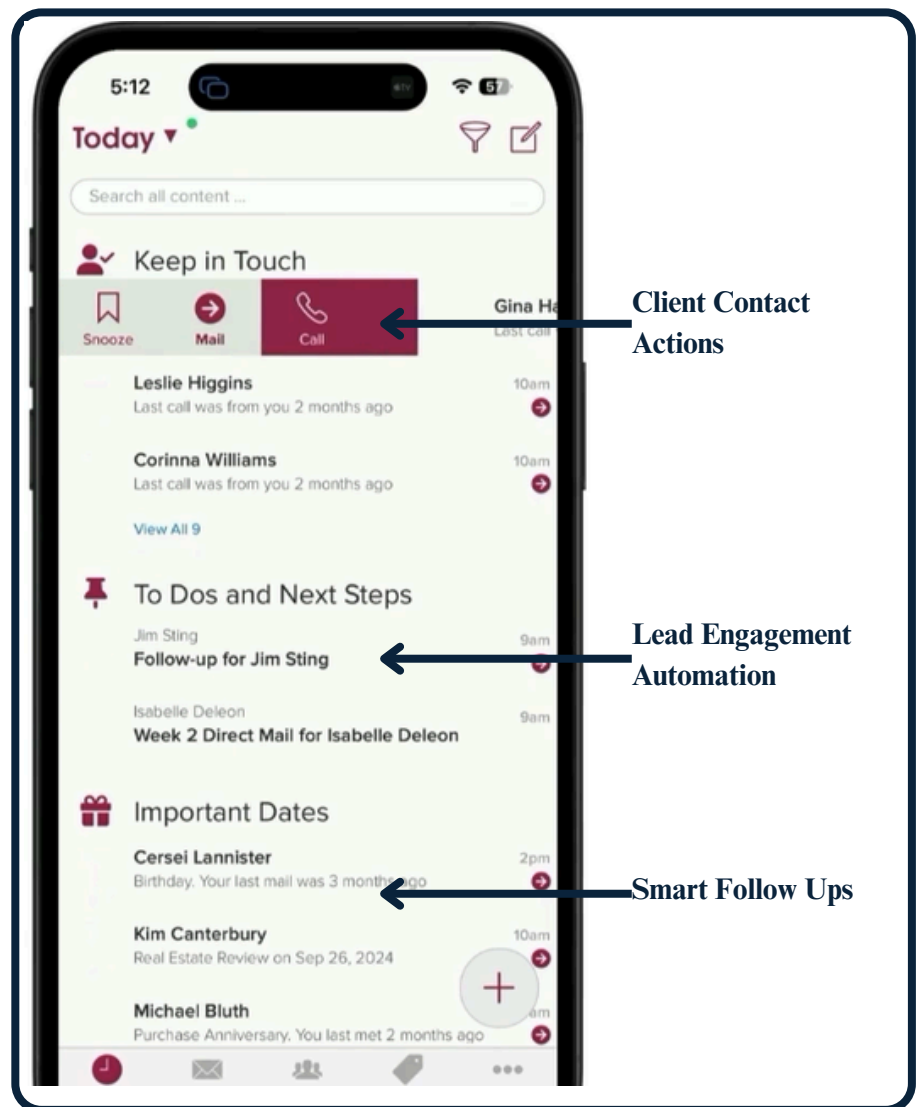
Example Email Sent to Clients

Rationale: By automating lead filtering and client engagement, M&C can streamline operations, reduce time spent on unqualified leads, and focus on high-value clients who align with its luxury brand. This approach maximizes efficiency, enhances client relationships, and increases profitability.

3 Create Luxury Experience

Activity 3.1: CubiCasa

Objective: CubiCasa creates both 3D floor plans and AI-generated virtual tours for clients so they can experience each listing without having to visit. This is helpful if clients have any questions before seeing the listing in person or if they are located too far from the property. Being able to customize listings to better experience homes enhances the experience M&C provides to its clients. This further aligns with the target market our team has created, which includes families from out of state.

3D Floor Plans

3D Floor Plans:

The following is the timeline for creating a 3D floor plan for a property:

1. Property is listed, either by M&C or another agent
2. The client expresses interest in the property
3. Stacie or Makenzie will visit the property to take a 5-minute scan/walk-through
4. AI takes the scan and generates the Floor Plan

Clients can change the furniture in the property to see if the area works for their needs. The scan also provides the property's size and dimensions in the floor plan.

Example 3D Floorplan

Virtual Tours
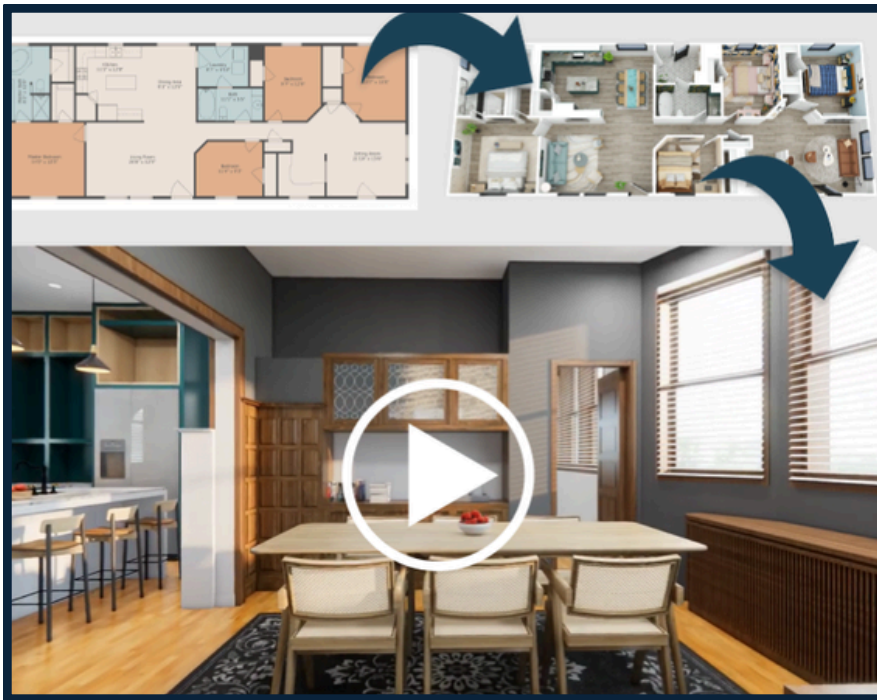
Example Virtual Tour

Virtual Tour:

Based on the 5-minute scan taken by either Stacie or Makenzie, CubiCasa's AI creates a virtual tour. Clients can essentially "walk" through the property on their computer, choosing where they want to go. This is different from a floor plan since they will be able to see the listing from the point of view of being within the home. These tours can be downloaded in landscape and portrait video format for multiple uses, including social media. Manning and Clarke can send these tours to clients so they can better envision a property.

Rationale: With the luxury market in mind, especially affluent out-of-state buyers, CubiCasa's virtual tours and 3D floor plans will give clients who are not local the ability to explore properties before making a decision, setting M&C apart from other real estate agents within Utah. The features create ease for luxury clients, increasing their likelihood of being satisfied with the service and recommending it to others.

Timeline

Our team has created a year-long implementation timeline to effectively integrate and test CLOZE and CubiCasa. We will begin by implementing surveys in June 2025 and complete AI adjustments in May 2026. Our first full implementation month will be June 2026.

June 2025

Control Group: M&C will send out client satisfaction surveys to the clients they work with during the high season. This will be the same survey that we will send during the testing period of our plan. (June-August)

November 2025

Target Market: Stacie and Makenzie will approve and make adjustments to the target market our team created, if needed.

December-January (2025/2026)

Training and set-up: During the slow winter season, M&C will learn how to operate CLOZE and CubiCasa using virtual tutorials offered by both AIs. M&C will also learn to customize CLOZE's marketing templates and campaigns.

February-March 2026

Testing: M&C will implement CLOZE and CubiCasa into its operations with a client test group to assess their effectiveness. Surveys will be sent to clients again and used to compare satisfaction from June to February.

April-May 2026

Adjustments: Using feedback from surveys of clients and staff, our team will adjust the plan according to any complaints received. This will ensure that M&C can use both AIs perfectly in time for the summer high season.

We will conclude our implementation timeline in June 2026. June will be the first full implementation month after the adjustments phase, during which both AI platforms will be fully used with all clients. We will also finish testing our metrics for the first time in June.

C. Proposed metrics or key performance indicators to measure plan effectiveness

KPI	Excellent	Satisfactory	Poor
1.1: Additional Deals Closed Within the Specified Target Market Each Year	**>5 Deals Annually**	**3-5 Deals Annually**	**<3 Deals Annually**
1.2: CAC (Customer Acquisition Cost)	**<$100 CAC**	**$100-$150 CAC**	**>$150 CAC**
2. 1: NPS (Net Promoter Score)	**>80 NPS**	**60-80 NPS**	**<60 NPS**

1.1 KPI Description: Using CLOZE's AI to track customer data, our team will assess each closed deal to ensure it aligns with M&C's target market. M&C Realty currently closes around 24 deals per year. Our team aims to close 5 additional deals from our strategic plan, as verified by CLOZE's tracking.

1.2 KPI Description: To determine the cost of acquiring a customer, our team will divide the cost of the marketing strategies by the number of deals made. Manning and Clarke Realty will monitor and adjust this every quarter. For instance, if CLOZE costs $504 in one year and M&C gains 5 clients, the CAC would be $100.80. Our team aims to have a CAC of less than $100.

2.1 KPI Description: As part of our customer follow-up experience, we will send out Net Promoter Score (NPS) surveys to each client who closed a deal with M&C. In this survey, customers will rate how likely they are to recommend M&C's services to friends, family, or neighbors on a scale from 1 to 10. We aim to reach this metric by November 2026.

VI. PROPOSED BUDGET

Costs associated with proposed strategies

Our budget is divided into costs and expected revenue of the training, testing, adjustments, and full implementation phases beginning in June 2025. The projected revenue is based on 5 additional deals closed per year for M&C, which satisfies Key Performance Indicator 1.1.

Trial and Testing

Month	Cost (From 2 AI Subscriptions)	Projected Revenue	Explanation
December - January	$172	$0	Teach M&C AI functions
February - March	$172	$0	Test group implementation
April - May	$172	$0	Fix AI malfunctions
June	$172	$4,200	Full implementation

Based on KPI 1.1:
5 deals closed per year * 1.2 Million house per client
* 0.03 (3% commission)
= $180,000 per year

Yearly Costs:

$504 — CLOZE
$2,064
$1,560 — CubiCasa

Period	Costs	Projected Revenue	Return on Investment (ROI)
Starting June 2026	$2,064	$180,000/year	8,721%
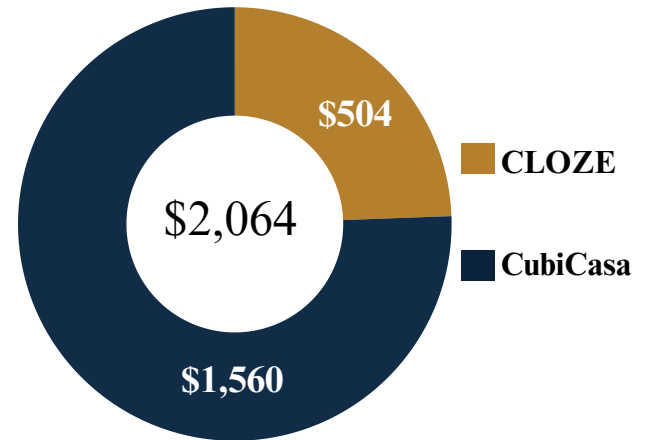
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