

# WELCOME TO MILESTONES: A MIAMI REALTOR BENEFIT

Engage consumers at every stage of homeownership  
to win **forever clients**.

Presented by:  
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Agent Growth Manager

# REAL ESTATE CHALLENGES

On average, homeownership is a *decade-long* journey that includes:

- Buying (4 to 6+ months)
- Moving (4 - 8 weeks)
- Owning (10 years)
- Selling (this varies, but typically months)



# REAL ESTATE CHALLENGES

A *decade-long* sales cycle poses challenges for agents.

- **Low Loyalty** - 13% of consumers working with the same agent twice
- **Low Volume** - 9 out of 10 consumers won't transact in the next 12 months
- **Down Market** - With interest rates at a 15-year high, 64% homeowner have a rate below 4% homeowners are not moving anytime soon, resulting in fewer transactions



# THE SOLUTION

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The easiest way to move up-funnel is to strengthen relationships with homeowners *before* they're ready to transact again.

- Offer homeownership hubs to all of your current leads and past clients to *provide a valuable service and keep them coming back*
- Gain a competitive advantage by delivering meaningful home management solutions to *increase retention and referral business*



# WHO WE ARE

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Milestones offers personalized client portals (“hubs”) specifically designed to engage consumers at **every** stage of the homeowner journey.

Build **forever clients**, one hub at a time.

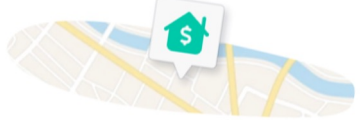


# HOMEOWNERSHIP HUBS

Invite every homeowner you know to a hub and bring them back to the hub with *branded and relevant content*.




- Building Wealth with Finance Insights
- Home Improvements
- Home Management Tasks & Education
- Home Services
- Home Document Storage

1001 Fiesta Street  
Your updated home value estimates are ready for review




**\$123,456**  
↑ \$1,345 in the past month  
based on the average of multiple home value estimates as of MM/DD/YYYY

1001 Fiesta Street  
Your {month} home management

 <b>10</b> UPCOMING	 <b>3</b> OVERDUE	 <b>120</b> COMPLETE
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1001 Fiesta Street  
Get your home in shape for spring.



It's time to get **1001 Fiesta Street** ready for spring. Take a look at the essentials below, and check out our local favorite pros if you need help checking things off the list.

Recent Home Sales  
near 1001 Fiesta Street

<b>17</b> NEARBY SALES	<b>28</b> AVG. DAYS ON MARKET	<b>\$304</b> AVG. COST PER SQFT.
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# BUILDING WEALTH INSIGHTS

With Home Finance Insights, *homeowners can:*

- Check their home value, mortgage, and equity options
- Learn how to save money
- Unlock their finances
- Easily connect with their agent's loan officer

The dashboard shows a navigation menu on the left with categories like DASHBOARD, FINANCES, MANAGEMENT, HOME SERVICES, IMPROVEMENTS, SEARCH HOMES, KNOWLEDGE CENTER, and MY HOME. The main content area is titled '101 Collier Mountains' and includes tabs for Home Value, Market Insights, Ways to Save, Take Cash Out, and Purchasing Power. The primary focus is on the home value estimate, which is \$422,000, with a 13.2% increase (\$90,000) since purchase. Below this is a timeline and estimates section with a slider ranging from LOW to HIGH. A list of data sources is provided, including plunk, CoreLogic, ATTOM, and Zillow, each with a value and an update date of 06/13/2021. On the right side, there are profiles for three professionals: Emily Van Hoosen (Real Estate Agent), Kyle Long (Loan Officer), and Samantha Jones (Home Concierge), each with contact information and a 'Send Message' button. At the bottom right, there is a 'Your Mortgage' section with an 'Update' button and a 'Quicken Loans' section showing '30 Year Fixed at #.###%' and a 'Balance \$###,###'.

This section is titled 'This is what you've paid' and features a pie chart. The chart is divided into two segments: a green segment representing 'Toward Principal' at \$18,395 and a red segment representing 'Toward Interest' at \$31,771. Below the chart, there is a text box stating: 'We've based these calculations on the following loans from public records: 30 year loan at 3.625% for \$181,605 from Oct 2017'. An 'Update Mortgage Details' button is located at the bottom of this section.

This section is titled 'SAVINGS OPPORTUNITY' and contains the following text: 'Make additional monthly payments if you paid \$200 more each month, you could save \$19,444 in interest payment and pay off your loan 3 years faster!'. At the bottom, there are two buttons: 'I've Made Extra Payments' and a red 'Learn More' button.



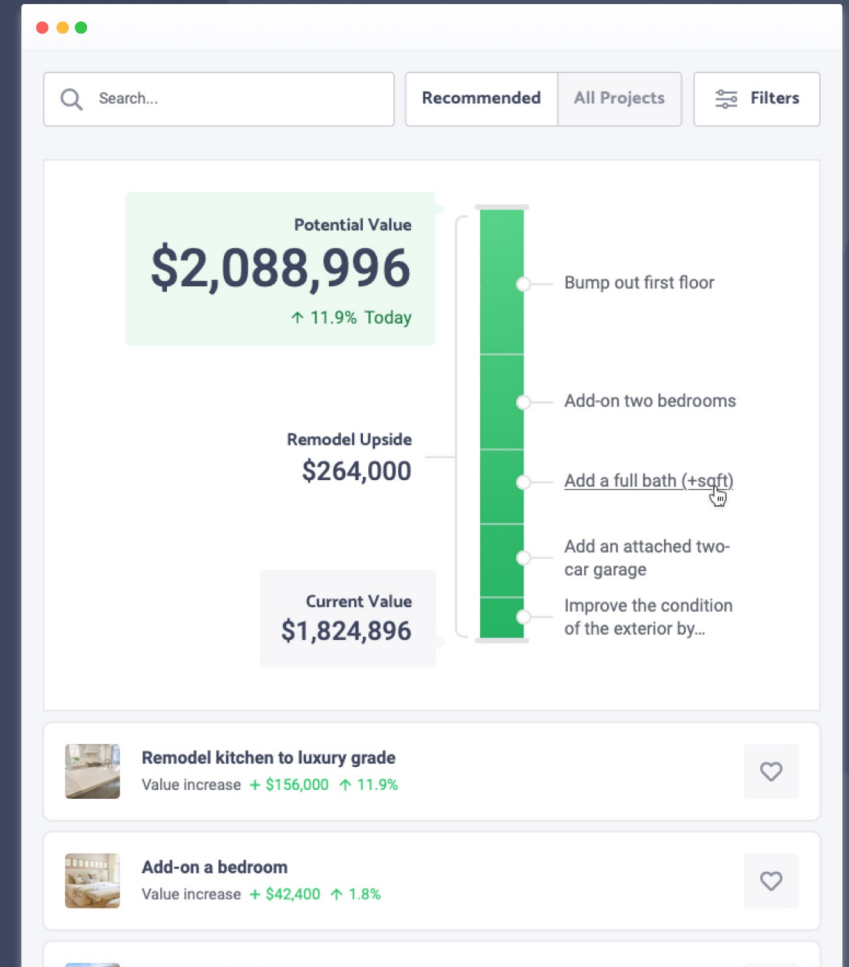
# HOME IMPROVEMENTS

With Home Improvements, *homeowners can*:

- View high-impact home improvement recommendations, ranked by return on investment
- Be empowered with data-driven financial guidance to increase the values of their homes over time

With Home Improvements, *agents can*:

- Create revenue streams for companies *between* transactions (i.e. HELOC etc)
- Drive awareness and opportunities/leads to home services partners





# HOME MANAGEMENT

Help homeowners understand how to protect, maintain, and improve their most valuable asset, increasing homeowner engagement.

- Monthly task reminders
- Educational articles with a direct path to home service providers
- Home protection services
- Weather & climate notifications



101 Collier Mountains

Your good housekeeping tasks for

## April



Apr 1

**Check your water heater tank for leaks or rust**

A rusty or leaking hot water heater tank can lead to much bigger problems like wall or furniture damage. Catching it early could save you a lot of time and money.

[Go to My Home Ownership Hub](#)

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# HOME SERVICES

With a curated home services network, agents can facilitate referrals to their trusted partners and increase lead gen opportunities.

The Home Services “marketplace” consists of over 90 types of service providers with access to over 500,000 providers within seven categories:

- Real estate services
- Home services
- Appliances & Systems
- Cleaning
- Outdoor
- Remodeling
- Renovation

The screenshot displays a user interface for a home services marketplace. On the left, there is a vertical list of service categories, each with an icon and a 'Recommended' badge. The categories shown are: a screwdriver and wrench, two hands holding a wrench, a house with a wrench, a paintbrush, and a toilet. A 'Send Message' button is visible next to the top category. In the center, there is a 'Start a project!' section with a text input field and a 'Send Message' button. On the right, a detailed profile for 'Joe Willis, Plumber' is shown, featuring a circular profile picture, a 'Recommended' badge, a 5-star rating, and a 'Send Message' button.



# WHY MILESTONES

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For Miami **real estate professionals**, we deliver customized, client homeownership portals to stay connected and deliver ongoing personalized value throughout the entire homeownership journey.

- **Nurture** client relationships before, during and after the transaction with a personalized hub that fits their existing home situation.
- **Engage** clients at each stage of their homeownership journey to increase repeat and referral business.
- **Win** every client by delivering valuable information on their largest asset and never lose a client again.

With the ***Professional Version***, you have access to additional Milestones hubs including Sales, Purchase, and Move hubs, and can ***white-label every hub to extend your brand.***



# WHAT THEY'RE SAYING

WE ♥ OUR CUSTOMERS



## SETH MILLS

Team Leader, Keller Williams Lake Cities

“With Milestones, we’ve not only achieved the highest adoption rate among all other systems we’ve implemented, but we’ve also witnessed the incredible impact it has on our client’s satisfaction and our business growth. **Out of 333 homeownership hub invitations sent, 253 accepted, resulting in 6 requests for home valuations and 2 listings.**”



# THANK YOU

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## VISIT THE MILESTONES BOOTH TO GET STARTED!



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