

Special: Profile

Success From The Summit: Lucero Summit's "Do Wonders" Office Management Software

BY ANDREA PERSONETT

Lucero Summit is at the pinnacle of success with its multi-featured office productivity tool and the dynamic rise of its national referral network. As comments from its software users acclaim, Lucero has had a profound and lasting impact on real estate brokerages around the globe.

"Lucero has given me the time to think — to grow my business."

Mary Holder is owner of the Mary Holder Agency in Springlake, NJ. "I started my company 12 years ago," she says. "We now have nine branch offices with over 200 agents. Boy, did I need a lot of help figuring out commissions about six years ago. Now, thanks to Lucero, we do it automatically. And I don't have to worry about figuring splits. My managers love it — Lucero writes their business reports for them! Most importantly, Lucero's given me time to think, so I can continue to grow my business."

Mary Holder's experience with

Lucero Summit's "Do Wonders" program is typical. This premier real estate office management software has been indispensable to brokers in 18 countries for nearly twenty years. Automated commission calculation is the lynchpin of Lucero's sales management module, which also compiles hundreds of reports vital to business growth and profitability.

Besides sales management, Lucero features other key management modules — listing/updesk, leads, showing appointment scheduling, transaction, task, agent, referral, client, advertising, and Web site, plus many more. With additional Internet features and its server farm option, Lucero substantially reduces staff workload and improves



office professionalism and agent accountability. With hundreds of decision-oriented reports at the broker's fingertips, Lucero promises dramatic bottom-line improvement. It also boasts the fastest growing referral network in the nation.

Helping Lucero dominate the real estate office management software market is its progressive pricing structure, accommodating startup companies to some of the largest companies in the nation.

"We purchased Lucero in 1998 when we had only three offices," remembers Caroline Rush, Century 21 Judge Fite in Dallas. "Now we have 20. As we've grown, the program expanded with us. When we purchase a company, we're able to meld its commission plan into ours."

"The consummate office productivity tool in real estate today."

Florida Realtor Magazine gives Lucero high praise: "It is a comprehensive, highly integrated software system.

"Lucero Summit Affordable is for all size companies" — Glenn Hunter

Contributors To This Article

- ◆ Jan Bauer, ERA Trend Realty in Gainesville, FL, (80 agents)
- ◆ Chuck Doremus, Karpe Realty in Bakersfield, CA, (20 agents)
- ◆ Sally Estes, co-owner, Gaslight Properties in Columbia, MO, (168 agents)
- ◆ Jon Gudbrandsson, New Millennium Real Estate in Brooklyn, NY, (8 agents)
- ◆ Ned Heath, consultant to Signature GMAC Real Estate in Orlando, FL, (270 agents)
- ◆ Mary Holder, the Mary Holder Agency in Springlake, NJ, (200 agents)
- ◆ Colleen Iddings, Coldwell Banker Walter Williams Realty in Orange Park, FL, (220 agents)
- ◆ Iris King, managing partner, Avalor Mortgage & Real Estate in Las Vegas, NV, (30 agents)
- ◆ Vinnie McAuliffe, Prudential Zack Realtors in Ship Bottom, NJ, (85 agents)
- ◆ John Poletto, Nestler-Poletto Realty in Boca Raton, FL, (120 agents)
- ◆ Caroline Rush, Century 21 Judge Fite in Dallas, TX, (650 agents)
- ◆ Lee Shaw, Windermere Heritage in Camby, OR, (25 agents)
- ◆ Chuck Schoble, president, Avalor Real Estate and Mortgage Network (670 agents, 62 franchise offices)

***“We loved Lucero Summit so much in our 9 office, 600 agent corporate office that we decided to add it as a part of every Avalar Franchise.”
- Chuck Schoble, President, Avalar Real Estate and Mortgage Network***

Despite its immense powers, it is remarkably easy to use — developed and written by a software author with years of experience in both real estate and software development — and field tested by thousands of real estate pros around the world. The consummate office productivity tool in real estate today.”

How do most brokers quantify productivity? Reduction in staff workload — the more drastic the reduction, the better. Lucero saves literally thousands of hours by providing comprehensive listing, leads, sales, agent and transaction task management. Part of Lucero’s popularity is its use of user-friendly interfaces like Microsoft Word, QuickBooks, CompensationMaster and QSC.

Ned Heath, previously owner of Higgins & Heath Better Homes & Gardens in Orlando, FL, used Lucero to build his company to one of the largest companies in Orlando. When his company was acquired by NRT, he became a regional officer. Now back in Orlando as a consultant for Signature GMAC Real Estate, Ned boils down Lucero’s productivity enhancement into the single entry feature: “It requires one person instead of many — so accuracy and efficiency are much better.”

“It’s a great management tool ...”

“It’s a great management tool for us,” says John Poletto, Nestler-Poletto Realty, Boca Raton, FL, and a Lucero affiliate for eight years. “We create and incorporate new commission plans for our associates. It’s extremely efficient. We want to grow with Lucero.”

Iris King, managing partner of startup Avalar Mortgage & Real Estate in Las Vegas, has tripled her number of agents in seven months, attributing her growth and productivity to Lucero: “The task management feature is a great tool. Things don’t fall through the cracks.”

Ned Heath adds: “All the information you could possibly want about an agent or an office at your fingertips on

The Lucero Summit Pros

Howard Jones, Lucero author

Howard Jones began programming computers in 1971 while he was studying for his bachelor’s and master’s degrees in Chemical Engineering at Michigan State University. After graduating summa cum laude, he joined Chevron Research in San Francisco. Five years later, he strengthened his programming skills when he became a PhD. candidate in Chemical Engineering at the University of Arizona. In 1984, Howard entered the real estate business and began work on the Lucero System for Real Estate Office Management. He is an avid mountain climber and sailor. When not writing Lucero software in his office, he can frequently be found seeking the highest places on the planet or sailing the high seas, while continuing to program enhancements wherever he may be.



Glenn Hunter, President, Lucero Summit Sales & Training

Glenn directs his sales force from Tallahassee, Florida. He was owner and manager of a two-office Premier Real Estate company for over 25 years. He discovered the power of Lucero in 1988, after he invested a large sum of money in a custom office management system. Then he saw Lucero — and immediately replaced his custom system. His offices ran more efficiently than ever, making him the market leader. Glenn directly attributed his success to Lucero. In 1995, he sold his real estate offices to form Lucero Summit Sales & Training.

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a minute-to-minute basis — it's unbelievably helpful. It's like flying a plane — if you don't have the instruments, you can't fly in the fog. And in real estate, if you don't have the financial and operational information at your fingertips, you can't run the company."

"It's the backbone of our company."

Sally Estes, 10-year Lucero user and Gaslight GMAC co-owner in Columbia, Missouri, now has ten offices. "The performance analysis," says Estes, "has helped in the accountability of our agents. We use it primarily as a back-office tool. It's the backbone of our company."

"We're more productive, especially since we went to the terminal server. Online, we save a lot of time with the single database." The terminal server with Ozline gives agents and brokers access to Lucero anywhere, anytime.

"We really like the data broken out so we can rank our individual agents according to company dollar," says Ned Heath. "A lot of focus is put on the top agents. But often a company doesn't make much off the top agents. Lucero's reports can focus on the real money-makers in each office. Then we can show the appropriate appreciation to the people who make the real dollars. And, we're constantly up-to-date. Lucero's terminal server allows everyone in all the offices to work on an Internet-based

system. It's so much easier."

The optional terminal server is faster than most Local Area Networks. Plus, the latest version of Lucero is always in use on the server farm, eliminating the need for offices to download newer versions as they are developed. An office's data resides on the remote server, and backups are saved to the office's local server anytime, secured by encryption commonly used by online banking. No need to upgrade hardware — almost any computer with Internet access will work.

Estes adds, "Lucero has helped us manage our growth. We had a better year in 2004 than ever before. Lucero showed us agents we recruited in 2003, and that's where the growth was. That

Screen Shot Using Lucero Summit's Software

The screenshot displays the 'Lucero Contract Window - 5001b' interface. At the top, it shows the contract ID '990102 (In-House Transaction)' and a 'Flagged' checkbox. Below this are navigation tabs for Summary, Financial, Agents, Referrals, Sellers/Buyers, and Notes. The main area contains a table with columns for Transaction, Listing Side, and Buying Side. To the right of the table are several input fields and checkboxes, including 'Default', 'Deductions', 'Service Fee', 'Earnest Deposit Amount', 'Reference', 'Date', and 'Payee'.

	Transaction	Listing Side	Buying Side
Award Distribution:	100.00 %	50.000000	50.000000
List Price:	245000.00	245000.00	245000.00
Sale Price:	239000.00	239000.00	239000.00
Effective Rate:	7.0000	4.0000	3.0000
Commission Amount:	16730.00	9560.00	7170.00
Other Income (shared):	0.00	0.00	0.00
Other Income (unshared):	0.00	0.00	0.00
Gross Income:	16730.00	9560.00	7170.00
Referral Fees:	1434.00	0.00	1434.00
Service Fee:	917.76	573.60	344.16
Deductions:	0.00	0.00	0.00
Adjusted Gross:	14378.24	8986.40	5391.84
Agent Commissions:	9452.80	5258.00	4194.80
Non-Company Dollar:	0.00	0.00	0.00
Company Dollar:	4925.44	3728.40	1197.04

Default

Deductions

Service Fee

Earnest Deposit

Amount: 20000.00

Reference: A-507351

Date: 01/25/05

Payee:

“If greater productivity, accountability, growth and profitability are what you strive for, Lucero is the last software you’ll ever need.”
- Glenn Hunter, President, Lucero Summit Sales & Training

information, readily available, was wonderful.” Lucero affiliates recruit top agents who want to be part of a professional office to earn the most with the least effort.

Lucero makes agent performance deficiencies or achievements easy to recognize. Agent awareness, follow-up and efficiencies increase with Lucero tools. One report will even identify agents who may be planning to leave the company.

“The ease — the reports...”

Colleen Iddings, CFO at Coldwell Banker Walter Williams Realty in Orange Park, FL, is a 12-year user: “The ease of the program and the reports we get help us manage 220 agents.

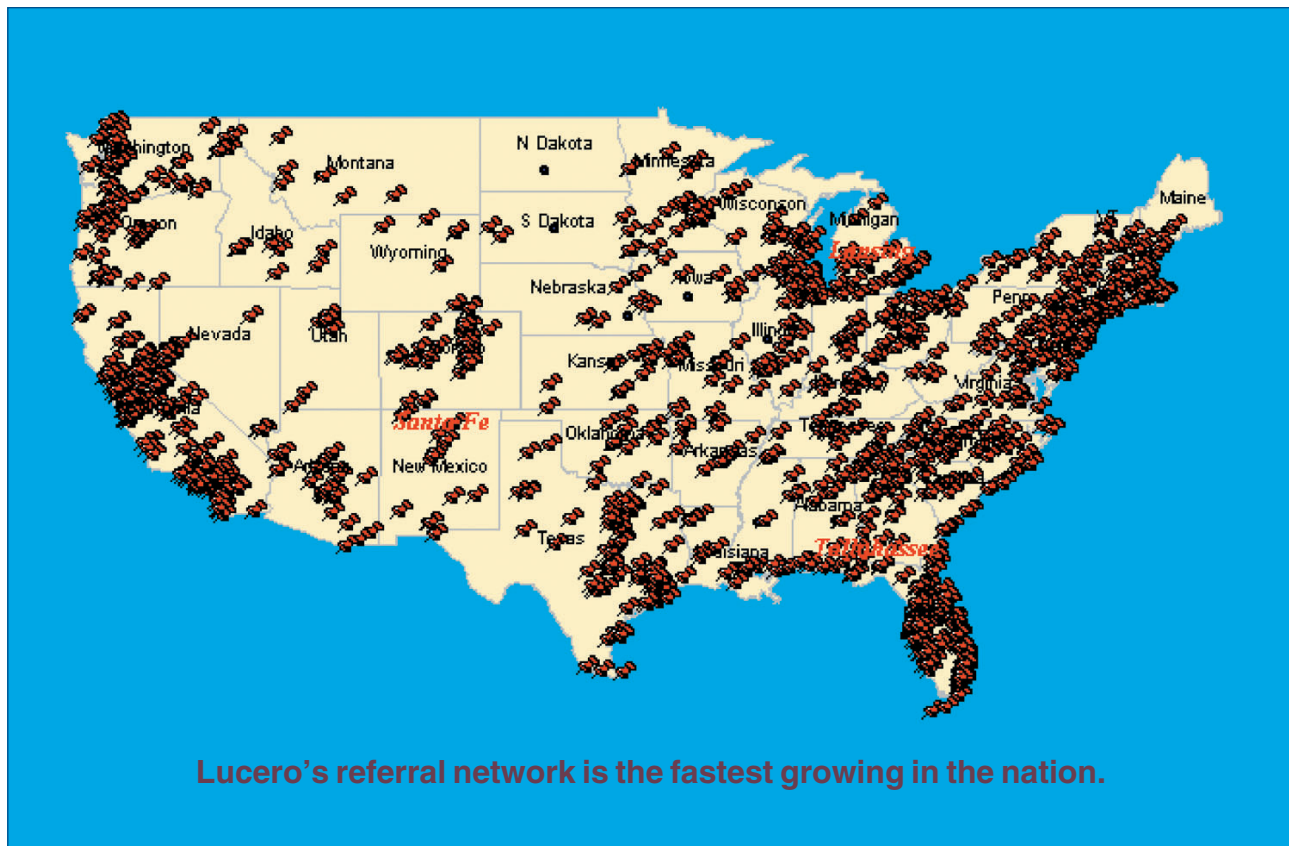
The way Lucero breaks out information allows us to work with our managers to improve the profitability of every office. When you deal in such a large volume of real estate sales — and

Can You Answer?

If you can’t answer these questions with the click of a button, you need Lucero:

- What agents are producing the largest share of company dollar?
- What is my cash flow for today — and the future?
- How is the company doing in 17 key areas compared to a previous period?
- Who is best at handling outside referrals? Company-generated referrals?
- Are my advertising dollars being spent wisely?
- What is happening to all of our leads?
- Are any agents planning to leave the company? When?
- What co-op agents work well with my company?
- Which agents have paid their bills?
- Which offices should I target for acquisition?
- Which agents need to be terminated?
- What is the status of all showings?
- What is due today for pending closings?
- From what zip codes are my buyers coming?

Lucero can also help you stay in touch with buyers/sellers; quickly and efficiently produce 1099s; create fair and balanced floor schedules; prepare information for sales meetings; and much more.



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commissions — you need to have all the information on the company dollar on a consistent basis, to make the decisions you need to make. Our decisions are based on information [from Lucero].”

Vinnie McAuliffe with the 85-agent Prudential Zack Realtors in Ship Bottom, NJ, appreciates the market edge he gets from Lucero. “The reports, especially agent/office production reports, let us know where we stand and which agents are doing the business. We use the cash flow report extensively. And Lucero adds valuable reports with each new build.”

Lucero gives instant access to the performance data of any agent, any office or the company as a whole. Brokers can analyze buyer and seller sources, area sources, financing types, property types, agent and office production histories, short and long term cash flow projections. Lucero provides the ultimate tools for productivity and a better bottom line with ease and confidence.

Fully-integrated, single entry front and back office functions — that’s Lucero. Besides analysis and reporting, one or two clicks can create an ad for a property, distribute leads, create a floor call rotation for multiple sites, mail-merge renewal letters, and automatically calculate commissions. The opening promise by Lucero demonstrators is: “For office management, anything you do by hand or in multiple software programs can be done with single entry in Lucero.”

“We’ve grown robustly without adding staff.”

In her Gainesville, FL, ERA Trend Realty office, Jan Bauer talks about Lucero’s role in making her company’s growth easier to manage: “Figuring commissions takes so little time with Lucero. We’ve been able to grow robustly

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without adding staff. We’re able to get data that was unavailable to us before. We didn’t have a back office management system, and the reports from the franchise software were worthless.

“We use [Lucero] for floor scheduling and the agents are using it for end-of-month production reports,” Bauer says. “We do all of our advertising and advertising tracking through Lucero.”

Bauer also believes Lucero adds tangible professionalism to her office: “I print an agent commission statement with every check, and they really like seeing that. It gives them their YTD income, YTD volume, commissions basis, as well as splits and any deductions, itemized right there for them.”

“One of the easiest software rollouts I have conducted.”

Jon Gudbrandsson, a new Lucero affiliate from New Millennium Real Estate in Brooklyn, NY, was impressed with Lucero’s ease-of-use from the beginning. “One of the easiest software rollouts I’ve conducted,” he says. “End users were very receptive and quick to catch on and there was surprisingly little handholding.” The basic Lucero training includes a personal trainer with four appointments over a twenty-five day period. Trainers help build the data in an online interactive environment.

Lucero can be up and running in a matter of days, not weeks. The professionals at Lucero Summit stay with new users every step of the way, assisting in data entry and accomplishing invalu-

able training during the rollout. Additional training is available onsite at affiliate offices or in rotating geographical regions of the country. Users also consistently comment on the excellence of Lucero’s technical support team.

Lee Shaw, Windermere Heritage on Camby, OR, recently changed his company’s office management software to Lucero. “It’s such an intuitive program and the switchover was much smoother and easier than anticipated.”

And, as for the Lucero pros, Chuck Doremus, Karpe Realty in Bakersfield, CA, says, “I found both the sales and support staffs patient and eager to help.”

“The last software you’ll ever need.”

Glenn Hunter, president of Lucero Summit Sales and Training, believes each potential affiliate should be aware of all other real estate office management software options before purchasing Lucero. “We created comparison guides in the past,” he says. “Then we discovered that a competitor might advertise a feature equivalent to Lucero, but its functionality, power, or ease of use was not equivalent, nor would it meet affiliate needs as completely as Lucero.”

Hunter always urges brokers and owners to gather information from other companies and pick the best. Then call Lucero for a side-by-side comparison. “If greater productivity, accountability, growth and profitability are what you strive for, Lucero is the last software you’ll ever need,” says Hunter. Lucero’s competitors are posted at www.lucerosummit.com. To learn more about Lucero, call toll-free 1-800-862-8193 and ask for a free demonstration-evaluation CD or visit the Web site. ■

— Andrea Personett

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Real Estate Office Management Software & Solutions
18 years, 80,000 users, 18 countries
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