

Data-driven, consumer engagement solutions helps the #1 real estate brokerage in southern Arizona attract seller leads and win listings.



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— Kevin Kaplan, Chief Executive Officer
Long Realty Company

CHALLENGE

The leading real estate brokerage in southern Arizona, Long Realty Company (Long Realty) prides itself on offering award-winning service that positively impacts the lives of the communities it serves. Also a member of an innovative family of companies that includes Home Services of America, Long Realty hangs its hat on providing its agents with top-tier technology that supports building relationships and closing deals.

In 2020, Long Realty CEO Kevin Kaplan was discussing business with colleagues when he learned about Percy, a platform that a sister mortgage company had been using to engage homebuyers with home valuation and equity insights. Years ago, Kaplan had adopted an automated home valuation tool to engage seller leads, but after seeing PercyHome in action and hearing about the platform’s average 401% ROI, Kaplan was deeply impressed. PercyHome, which delivers engaging real estate market demand and equity insights backed by consumer behavioral data, outshined the solution he had been using.

LONG REALTY COMPANY
TUCSON, AZ

BROKERAGE SIZE
28 OFFICES
800+ AGENTS

ROI METRICS
2021-2022

RESULTS

10,557
Seller Leads

RESULTS

1,448
Listings Signed

RESULTS

1,272
Total Closings
\$632M
Closed Volume

Visit us at [Percy.ai](https://percy.ai)

FOR MORE INFORMATION, CONTACT:
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RESULTS

Long Realty enhanced its corporate homepage and agent websites with PercyHome to engage seller leads with rich insights into their most pressing question: “What’s my home worth?” Implementing PercyHome’s private-labeled landing page has proven to be a powerful lead generating tool, attracting 38,000 consumer home valuation searches from September 2021 to date.

From these consumer searches, PercyHome generated 10,557 leads, which converted into 1,272 closings representing more than \$632 million in sales volume. As a result, Long Realty’s brokers earned more than \$17 million in additional commissions and Long Realty generated more than \$2 million in retained earnings.

TURNING AGENTS INTO MVPS WITH PERCYHOME

Customized with corporate branding and agent contact information, Long Realty’s landing page invites homeowners to enter their addresses to receive home valuation estimates from three different sources.

According to Kaplan, showing homeowners multiple home values provides agents with an opportunity to build rapport with clients and lead the home value discussion with educated, actionable data to win their business.

“The benefit of the agent having three values rather than one is that it leads homeowners to ask questions like, ‘Which one is right?’” said Kaplan. “This is exactly the type of interaction we want homeowners to have with agents because it exposes the limitations of the automated valuations they’ll come across online and showcases the value of Long Realty professionals, who are experts in their markets.”

The multiple home values provided by PercyHome are also very effective at engaging website visitors who are learning about Long Realty for the first time. Noting that home valuations are likely to vary by source, the landing page engages homeowners to request more information from a Long Realty agent, whose market expertise can paint a more accurate picture of what their home is worth. Also, each time a homeowner enters their address, PercyHome alerts Long Realty so its agents can connect with the lead early in the seller journey.

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**HOOKING HOMEOWNERS
WITH WEALTH-BUILDING INSIGHTS**

For the majority of Americans, their home is the most valuable asset. Surprisingly though, most people are not aware that the equity they build through homeownership can help them unlock financing and wealth-building opportunities. PercyHome hooks homeowners by breaking down their equity and showing how it can be used to achieve financial goals in several different ways.

First, PercyHome's Insights Report automatically calculates homeowners' home equity using a combination of publicly available mortgage data and an automated home valuation. If a household has been paying off their mortgage ahead of schedule, they can make an update to view accurate calculations by claiming to be the homeowner, an action that indicates greater interest in agent guidance.

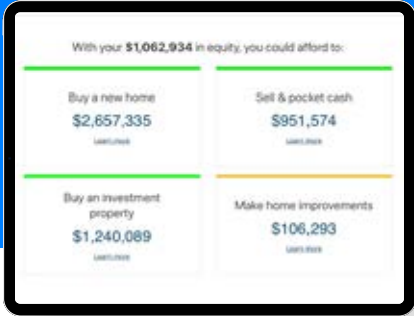
Then, using equity data, the Insights Report shows borrowers the outcomes of various mortgage payment strategies, including how much interest they would save over the lifetime of their loan by increasing monthly payments. What's more, the monthly report uncovers ways homeowners can use their equity to move up or downsize, finance the purchase of an investment property, make home improvements and more.

PercyHome's Insights Report even provides helpful insights that prime homeowners to think more seriously about next steps. For instance, a module showing the amount a homeowner could likely finance to make home improvements lets them know that equity used for home improvements is tax deductible in many cases, the highest value improvements they could make and the lowest value improvements they could make.

**MAXIMIZING MORTGAGE REFERRAL AND
CO-MARKETING OPPORTUNITIES**

PercyHome's Insights Report is co-branded with HomeServices of America company, Prosperity Home Mortgage. Alongside equity insights, the report enables homeowners to contact a Prosperity Home Mortgage loan officer for information on financing options. Referring leads to Long Realty directs borrowers to a mortgage lender it trusts to provide excellent service while also strengthening professional relationships that can lead to more business.

PercyHome's Insights
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Long Realty has also increased utilization of its QuickBuy® Immediate Offer program—which gives homeowners the convenience of a cash offer—by co-marketing it alongside its Insights Report.

“Showing our QuickBuy program alongside home valuations gives homebuyers multiple pathways for selling depending on their situation,” said Kaplan. “Having different messages to engage sellers in a conversation about their options also helps agents educate and build trust.”

PROPRIETARY BUYER HEATMAP INSIGHTS

PercyHome further positions Long Realty agents as real estate knowledge brokers by giving sellers proprietary insights into market activity in their area. A **Buyer Heatmap** illustrates real estate search volume by zip code, and graphs reveal search volume by price range and number of bedrooms. The HVS even provides sellers with insights into supply-side trends, such as the number of nearby homes sold in the last quarter and the amounts that similar houses recently sold for.

WINNING MORE LISTINGS WITH A BMA

PercyHome’s **Buyer Market Analysis** (BMA) equips Long Realty agents with another tool for winning listings. By integrating with Long Realty’s Comparative Market Analysis (CMA) system, PercyHome’s BMA can turn stale CMA data into client-friendly presentations by bridging the gap between historical comps and real-time buyer demand and activity. As a result, agents are positioned as knowledge brokers and able to price homes accurately so that listings close quickly.

In 2022, Long Realty agents generated 2,417 listing presentations by leveraging PercyHome’s Buyer Market Analysis data.

AUTOMATED NURTURE AND RETENTION CAMPAIGNS

Distributing monthly insight report emails have enabled Long Realty agents to win more listings as well as support client retention and referral business. That’s because providing prospects and clients with valuable information about their home’s worth on an ongoing basis increases the likelihood they will reach out to a Long Realty agent when they or someone they know is ready to list their current home and purchase a new one.

A Buyer Heatmap illustrates real estate search volume by zip code, and graphs reveal search volume by price range and number of bedrooms.



“I’ve always felt that since consumers get monthly statements on asset and investment accounts, they should also receive monthly statements about their house,” said Kaplan. “Monthly PercyHome reports show people how their home, which is likely their largest asset, accumulates equity over time. What’s more, similar to the way many banks engage customers with budget breakdowns, monthly reports engage homeowners with market stats and PercyHome’s proprietary Buyer Heatmap that opens the door for agent conversations.”

Long Realty recognizes that its agents have developed differing client outreach preferences that match their unique service styles. Percy’s flexibility gives agents control over how they distribute PercyHome reports while at the same time supporting automation to reduce rote tasks. There are three ways homeowners can be subscribed to monthly PercyHome reports. Homeowners can self-subscribe to monthly reports when they view the landing page powered by Percy. Agents can subscribe individual homeowners to monthly reports. Additionally, Long Realty Jim Adams Director of Digital Services Strategies has made it easy for agents to automate monthly report enrollment at scale.

“To provide our agents with the relationship-building capital of nurture and retention marketing campaigns without weighing them down with the administrative burden of list management, we’ve introduced the option for agents to opt-in to automated, rule-based client enrollment,” said Adams. “By clicking a box, agents can enroll all buyer-side closed transactions clients from the past year and all future buyer-side transactions in monthly home valuation report emails. Our goal is to make it easy for our agents so they can spend more time doing what they do best: helping clients buy and sell their homes.”

Today, Long Realty reports that 4,985 clients are enrolled in PercyHome reports, and that number is growing.

ABOUT PERCY

Percy is a provider of data-driven consumer engagement solutions for real estate brokers and mortgage lenders. Harnessing the power of real-time consumer behavioral data collected from thousands of data points, Percy helps keep prospects and clients close across the homeownership journey by showcasing wealth-building opportunities and actionable housing market insights. More than 150 U.S. real estate brokers, including nine of the top 10 brokerages, and over 500 loan officers rely on Percy to differentiate themselves with data and transform insights into business results.

PERCY^{AI}

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