

Texas REALTORS® 2021-2022 Strategic Plan Review





*"The secret to getting ahead
is getting started."*
-Mark Twain

Agenda

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Why a Strategic Plan?

2

Planning Process/Staff Involvement

3

Mindset & How to Approach Strategies

4

Silos v Cross-Functionality

5

Review Plan

6

Review Breakouts

Why a Strategic Plan?

*Someone's sitting in the shade
today because someone planted
a tree a long time ago.*

- Warren Buffet



Why a Strategic Plan?

Set Priorities

Establishes key goals for the next two years - serves as a guiding document for committee and board action

achieve
objectives to
goals. noun
ambition
endeavor

Communicates Value

Makes a statement to members about how Texas REALTORS is providing value and service that serves them in an ever-changing environment

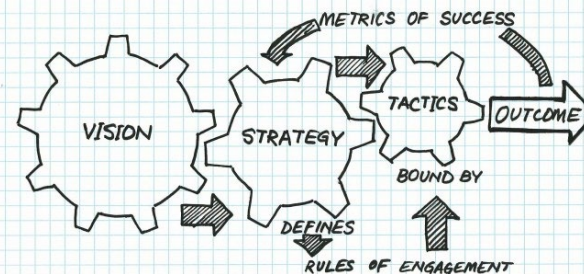


 TEXAS REALTORS

**2022-2024
BUDGET**

Drives the budget

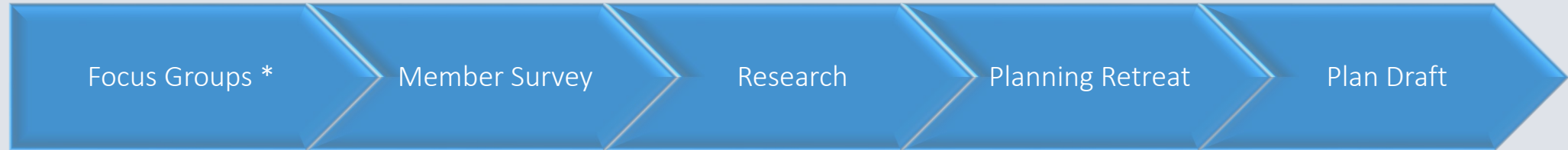
Strategic plan drives the budget, the budget drives the resources



Not a comprehensive listing of programs and services

Sets priorities but is not exhaustive – Keeps us focused on key areas and sometimes new initiatives – Sets boundaries to make highest use of finite resources

*If you don't know where you are going,
you'll end up someplace else.*
- Yogi Berra



Process and Staff Involvement

Mindset

How to Approach Plan Strategies

What to keep in mind as we review each plan component

We have a strategic plan. It's called 'doing things'.

- Herb Kelleher

What does it mean? Where does it come from?

What does success look like?

What are we currently doing that relate to the goal?

What are we not doing?

Does it call into question the value of other programs/services?

Do we have the resources to accomplish these items? People, budget?

If not, do we need to re-prioritize activities?

What's the return on investment and return on engagement of current and proposed activities?

How do we measure success and progress?

Silos vs. Cross-Functionality

Think outside of your department

Who are the right people for the team?

Purely departmental? Probably not –When is the right time to include others?

Cross functional teams help organizations put their customers first, by encouraging effective communication across teams.

Some benefits of cross functional teams include:

- Improved coordination across functional areas
- Increased innovation in product and process
- Reduced cycle times for key customer touchpoints

- Planview



We advance Realtors® and the communities we serve through advocacy, professionalism, and resources.

OUR BRAND PILLARS



Advocacy

Advocate for Texas REALTORS® and private-property consumers.

Represent Texas REALTORS® and consumers at the local, state, and federal levels to protect property rights and promote a strong real estate industry.



Professionalism

Provide a path to superior client service

Set a foundation for dependability, integrity, and high standards so members and their clients can achieve success.

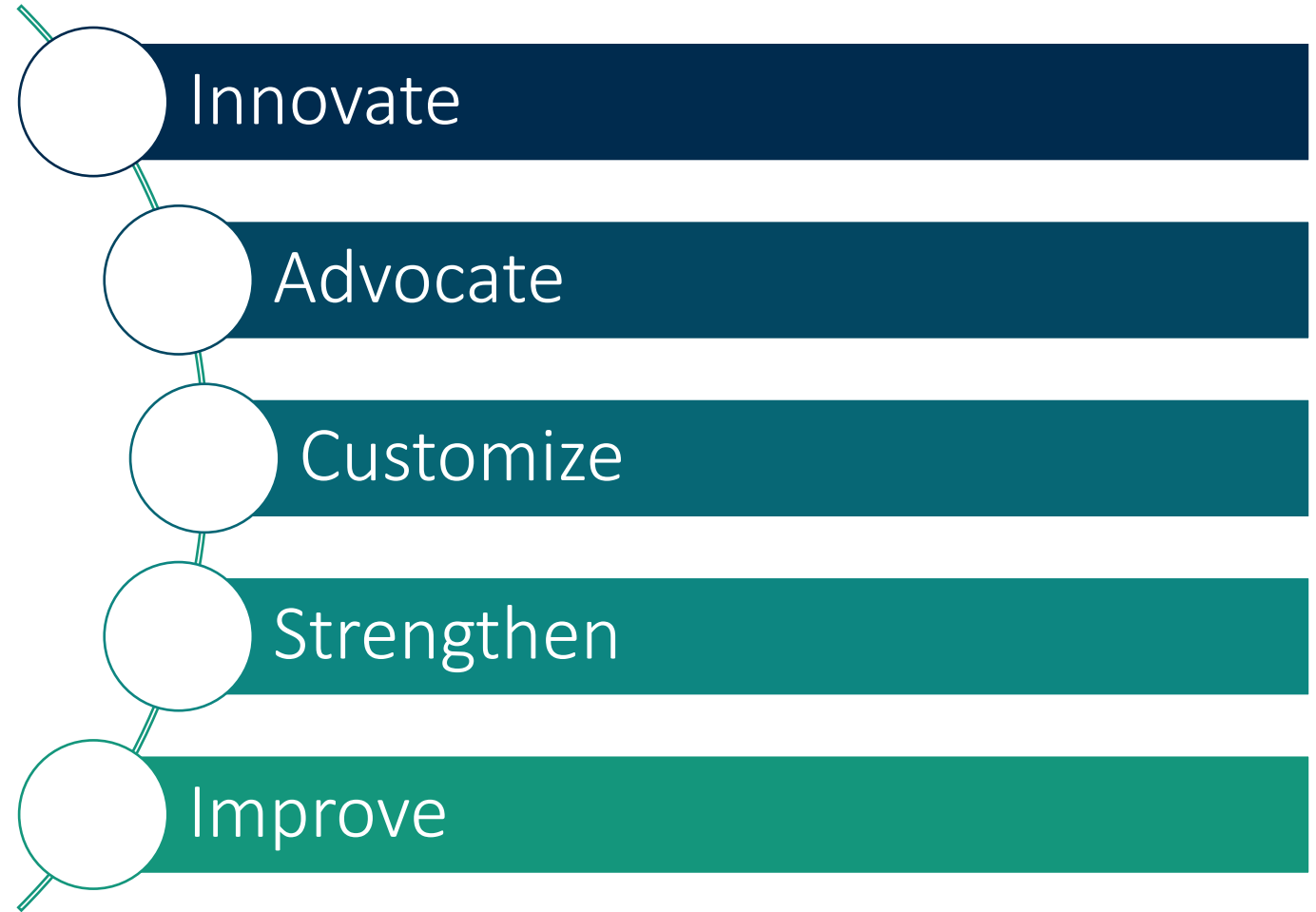


Resources

Help REALTOR® businesses operate efficiently and profitably.

Forge strong relationships in the industry, maintain a culture of continued learning, and deliver services and tools that enhance the relevance of members.

<https://www.texasrealestate.com/about-us/who-we-are/governing-documents/>



Innovate

- Identify member and consumer challenges that Texas REALTORS® is uniquely positioned to address through data resources. Use strategic partnerships to provide the data to address these opportunities.
- Showcase innovative real estate technologies at events outside the real estate industry (such as SXSW).
- Assess partnership options with Second Century Ventures and tech start-ups to promote new technologies that help members achieve success and enhance their delivery of services.
- Incorporate tools, speakers, and trainings at Texas REALTORS® meetings to provide members direct access to new technologies and deliver innovative meeting experiences.

Advocate

- For statewide events, explore adding consumer-facing activities related to fair housing and housing attainability.
 - Incorporate legal, business, MLS, and technology concerns into legislative priorities.
 - Examine the feasibility and value of a REALTOR® Advocate certification program.
 - Coordinate advocacy and communication efforts with affiliated and multicultural organizations.
 - Clearly define advocacy roles for TREPAC, Issues Mobilization, Public Policy and Political Affairs. Create a more-cohesive overall advocacy messaging.
- Create tools to make it easy for brokers to share information through their channels.
 - Leverage IT resources to capture valuable data and create more efficient systems.
 - Develop a successor to “Good to Great” and “Breaking New Ground” that focuses on regulatory and consumer strategies.
 - Communicate to members and consumers the value of the association’s advocacy efforts.

Customize

- Partner with allied organizations to meet inclusion goals.
- Streamline the volunteer process to make it easier and further integrate it with the member database.
- Use internal and publicly available data to deliver customized, relevant information to and engagement opportunities for members.
- Leverage data to improve volunteer recruitment strategies and to increase inclusionary initiatives.
- Enhance the capabilities of our communication technology to create personalized relationships with members and offer suggestions based on previous behaviors and data.

- Engage members with messaging that meets their delivery expectations.
- Explore opportunities to partner with NAR and local associations to share membership information to enhance member experiences and deliver information and services to members based on areas of interest.
- Utilize the shared information to improve the committee volunteer process.
- Improve functionality, usability, and automation of member profiles on texasrealestate.com.
- Conduct ongoing focus groups to gather member information and improve programs, products, and resources.

Strengthen

- Conduct focus groups and surveys to identify brokers' needs and priorities. Use that information to create a strategy to deliver direct services to brokerages.
- Partner with local associations to enhance broker participation in Texas REALTORS® initiatives.
- Conduct forums/education/breakouts/networking at association events targeted to brokers.
- Engage brokers in the forms-development process.
- Consider creating a broker advisory committee or task force.

- Seek broker input and feedback on regulatory matters.
- Leverage NAR's Broker Involvement Program when applicable to Texas REALTORS® initiatives.
- Develop a plan for direct outreach from the association's Leadership Team to brokers.
- Improve direct communication with brokers on the impact of Texas REALTORS® advocacy initiatives.
- Provide related content easy for brokers to share with their agents.

Improve

- Conduct consumer and member research to define important aspects of professionalism.
- Identify ways to enhance the utilization of the professional standards process.
- Develop a comprehensive plan for educating consumers on fair housing.
- Work with TREC to ensure consistency in enforcement of rules and regulations.
- Ensure consistent, high-quality delivery of professional development courses by Texas REALTORS®-certified instructors.
- Consider establishing a Texas REALTORS® designation with an emphasis on professionalism.
- Explore mentor/apprentice programs to enhance members' professionalism.
- Research legislative opportunities to strengthen professionalism in the industry.

- Expand use of C2EX through promotion, incentives, and recognition.
- Consider implementation of a recognition/incentives program for those who go above and beyond.
- Encourage affinity group leadership participation in the Texas REALTORS® Leadership Program (TRLP).
- Establish a greater understanding of all REALTOR® business models through provision of clear information and meaningful relationships with brokers.
- Develop a drip campaign focused on material from TREC's Legal I & II to reinforce concepts from those courses throughout the member license cycle.
- Promote the value and accuracy of the MLS to consumers.
- Communicate with consumers that REALTORS® offer a wide array of business models, services, and buying platforms to help them achieve their real estate goals.

Innovate

Identify member and consumer challenges that Texas REALTORS® is uniquely positioned to address through data resources. Use strategic partnerships to provide the data to address these opportunities.

Showcase innovative real estate technologies at events outside the real estate industry (such as SXSW).

Assess partnership options with Second Century Ventures and tech start-ups to promote new technologies that help members achieve success and enhance their delivery of services.

Incorporate tools, speakers, and trainings at Texas REALTORS® meetings to provide members direct access to new technologies and deliver innovative meeting experiences.

+ Add a card

Advocate

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Clearly define advocacy roles for TREPAC, Issues Mobilization, Public Policy and Political Affairs. Create more-cohesive overall advocacy messaging.

Create tools to make it easy for brokers to share information through their channels.

Leverage IT resources to capture valuable data and create more efficient systems.

Develop a successor to "Good to Great" and "Breaking New Ground" that focuses on regulatory and consumer strategies.

Communicate to members and consumers the value of the association's advocacy efforts.

+ Add a card

Customize

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Enhance the capabilities of our communication technology to create personalized relationships with members and offer suggestions based on previous behaviors and data.

Engage members with messaging that meets their delivery expectations

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+ Add a card

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Conduct forums/education/ breakouts/networking at association events

Engage dev

Conduct

See reg

Leve

Pro

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+ Add a card

Improve

Conduct consumer and member research to define important aspects of professionalism.

Identify ways to enhance the utilization of the professional standards process.

Develop a comprehensive plan for educating consumers on fair housing

professionalism.

Research legislative opportunities to strengthen professionalism in the industry.

Expand use of C2EX through promotion, incentives, and recognition.

Consider implementation of a recognition/incentives program for those who go above and beyond.

Encourage affinity group leadership participation in the Texas

+ Add a card

+ Add another list



Breakout Exercise

workspace visible

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Identify ways to enhance the utilization of the professional standards process.

in list [Improve](#)

MEMBERS



Description

Add a more detailed description...

Activity

Show details



Write a comment...



Kinski Moss Jun 9 at 7:31 PM

Recently, we have updated the pathway for filing a complaint because it was too complicated on our website. We have also adopted the CasePro filing system to make filing a complaint easier.

👍 - [Reply](#) - [Delete](#)



Kinski Moss Jun 9 at 7:29 PM

Create a marketing campaign regarding the process of filing a complaint.

👍 - [Reply](#) - [Delete](#)



Kinski Moss Jun 9 at 5:06 PM

Continue to update the professional standards information (ethics and arbitration) on the website to simplify the complaint process.

👍 - [Reply](#) - [Delete](#)

SUGGESTED



Join

ADD TO CARD

Members

Labels

Checklist

Dates

Attachment

Cover

Custom Fields

Add dropdowns, text fields, dates, and more to your cards.

[Start free trial](#)

POWER-UPS

+ Add Power-Ups

AUTOMATION



+ Add button

ACTIONS

→ Move

📄 Copy

📄 Make template

👁 Watch

📁 Archive

↗ Share

+ Add a card



Consider implementation of a recognition/incentives program for those who go above and beyond.

Texas REALTORS® 2021-2022 Strategic Plan Review

*"Strategy without tactics is the slowest route to victory,
tactics without strategy is the noise before defeat."*

-SunTsu

