

750 Referrals a Year: A Solo Agent's System to Sky-High Profit

From Flor de Maria McNally

Flor de Maria McNally is a top-performing real estate agent in West Chester, OH where she closes 120+ units a year while raising five kids (#6 on the way!) under eight. Her business is built on a consistent, personal referral system that runs one perfect experience, thousands of times.

1 Learn to Listen First

She asks herself three questions often:

1. How do I create surprise and delight moments for my clients?
2. How do I make this consistent and duplicatable?
3. How do I make this more streamlined?

2 Collect Complete Data

Just like a doctor asks you for your information before an appointment, Flor sends each client a Google Form to complete. Each Google Form submission triggers:

1. Auto-import into CRM, Google Sheets, and ClickUp.
2. A custom CRM workflow (Flor uses Command SmartPlans).
3. A "Thank You" text and email.

PRO TIP: Use Send Blue to text from a shared iMessage platform so VAs can respond without losing authenticity.

7 Google Form Essentials:

1. Full Name
2. Phone Number
3. Email
4. Home Address
5. Birthday
6. Marital Status
7. Facebook Profile

3 Manually Add Important Info

Each new contact gets manually assigned to a SmartPlan in Flor's CRM based on their timeline to transact — 90 days, 4 months, 6 months, 9 months, or 1+ year – and the person who referred them (if applicable).

4 Own Two Important Days

Flor's branding never appears on gifts or cards. She says, "If it's about me, it's marketing." Every person in her 7,500-contact database receives:

1. Custom Photo Birthday Cards (sent via Mailbox Power):
 - Photos are pulled from clients' social media.
 - Each card has a new note written annually by Flor.
2. Home Anniversaries (tracked via ClickUp):
 - Year 1: Mug with a family photo in front of their home.
 - Year 2: Engraved cutting board.
 - Year 3: Personalized coasters.

Flor's system of high-touch consistency, thoughtful data collection, and zero-marketing surprises turns every client into a lifelong referral source.



TCPA Reminder: Remember to comply with the TCPA and any other federal, state or local laws, including B2B calls and texts. Never call or text a number on any Do Not Call list, and do not use an autodialer or artificial voice or prerecorded messages without proper consent. Contact your attorney to ensure your compliance.



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