

REWW

REAL ESTATE WORLDWIDE



How a Premier Real Estate Education Company Makes Quicker Marketing Shifts With More Accurate Data



SEGMETRICS

Meet Real Estate Worldwide

Real Estate Worldwide (REWW) is a premier real estate education company founded by Kent Clothier, one of the most successful real estate investors, educators, and speakers in the United States. REWW offers entrepreneurial-focused education products and services and helps thousands of entrepreneurs create wealth using powerful and proven real estate investment systems and solutions for lead generation, deal acquisition, automation, and scaling.

Like any growth-oriented company, REWW needs to closely track their key performance indicators (KPIs) and understand what is driving the numbers.

The team was finding it increasingly difficult to do this, says REWW Project Manager Kathleen Pince. The CRM data wasn't easily accessible in Infusionsoft, they were using hundreds of Google spreadsheets across several departments that required manual updating on a daily basis, and they had differing methodologies between departments for how certain numbers were pulled and tracked.



The process was time-consuming, prone to human error, and made it difficult for the company to compile accurate data.

"It got to be a little bit messy. We had so many different documents and equations that were pulling in from one document to the other — from the marketing department sheet to the sales sheet for example. If one of those numbers was off, then all the numbers were off."

— Kathleen Pince, Project Manager, REWW

Although there is always some hesitation around introducing yet another system for team members to learn, REWW turned to SegMetrics to provide a central platform to pull together all the moving parts of their systems and provide a clear, concise and accurate view of all their KPIs.

Getting visibility into key KPIs at a glance with custom dashboards

As part of the premium support included in our Business Plan, the SegMetrics team started by helping each of REWW's departments better understand how their data was used by other departments and getting everyone on the same page for how that data would be pulled into the system.

To give the different departments within REWW easy access to the relevant data they need to track, the SegMetrics team built out custom dashboards for each of them.

The marketing department's dashboard, for example, tracks raw metrics such as new leads, buyers, and signups as well as more complex performance indicators such as return on ad spend as it compares to sales-call assisted sales and other marketing sales.

The sales department's dashboard has metrics such as total sales and breakdown of how far prospects go down the sales process funnel. The dashboards also continually track performance against monthly sales goals, giving the teams a daily reference of how far they have to go to meet the goals for that month.

Kathleen says the SegMetrics dashboards make it much easier for REWW managers to quickly get an overview of key performance measures.

"You can just see everything that you want to see without having to dig into the details or look up any numbers on a daily basis. You just automatically have them ping on your dashboard. It's nice to have the big picture and then be able to get directly into a more detailed view when you need it."
— Kathleen Pince

She says getting set up has been easy and seamless from REWW's perspective, thanks to the support they've received from SegMetrics. They've particularly appreciated the availability to



answer questions or concerns, as well as the live demos and further customization of the software to meet the company's needs.

Being able to more quickly make shifts in marketing based on more accurate data

By using SegMetrics to pull data directly from Infusionsoft and other sources, the REWW team not only has a clear daily screenshot of where money is being spent and where sales are coming from, but they can trust that the data is accurate.

Kathleen says that being able to more quickly and accurately pinpoint what's causing fluctuations in their sales allows them to double down on what's working in their marketing and test out approaches to fix what isn't, which has a huge impact on the business.

"We're able to shift quicker, which is especially crucial with everything going on with COVID-19 in the ever changing landscape that we're in now. By seeing the numbers, we know when to shift, first of all, and then we're able to see what effect the shift is having. It's a good investment to have for your company to be able to get a really good picture of everything that's going on. It's been really impactful for us."

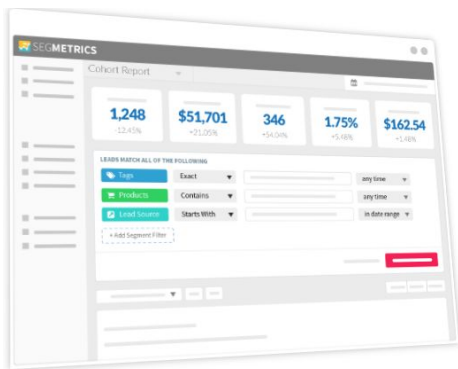
— Kathleen Pince

Improve Your Marketing with SegMetrics

Understand your whole Customer Journey

Every action a lead takes gives you valuable marketing data. The impact of your marketing depends on how easily you can gather the key metrics for your funnels. See every purchase, page visit, clicked ad, and more – and lets you see it all with the click of a button.

Define your cohorts based on what your customers are doing through the marketing funnel, and find the segments that make you money, and those that don't. Go beyond top-level dashboards to find your most valuable cohorts.



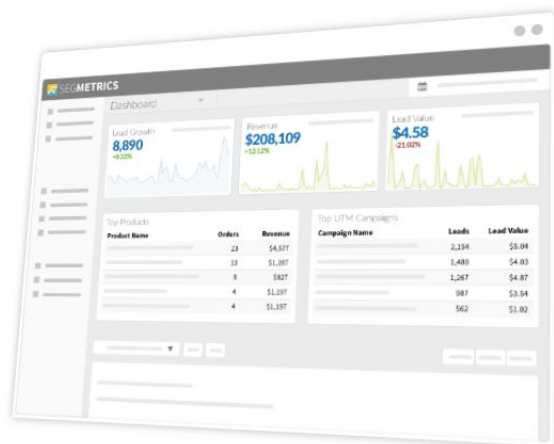
Analyze and optimize with explorative reports

As marketers, our most impactful insights come from those “Huh, that’s weird” moments. SegMetrics’ explorative reports lets you filter and break down your cohorts in realtime, letting you find the segments that are working, and the ones that aren’t.

Once you’ve identified the cohorts you want to monitor, save your reports, or put them on your live dashboards to keep tabs on their performance.

SegMetrics deciphers the data so you don't have to.

We built SegMetrics to be reliable, simple to set up, and easy to read. Because no matter the size or type of your business, success shouldn't depend on wrestling some sense out of confusing or conflicting data. Get back to making clear-headed, informed decisions. We'll handle the numbers.



Build your unique KPI dashboard

What gets measured gets improved, and the more visible, the more they improve. SegMetrics' dashboard and team features keep your core KPIs at top of mind, and alert you if things start to slip.

Whether you need to keep a close eye on MRR, quickly get the Lead Value of all your sources, or monitor leads as they go through your funnel – SegMetrics fits your reporting needs like a glove. Build custom dashboards in just a few clicks and get the vital data you need to improve your marketing.



Looking for an accurate compass to guide you on how to best spend your marketing dollars?

[Try SegMetrics for free for 14 days](#) and see how it can help you find the hidden profits in your marketing funnels.

Customer Voices

“SegMetrics has helped us get way more value out of Infusionsoft and provided reports that we could only dream of in IS. If you want to know where the opportunities are hiding in your customer and subscriber data, SegMetrics will show you.”

Evan Tardy — President of Axe Wellness

