



— CASE STUDY

JBGoodwin simplifies agent recruiting and onboarding.

37%

increase in sponsored agents since Copper activation

300%

increase in outbound recruiting emails through Copper since activation

200%

increase in outbound recruiting text messages through Copper since activation

JBGoodwin Realtors

Founded in 1972, JBGoodwin Realtors helps homebuyers, sellers and renters find the perfect match to fit their needs. With seven offices and 850 agents, JBGoodwin is a big player in the Texas real estate market.

JBGoodwin constantly recruits new agent partners to continue growing their team to better serve the Austin and San Antonio communities. Consistent with their mission to “Help People,” the company functions as one large, supportive family, offering a nurturing environment for new and experienced agent partners as they develop their real estate careers.

With ongoing training and coaching as agent partners grow at JBGoodwin, individuals are equipped with the support and resources they need to become valuable team contributors. Their mission makes recruiting a foundational part of their business model.

We sat down with JBGoodwin’s Director of Technology, Edward (Ed) Tull, to learn all about how Copper helps simplify and enhance their recruitment process.

Recruitment is messy without a process

For years, JBGGoodwin didn't have a CRM for recruiting, but things quickly got messy as they continued to grow. After opening more branches and investing additional resources into recruiting, it became difficult to track recruiting through a fractured system of spreadsheets, emails and handwritten notes.

So they tried Salesforce. But even with a paid consultant, the cumbersome platform was hard to customize for all stages of their recruiting process and offered few no-code integrations with the apps they used most frequently. Still, at the very least, they needed a tool to manage the contact details of the growing numbers of applicants they were receiving. So, they then moved on to a stripped-down, single-seat contact management system for their recruiter to use, which was little more than a cloud-based spreadsheet. They discovered very quickly, though, that collaboration between team members was more of a necessity than they'd previously thought.

The recruiter could operate in this pared-down system fine, but as soon as a recruit moved into the interview stage, everything became disorganized. All team members communicated via emails, but emails got lost, and important details and directives fell through the cracks. The company started losing track of interviews, onboarding and training. All involved began to experience confusion and frustration.

They needed a solution to track and automate processes along the entire workflow from recruitment through onboarding, and the light, one-person CRM wasn't cutting it, either. But the team knew that going backwards to an overly complex platform like Salesforce wouldn't solve their problems.

JBGGoodwin was looking for a needle in a haystack: A more robust solution that sat somewhere in the middle, offering more functionality and customizability than a single-seat system, without the added complexity and bulkiness of an enterprise-level CRM. Did this unicorn even exist?

Well, three years ago, they decided to give Copper a try.





Using Copper to organize and automate recruitment

JGoodwin was already heavily invested in Google Workspace, so it made sense to go with a solution that would easily integrate into their regular workflows.

The team first started using Copper with the primary intention of streamlining the recruiting process for both the Recruiting Director, Scott Peck, and the interview managers. But as the company continued to grow and added a training manager to the mix, they started taking advantage of Copper's pipelines to build out their recruiting process from start to finish.

The JGoodwin team has now used Copper to build:

- A **recruitment pipeline**, which follows a lead from an interview all the way to post-interview follow-up.
- From there, the lead is moved into the **interview process pipeline**, where recruits are either "won" or "lost." Once a recruit is won, it's automatically closed and copied into the onboarding pipeline.
- The **onboarding pipeline** follows the person from a "welcome-to-the-team" communication through paperwork and finally into a "ready-for-training" status. Right before a new training course is about to start, the training manager goes into Copper, applies filters, and sees who's ready for training.
- Then, they're moved to a separate **training pipeline**. training director, Beth Rothenbury, only communicates about and with trainees from within Copper.

She attaches Google Meet reports to Copper records and takes notes inside the CRM to keep things seamless and organized.

- Finally, the agent's record is moved into a **productivity pipeline**, where new hires work with Stephanie Perez, their productivity coach, throughout their first year. The productivity coach meets with all agents virtually for one-on-one coaching and adds notes on each individual inside of Copper, recording trouble areas and successes.

By creating these various pipelines, JGoodwin can follow each recruitment lead from beginning to end.

"We really use Copper as a single source of truth to track everything all the way through."

Edward (Ed) Tull,
Director of Technology



Using Copper, they're also able to calculate:

- **The number of people they interview**
- **The number of people they talked to and would like to hire**
- **The number of people they won**
- **The number of people they lost, with a note on why**

These numbers make improving their recruitment process much more straightforward.

Adding more functionality as the company grew

But JBGoodwin didn't stop with pipelines. In 2019, they hired a VP of marketing, who worked with Ed to set up new automations within Copper.

Using Copper's native integrations and Zapier, JBGoodwin now automatically sends professional email campaigns via MailChimp and text messages via Just Call IO when specific triggers occur. JBGoodwin leadership can send a text message to a new hire directly from the agent's record in Copper.

- **All JBGoodwin recruits receive a personalized text message the morning of their exam from the trainer's cell number that says, "Good luck on your test, [First name]."**

On the integration capabilities, Ed notes:

"The nice thing about Copper is that it opens up to most tech platforms, so it's really easy to customize. I don't have to say, 'no,' very often, and that's a definite plus."

Results worth celebrating

All the pipelines and automations have improved JBGoodwin's recruiting outcomes notably. Since 2019, they've experienced a 37% increase in quality, sponsored agents ("agent partners").

In the first seven months of 2021, they sent 6,000 automated text messages and 12,000 emails using automation and integration with Just Call through Copper—and the fact that they have the data to prove it is a win in itself.





Previously, JBGoodwin didn't have a system to keep track of recruiting texts or phone calls. In those days, one person made all the calls, sent texts, and followed up with some emails here and there. Documenting all—or even some—of these communications became nearly impossible. So they didn't. It was just too much administrative work for a single person to keep up with, especially with other more critical responsibilities on their plate.

Now, thanks to Copper, they're able to track all their phone calls, texts, emails and notes relating to each opportunity.

And they're finally able to put in place the process they always needed: an efficient system for tracking recruiting leads, the interview process, the onboarding process, the training process and beyond.

Always looking ahead: what's next?

A true Copper champion, Ed has big plans for continuing to use Copper to the benefit of JBGoodwin.

He's already built out an "Active Agent" stage to use for retention beyond the first year. Once it's launched, sales managers will be able to manage their respective 150 agents via this pipeline to keep agents engaged and on track.

He's also excited about ramping up Copper's new email templates and reporting tools. While his process for these newer features is still evolving, he's had some great wins with Copper's Reports.

Using Copper's new Reports suite:

- Ed has been able to illustrate recruitment successes with the Owner and Broker.
- And, even more impressive, he's also used Copper Reports to take multiple reports off the Recruiting Director's plate.

Copper's reporting tool automatically takes care of many of them, even sending an automated PDF export of a report showing the current numbers to the team each week.

JBGoodwin hopes to automate more processes to increase efficiency further. The next steps hinge on internal adoption, which can be a hurdle, but the team feels confident that with Copper's easy-to-use features, their new pipelines and automations will create even more stellar returns in the future.

Improve your recruitment results, too.

Designed for relationship-centered businesses, Copper functions seamlessly in the background while you spend time on what matters: people. We're the fast, beautiful and easy-to-use CRM that your team will love.