

THE TERCERO AGENCY

Final Storytelling Package

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Part 1: Strategic Context & Analysis

1. Brand Foundation & Goals

Brand Snapshot:



The Tercero Agency is a real estate team based in Santa Fe, New Mexico. They are lifelong locals guide clients in buying and selling homes with services that include marketing and video production.

Audience Insight:

Primary Audience consists of community-focused homebuyers/sellers in the Santa Fe area who see a home as a cultural and emotional anchor rather than just an investment. This group includes established local families, professionals relocating to Santa Fe for lifestyle reasons, and owners of legacy properties who value preservation and story. Ages range from 30-65.

Attitudes for these individuals and families include priority on authenticity over material flash, they distrust overly salesy marketing and prefer an advisor who listens first. They value local expertise and expect agents to understand the ins and outs of the neighborhoods, the history, schools, municipal details, and lifestyle tradeoffs. They're pragmatic, but emotional. They want a smart financial decision that fits their expectations for family and lifestyle. Many are either very proud of or very drawn to Santa Fe's cultural identity and want a realtor who will protect that sense of place.

They **value** community and relationship; they want to be part of, rather than buying into, a neighborhood. Heritage and legacy are important to these individuals, preserving history, architectural character, land, and family. They value a professional with expertise who is reliable and empathetic. They value transparency, straightforward communication, clear timelines, realistic market assessments, and no surprises.

Emotional needs the Tercero Agency must satisfy:

1. Trust and reassurance: individuals need confidence that the agent will protect their financial and emotional interests.
2. Belonging: individuals need to feel welcomed into a community.
3. Pride and affirmation: they want to feel proud of their home choice and know it reflects their values.
4. Calm through complexity: buying or selling should feel guided and manageable, not chaotic.

How?

The Tercero Agency should show up:

- As a neighbor first, transaction expert second. Local stories, household-level empathy, and deep local knowledge.

- As a thoughtful translator of the market. Clear guidance without pressure, data, and human context.
- As a curator of lifestyle and legacy. Marketing that sells the life in the home, not just the square footage.

SWOT Analysis:

Strengths

- The Tercero family's story and long-standing Santa Fe presence demonstrate authenticity and trust.
- Experience with meaningful volume and high-end listings.
- Relationship-driven approach and emotional intelligence that aligns with the primary audience's values.
- Hyperlocal knowledge and network, community connections, familiarity with neighborhoods, local vendors, events, etc.
- Differentiated marketing style that emphasizes storytelling and the life lived in a home rather than a generic listing.
- Community engagement (client appreciation events, local partnerships)

Weaknesses

- Potential perception as a boutique/local-only firm. May limit visibility to out-of-area buyers without targeted outreach.
- If digital presence or SEO is inconsistent the brand could underperform for shoppers researching Santa Fe remotely.
- Reliance on a few key team members for relationships and knowledge can create capacity or continuity risk.
- Internal processes or tech gaps.
- Messaging may be too much emotion/story for some investor or fast-transaction customers who want data-first communication.

Opportunities

- Expand hyperlocal content marketing: neighborhood guides, video tours, oral histories, and buyer/seller checklists for Santa Fe micro-markets, etc.
- Build referral pipelines to out-of-state buyers and remote workers through targeted campaigns.
- Package services for adjacent niches: downsizers, retirees, luxury sellers/buyers, historic property specialists, and eco-conscious buyers.
- Strengthen digital intake for remote buyers: 3D tours, high-quality short-form videos, and concierge showing services.
- Strategic partnerships with local artists, preservation groups, lenders, and relocation specialists to co-market and add credibility.

Threats

- Competition from national brokerages and platforms with larger ad budgets and tech tools that can outbid locally for online leads.
- Market volatility: interest rate rises, economic downturns, or regional price corrections that shorten buyer pools.

- Getting cut out by large tech-driven real estate marketplaces (Zillow, Redfin) that commoditize listings and price comparisons.
- Reputation risk: a single negative transaction experience or online review can harm a tight-knit local brand.
- Regulatory or tax changes affecting second-home purchase or short-term rental rules in Santa Fe could shift demand quickly.

Goal(s) for the Brand:

Goal 1: Increase emotional loyalty among local and relocating clients

The agency's core strength is relationship-driven service, empathy, and mastery. Stories that highlight care, understanding, and life-changing results will deepen emotional connection, ensuring clients feel valued beyond the transaction. Strengthening emotional loyalty also drives referrals, repeat business, and long-term community reputation.

How storytelling supports it:

Narratives will showcase client journeys that emphasize trust, guidance, and personal transformation, they will highlight team empathy and emotional intelligence in real situations, and reinforce that choosing the Tercero Agency is not just a transaction, but a life-long affirming decision.

Goal 2: Build credibility and perceived expertise across all market segments

While the agency excels in local knowledge and personal service, boutique perception and hyperlocal focus can create doubt among out-of-area buyers, investors, or first-time clients. Stories that demonstrate mastery and results can reinforce that the agency delivers consistent high performance across complex scenarios.

How storytelling supports it:

Narratives will show client outcomes that combine careful guidance with measurable success, position the agency as a trusted authority in Santa Fe's real estate landscape, and balance empathy with proof of results to appeal to analytical or cautious buyers.

2. Brand Attribute Assessment

Strong Attributes:

1. Mastery

Why it's powerful:

Gives the brand credibility. In markets where buyers and sellers are overwhelmed by noise, inconsistent information, and fast-moving conditions, a sense of grounded, long-term expertise is stabilizing.

Storytelling strength:

Mastery allows the narrative to show transformation. People go from confusion to clarity.

2. *Empathy*

Why it's powerful:

Real estate is inherently emotional: families are saying goodbye to homes, relocators face uncertainty, buyers dream of belonging. Empathy distinguishes the Tercero Agency by showing clients that they are understood as humans, not as transactions.

Storytelling strength:

Empathy creates resonance. Stories can highlight moments of listening, patience, emotional intelligence, and respect for personal histories.

3. *Results*

Why it's powerful:

Even with emotional transactions, the bottom line still matters price, timing, perpetration, outcome, negotiation. The agency's track record of helping hundreds of families and successfully marketing high-end properties reinforces that the team delivers.

Storytelling strength:

Results allow narratives to show resolution. Uncertainty becomes stability, chaos becomes direction, goals become reality.

Weak Attributes:

1. *Over-personalization*

Why it's problematic:

Because the brand is built so heavily on relationship-based service and emotional intelligence, some potential clients may worry the experience depends entirely on the personalities of the core team members. This could create a potential perception that the agency's value is not systemic, it's unscalable, and the quality may vary depending on who they interact with.

Storytelling challenge:

Narratives must show that empathy is not a "extra" offered by just one person on the team, but is a value the team is guided by, and guides the entire agency.

2. *Boutique limitations*

Why it's problematic:

A boutique, hyperlocal agency can be perceived as “small,” “limited,” or unable to compete with bigger national firms’ digital tools, ad budgets, or relocations pipelines. For out-of-state or luxury buyers this can mean doubt in reach or capability.

Storytelling challenge:

Stories need to shift perception: boutique means precision, mastery, and deep knowledge, not smallness. The stories must show how local expertise outperforms broad-scale approaches.

3. *Too emotional/not analytic enough*

Why it’s problematic:

Because the brand emphasizes story, life in the home, and emotional intelligence, some audiences (investors, data-driven buyers, time-sensitive sellers) may fear the agency will prioritize feeling good over performance.

Storytelling challenge:

Narratives must demonstrate results—that empathy and storytelling aren’t the opposite of performance, but the fuel that drives better outcomes.

Part 2: Storytelling Execution Portfolio

Value Story – *The Parkers*

Alex and Jamie Parker always knew they’d return to New Mexico someday. Alex grew up in Bernalillo, Jamie in Socorro—two small towns tied to dusty sunsets, family traditions, and a rhythm of life they never fully left behind. After high school, both left for Southern California, where they met, fell in love, built careers, and started a family.

As their kids, Emma and Lucas, grew, the question of where to settle became urgent. They explored big cities across the Southwest: Denver, Austin, Phoenix. They were chasing opportunity, good schools, and a lifestyle they could see themselves thriving in. But every option left them feeling lost and uncertain. None of the cities felt like home.

Then Santa Fe entered the picture. It had lingered in their memories from childhood visits, but now it needed to be tested against other urban possibilities. Their curiosity led them to the Tercero Agency online, through videos, neighborhood guides, and lifestyle breakdowns. What set the Tercero story apart was how vivid and human it felt. Brian and Benji didn’t just talk about homes—they shared life in the city: the culture, the schools, the rhythms of each neighborhood, and what it was like to raise a family there.

When they finally reached out, Brian called the next morning. The Parkers explained their uncertainty, their limited experience in Santa Fe, and the challenges of timing and school transitions. Brian listened, drawing on his own experience raising four kids in the city. He

offered insight that no generic listing could provide: which neighborhoods felt safest, which schools had the best programs, and what life there really looked like.

Within days, the Parkers received a tailored list of homes. One property immediately felt right—the size, the light, the neighborhood—all perfectly aligning with the family’s vision. When a pricing hurdle threatened to derail the purchase, Brian stepped in, negotiating terms that protected the Parkers’ budget while securing the home they loved.

By July, they moved in. A welcome bundle awaited on the fireplace: neighborhood guides, city maps, favorite local spots, treats for the kids, and a bottle of wine. It wasn’t just a move—it was a homecoming.

Weeks later, at the Tercero Agency’s client appreciation night at Sky Theater, Alex and Jamie watched their kids connect with other kids. With laughter filling the room, surrounded by community and warmth, they realized that they hadn’t just found a house—they had found where they truly belonged.

Purpose Story (Speech Draft) – Showing Up

When people ask me how the Tercero Agency started, I tell them the truth: it wasn’t planned. It almost happened by accident. I graduated with a business degree, but honestly? I was just a computer geek. Weekends in my 20’s were spent taking apart computers and Xboxes just to put them back together. I taught myself web design back when it was just raw HTML. I would spend hours in Photoshop trying to paint the clouds I saw in the Santa Fe skies exactly right. I loved building things—quietly, methodically, on my own terms.

When Elena and I started our family, I took a job in the basement of Prudential fixing computers. Steady work. Predictable. Then Prudential closed, Keller Williams Realty moved in, and suddenly... real estate was my world. I never imagined I’d do it. I’m an introvert. Talking to strangers? Small talk? I thought I’d never survive it. Too sensitive. Too cautious.

But life has a funny way of showing you purpose. You step in, you test the waters, and one day ten years later, you realize you’ve built something. Something bigger than yourself. Something that matters. Tony Stark is the man—not the tech, but the vision, the innovation, the leadership. I wanted to do that. But in a way that felt like home. That felt like Santa Fe. That felt like family.

And family—real, messy, loyal family—became the backbone of the agency. Benjamin, my brother. Camilia, my sister-in-law. Andres, my cousin. Johnathan, my brother behind the camera making us look good. Alison... well, we joke she’s adopted. This isn’t just a team. This is a family showing up for other families.

I grew up in Agua Fría. Community isn’t a concept there. It’s responsibility. My grandfather ran the neighborhood grocery and gas station. Everyone knew him. If someone needed help, you

showed up. When my dad has a project—even ridiculous ones—we show up. That’s how I was raised. That’s how I lead. Showing up. Always.

Over the years, I’ve realized what I bring isn’t transactions. It’s guidance. Clarity. Trust. Showing up when it matters most. My philosophy is simple: work is work. You don’t have to love it. You get really, ridiculously good at it, because life demands it. Because the people who rely on you deserve it. Because that’s how you build something that lasts.

The Tercero Agency exists because purpose finds you when you commit. When you show up. When you care enough to fight for people. That’s our north star. That’s what keeps me going. That’s what this family shows up for, every single day.

Founder Story (Adaptation) – *It's not about the house...*

For the Tercero family, Santa Fe has always been home. Brian grew up in the historic Village of Agua Fría on land passed down through generations—a place where family gatherings, laughter, and everyday life shaped not just his childhood, but his understanding of what a home truly means. From an early age, he learned that a house is more than bricks and mortar; it’s the foundation for life, community, and memories. That deep connection to home and heritage has guided every decision we make at the Tercero Agency.

Brian began his real estate career in 2010, bringing with him more than knowledge of the market—he brought a belief that every client deserves to be heard, understood, and guided with care. Buying or selling a home is one of life’s biggest milestones. It’s exciting, emotional, and often overwhelming. We understand that. That’s why empathy is at the heart of everything we do. We take the time to listen, to anticipate concerns, and to walk alongside our clients through every step of the journey.

At the same time, we pride ourselves on mastery. Over more than a decade, Brian has honed his expertise in market analysis, marketing, negotiation, and technology. As a founding member of Keller Williams’ expansion into Santa Fe, he combined this expertise with an innovative approach that consistently delivers results. Together with our team, we have helped over 450 families buy or sell homes, including some of the city’s most prestigious properties. But our true measure of success isn’t the number of homes sold—it’s the confidence, clarity, and joy our clients feel when they step into their new chapter.

For us, real estate isn’t a transaction. It’s a partnership. It’s about understanding your story, respecting your goals, and guiding you to the outcome that’s right for you. Every home we sell, every family we serve, reinforces our mission: to provide an unmatched real estate experience rooted in mastery, results, and empathy. Because at the Tercero Agency, it’s never about the house—it’s about the life you live in it.

Customer Stories (x5)

Customer Story 1

“I discovered Brian and Benjamin's YouTube videos long before I got the wheels turning on my move. I watched many, if not all, of them over several years. By the time I was ready to make the move to NM, I felt like I knew them.

Of course, I knew that was as silly as feeling like you know the newscasters you watch every night...but when I finally met them in person, they were the same as they were in their videos! So really, I did know them! And that made it easy to start working with them to find a place to call our own in our new home of Santa Fe!

From beginning to end, they made us feel valued and cared for and helped us with every step.

Andres was always warm, friendly, pleasant, and helpful (besides being unfailingly punctual) in showing us properties, and the rest of the team supported the whole process. Benjamin was great in guiding us through the wrinkles in situations involving offers and negotiations and offered advice when needed. He also recommended contractors to help us address issues, which was very appreciated because we were new to the area.

Since our purchase, we have been surprised and impressed by the way they maintain relationships with their clients by hosting generous customer appreciation events, which have the unexpected benefit of building community. We now talk to some of the same people at these events, making them more enjoyable.

All to say...the Tercero Agency is interested in more than just your real estate transaction; they care about you and want you to be glad you chose to move to Santa Fe.

When Brian says, ‘We're here to serve you,’ and ‘Let us be your guide,’ he means it, and that's exactly what they will do.”

– Martin (Google Review)

Discussion

Core Outcome:

The review demonstrates that working with the Tercero Agency leads to a smooth, personalized, and trustworthy real estate experience, even for someone new to Santa Fe. The client feels supported through every step, beyond the transaction, including guidance on offers, negotiations, and local resources. The lesson is that the Tercero Agency prioritizes the client’s entire experience, not just the sale, creating lasting value and connection.

Attributes Demonstrated:

Empathy – Team understands client needs, anticipates challenges, and provides support, making client feel cared for and understood.

Mastery – Knowledge of real estate transactions, negotiations, and local resources shows professional competence and expertise.

Results – Help clients successfully navigate market, close on a home, and solve unexpected challenges, delivering a successful outcome.

Core Emotion(s):

Trust, comfort, belonging, connection, relief, satisfaction

Customer Story 2

“I was more than impressed with the personal, yet professionalism Brian offered as my realtor. My house needed to be sold in a very short period of time. After meeting with Brian, we created a plan that would work perfectly for what I needed to do. I followed all his recommendations and completed all the work he suggested to make my home market-ready and presentable. When we listed the house, he implemented a perfect showing plan, and we received multiple offers on the first day it was listed. We accepted an offer over the asking price, and we moved forward to a smooth closing, closing at the exact time I needed to. I appreciated that Brian made the process painless and enjoyable. He took care of absolutely all the details, and I didn't have to worry about anything but getting my belongings packed and the house presentable. I appreciated this because selling your house is a complicated and intricate process. I completely trust Brian. He has incredible knowledge about the business and cares wholeheartedly about his clients and the work that he does. Thank you, Brian, for being a SUPERB realtor and selling my house in a day—breaking records in the process. You're awesome at what you do! Keep up the excellent service and work ethic!”

– D. Ruiz (Zillow)

Discussion

Core Outcome:

The review shows that working with Brian leads to fast, smooth, and successful home sales, even under time-sensitive or challenging circumstances. Brian’s strategic approach and comprehensive support make complex real estate transactions manageable and rewarding for the client.

Attributes:

Mastery – Demonstrates deep knowledge of market, staging, marketing, and negotiation leading to multiple offers and record-breaking results.

Results – Client sold their home quickly, received multiple offers first day and closed on time at a price over asking.

Empathy – Brian takes care of all the details and guides the client through the process, reducing stress and making the experience enjoyable.

Core Emotion:

Confidence, reassurance, relief, gratitude, and satisfaction

Customer Story 3

“Ben was a Godsend to my family. He knows how to treat his customers like they actually mean something. We called Ben day and night with questions and he was always there. Always willing to roll up his sleeves and dive into the legwork that it takes to get our home sold. I truly appreciate his hard work and diligence. He made the nightmare we were going through into a true dream come true. Thank you all from Tercero Realty.”

– Kevin Silva (Zillow)

Discussion

Core Outcome:

Demonstrates that working with Ben (Tercero Agency) transforms a stressful, challenging home selling situation into a smooth and positive experience. The agency’s hands-on, responsive approach turns what could be a “nightmare” into success.

Attributes:

Empathy – Ben treats clients with genuine care, responding to questions day or night and valuing their experience.

Mastery – Ben knows the process inside and out and is willing to dive into the legwork required to get the home sold efficiently.

Results – Ben’s diligence and hard work lead to a successful sale of the client’s home, turning a difficult situation into a positive one.

Core Emotion:

Relief, trust, reassurance, gratitude, joy

Customer Story 4 –

“Benjamin helped my husband and I buy our investment property in Santa Fe. He found the property, a vacation home located by Bishop's Lodge. He went to send us walk-through videos. This house is exactly what we were looking for, and thanks to Benjamin we went into contract the very first day the house was on the market. He also negotiated getting us the furniture already in the house. I should probably mention that we did not see the house before we bought it. Covid made trips to Santa Fe impossible. It is not entirely easy to work with out-of-state buyers, but Benjamin is very responsive and everything went smoothly.

We were overjoyed when we first visited the property, it was even better than expected, beautiful in a beautiful location.”

– Linda J. (Yelp)

Discussion

Core Outcome:

The review shows that working with Benjamin allows clients, even out-of-state buyers during challenging circumstances like COVID, to successfully purchase their ideal property. Ben’s expertise, responsiveness, and proactive guidance ensure smooth transactions when clients cannot be physically present.

Attributes:

Mastery – Ben demonstrates knowledge of market and negotiation skills, securing both property and additional benefits for the client.

Results – Clients went into contract the first day the property was on the market, achieving their goal quickly and efficiently.

Empathy – He accommodates out-of-state buyer’s challenges, provides solutions and maintains constant communication, showing understanding of clients needs.

Core Emotion:

Confidence, reassurance, joy, excitement, relief

Customer Story 5 –

“Brian Tercero is hands down the best realtor I have ever done business with. He will listen to you, assess your property fairly and market it with the best tools known to the industry. His photographer is truly excellent at his craft, and your house photos and videos will invite the viewer in to take a more serious look. In my life, I have been involved either directly with the sale of four houses of my own or several others with close family, totaling seven in all. He is an excellent negotiator, and I felt we were well respected every step of the way. He isn't a lazy door unlocker who just fills out the forms and waits to collect the fees. He works hard, all day every day! He isn't a “bulldog” or a “shark,” he is a truly nice guy who is good at what he does. He man has character.”

– Kay

Discussion

Core Outcome:

Shows that working with Brian results in a professional, high-quality, and well-managed home sale. Clients experience a thorough, personalized approach that combines effective marketing, skilled negotiation, and attention to every detail. Brian's commitment and expertise lead to a respectful, efficient, and successful transaction.

Attributes:

Mastery- Demonstrates deep knowledge of real estate marketing, photography, negotiation, and transaction management.

Results – Client's property was effectively marketed and negotiated, ensuring a smooth and successful process.

Empathy – He listens carefully, respects client throughout, and treats people with character and integrity rather than being aggressive or impersonal.

Core Emotion:

Trust, reassurance, respect, comfort