



The Cloud Broker

8 Problems to Fix Today at Your Brokerage

A No-BS Guide with Exact Steps to Follow

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Introduction

This playbook is built to be **crisp, practical, and easy to follow**, so you can move from "we should fix this" to "it's working" in hours, not weeks and months. We've trimmed the fluff, added relevant assets, and organized everything into 10-15 minute blocks.

Still, if you get stuck at any point, **we're here to help**. Just reach out (details at the end) and we'll get you unblocked. The goal of this playbook is to make execution inevitable. Godspeed!

- **Who this is for**

Owners, ops leads, and team leaders who want fewer stale leads, faster showings, cleaner ops, and measurable ROI - without adding another "project."

- **What you'll achieve**

- Contact 80% of new leads in <2 minutes
- >35% contacts → appointments, >20% appts → signed clients
- Showings confirmed in <15 minutes with usable seller feedback
- Zero missing-doc closings and ACH payouts <24 hours
- Consistent past-client engagement and review/referral growth
- A single ROI view across sources, campaigns, agents, and price bands

- **How to use this playbook**

- **Pick one section per day** (10-15 minutes each).
- **Follow the scripts and rules** as written; customize as needed.
- **Run the smoke tests** after each step to verify wiring.
- **Coach to the numbers** (Contact%, Appt%, Signed%, \$/Signed) weekly.

Problems you'll solve

- "High lead expense, low conversion"
- "Hot leads go stale"
- "Constant scheduling issues"
- "No new business from ex-clients"
- "Paperwork drowning top producers"
- "Amateur listings, slow launch"
- "No/low visibility of tools and spends"
- "Agents flocking to eXp/REAL"

1.

High lead expense, low conversion

"We're paying \$8,000/month for leads that agents complain are worthless - then, they blame us when they can't close deals"

"We're losing hot leads because nobody's calling when leads drop, especially evenings, weekends, holidays."

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Both are basically the same problems. Leads go stale fast and need quick action as well as adequate nurturing. After arriving, they are left sitting for days and weeks before first contact is made.

• Why this matters

Responding within minutes drastically lifts qualification odds. A Harvard Business Review analysis found dramatic decay in conversion odds as minutes tick by; the average response among companies that did respond was 42 hours; far too slow. Your competitive edge is minutes, not scripts.

• Owner's outcome

→ Contact at least **80%** of new leads in **<2 minutes**

→ Convert **>35%** of contacts to appointments

→ Convert **>20%** of appointments to signed clients

What you need (10-minute checklist)

CRM	Your CRM (In this guide Follow Up Boss (FUB) is used as reference) with owner/admin access
Lead sources	Zillow Tech Connect / Real Geeks / Ylopo (or equivalents)
Phones & texting	CRM-based phone numbers provisioned for each agent (or a team line)
Optional 24/7 backup	An AI/ISA* caller (e.g., Retell, Vapi, or ElevenLabs) to place the first call immediately when no human is available (see footer for legal notes).

Footer:

AI/ISA: automated voice agent or inside sales assistant. Under the TCPA, AI/prerecorded voice calls require prior express consent; the FCC clarified in Feb 2024 that AI-generated voices fall under the "artificial/prerecorded" rules. Use responsibly and prefer human-placed calls + 1-to-1 texts for new leads unless you have documented consent.

Step 1:

Configure your CRM so leads can't fall through cracks

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Build a simple, universal pipeline

Where: CRM (example: FUB → Deals → Settings → Stages)

Stages (exact names):

- New → Attempted → Engaged → Appt Set → Signed → Under Contract → Closed → Lost
- Add a required note on each stage change (what happened + next step).
- Keep Buyer and Seller pipelines separate if you prefer cleaner reporting.

FUB is designed around "work the next best thing" with saved lists and automations. Smart Lists act like living to-do boards so agents don't hunt in 20 places. Look for similar features if you use a different CRM.

B

Create Smart Lists

Where: CRM (example: FUB → People → Manage → + New List)

Make these four (share with "Team"):

- **New (24h):** filter by "Created < 1 day" and "Stage = New."
- **Appt Set >3d, Not Signed:** filters "Stage = Appt Set" + "Days in Stage > 3."
- **Stalled >30d:** filters "Last communication > 30 days," Stage in Attempted/Engaged."
- **Past Clients:** filter "Tag contains 'Past Client'."

Why: Agents open CRM and click one list. Hence, no guesswork. Smart Lists highlight contacts by stage, recent website activity, or last contact so "today's priorities" are obvious.

C

Turn on First-to-Claim + off-hours coverage

Where: CRM (example: FUB → Admin → Lead Flow → First to Claim)

- Create a **First-to-Claim group** for daytime agents.
- Create an **On-Duty** group for **weeknights 5–9pm** and **weekends 10–6**.
- Set notifications → **push** and **SMS** so whoever's free grabs new leads instantly.

Why: All members get a push alert when a lead arrives; the first person who taps "Claim" is assigned; no bottleneck.

D

Enable "Initial Text" on new leads

Where: CRM (example: FUB → Lead Flow → Initial Text)

- Toggle ON and paste your message (below).
- Choose the **company number** or agent number for the send.

Copy-paste initial text (keeps it human, TCPA-sane):

"Hi {{first_name}}, it's {{agent}} with {{brokerage}}. I saw your request about {{address/area}}. I can hold a 20-min window today 5-7 or tomorrow 10-12. Which works?"

Why: If the agent can't call within seconds, the lead still gets a relevant, human-sounding touch right away. (FUB supports initial text per Lead Flow source.)

E

Turn on call recording & summaries

Where: CRM (example: FUB → Power-Ups / Phone → Call Recording)

- Enable per number, and turn on **transcripts/summaries** if available
- Add a short disclosure line to your standard intro in **all-party** consent states (see "Compliance" at the end).

Recordings + transcripts save coaching time and put "what was promised" on the contact timeline.

F

Add basic Automations

Where: CRM (example: FUB → Automations)

Start with 4 rules:

- **Trigger:** Person Stage = **New** → **Action:** Create Task "Call now," due **now**.
- **Trigger:** Stage = **Attempted** & no contact 2 min → **Action:** Create Task "Retry now."
- **Trigger:** Stage changes to **Engaged** → **Action:** Add Note "Offer two times today."
- **Trigger:** Deal Stage changes to **Under Contract** → **Action:** Create Task "Create Brokermint file."

Automations fire checklists and reminders without relying on memory.

Step 2:

Wire every lead source into your CRM

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A

Ylopo → CRM (behavior-rich lead data)

Why it matters: Ylopo passes real-time leads plus behavior (saved homes, search history). That lets you trigger "hand-raise" texts when someone's hot.

How: Follow the Ylopo integration guide and test with a dummy lead; verify the behavior events appear on the CRM timeline.

B

Real Geeks → CRM (site activity + valuations)

What syncs: name, phone, property viewed/saved, searches, home-valuation inquiries (varies by setup).

How: Use Real Geeks 2-way assignment; send a test; confirm fields populate in the CRM.

C

Zillow Tech Connect → CRM

How: Enable Tech Connect in Zillow, add your CRM routing email/connection, and send a test inquiry. Confirm the contact appears with Source: Zillow and that your Initial Text fired. (Zillow docs vary by market)

5-minute smoke test: Submit one dummy lead from each source → verify the contact appears in FUB with the right Source, Stage = New, and the Initial Text logged in the timeline. If any fail, fix before go-live.

Step 3:

Build your "speed stack"

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Optional AI/ISA first-touch

If you truly can't cover evenings/weekends, add an **AI voice agent or ISA** that:

- Calls immediately when a lead hits your CRM (via webhook or email parser),
- Confirms intent and collects basics (budget, timeline, financing, area),
- Gather additional information if needed,
- Proposes two time options, and
- Drops a structured summary back into the CRM timeline.

Under the FCC's TCPA rulings, AI-generated voice calls are treated as artificial/prerecorded and require prior express consent; do not use an AI voice to robocall cell numbers without proper consent. Prefer human-placed calls plus the FUB Initial Text for compliance-safe first touch.

Step 4:

Train agents on a 3-minute, repeatable flow

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Optional AI/ISA first-touch

- Open **"New (24h)" Smart List** and work top-to-bottom.
- **Call immediately.** If no answer, send the **two-times text** (above).
- **Retry at +2 min, +30 min, +24h;** then daily touches (mix of text/email/call) for **14 days.**
- **When they reply:** move Stage to **Engaged;** offer two appointment windows and set a **20-minute hold** on the calendar.
- **If they waffle ("just looking"):** "Totally fine. Most people are. I can hold a short **20-minute** slot **today 5-7** or **tomorrow 10-12** so you're oriented before the weekend rush. Which works for you better?"
- **Always log a one-line note** when you change stages ("No answer; retry +2m," etc.).

Why "two options"? It reduces indecision: people pick between A or B instead of inventing "later." No tool needed - just consistent phrasing.

Step 5:

14-Day Warm-Up Action Plan (paste into FUB)

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Day 0:	• Immediate call + Initial Text (auto). • If missed call: leave an 8-10 sec voicemail ("two time options") and log it.
Day 1 (AM, text):	• "Saw a few homes under \${{budget_high}} in {{area}}. We can narrow on a 15-min zoom if you're available."
Day 2 (VM or text):	• "I can hold a {{address_or_area}} slot before the weekend; 20 minutes so you're not rushed. Works?"
Day 3 (email):	• Send a 3-property micro-CMA (1 page: low/likely/stretch price). Offer two time windows.
Day 4 (behavior trigger, auto-text):	• If lead saves 2+ homes or visits 3× in 7 days (Ylopo/Real Geeks events into FUB): "{{area}} is booking fast. Want me to unlock a 20-min slot before it books up?"
Day 5 (video text, 30-45 sec):	• "What happens at your first tour + how we speed up offers."
Day 7 (email):	• If "Needs lender" → warm intro to preferred lenders.
Day 10 (text):	• "Most buyers widen by 3-5%. Some options in the {{price_band}} are quite value for money. Do let me know if interested."
Day 14 (call):	• "Last call for now - happy to hold a window next week. Want Tue 5:20 or Wed 10:40?"

5-minute weekly QA

Are there any "New" leads older than 30 minutes? If yes, On-Duty fix now.

1.

Do Initial Texts appear in the timeline for every source? If not, fix Lead Flow mapping.

2.

Randomly check 3 call recordings for disclosure + offer of two time slots. (Turn on call recording/power-ups if you haven't.)

3.

Pull a quick funnel report: Contact%, Appt%, Signed%. Coach where it breaks.

4.

Compliance & "safe use" notes

- **TCPA / AI voice:** The FCC confirmed that **AI-generated voices count as "artificial/prerecorded" calls**. You need **prior express consent** to use them in robocalls; don't auto-dial cell phones with AI voices without consent. Stick to **human-placed calls** and **1-to-1 texts** for first contact unless you have documented consent.
- **Texts:** The FCC consumer guide reiterates that auto-dialed/prerecorded/AI texts also require consent; always honor "STOP."
- **Call recording:** U.S. **federal** law is one-party consent, but several states require **all-party** consent. The safest practice is to **announce at the start**: "Quick heads-up, this call may be recorded for accuracy. Is that okay?" Then proceed only if they agree. (State laws vary; the majority are one-party, but check your state.)

Owner's smoke test (15 minutes, do this once)

- Submit a **test lead** from **each** source (Zillow / Real Geeks / Ylopo).
- Confirm in FUB: appears under **New**, correct **Source**, **Initial Text** logged.
- Claim via **First-to-Claim**; verify push alerts on the phones.
- Change Stage to **Engaged**; check the **automation** added the "Offer two times today" note.
- Make one test call and check the **recording/transcript** appears on the timeline (if enabled).

Copy-paste scripts (drop-in ready)

Initial text (auto on new lead):

"Hi {{first_name}}, it's {{agent}} with {{brokerage}}. I saw your request about {{address/area}}. I can hold a 20-min window **today 5-7** or **tomorrow 10-12**. Which works?"

No-answer voicemail (8-10 sec):

"{{first_name}}, {{agent}} here. Two quick options: **today 5-7** or **tomorrow 10-12**. I'll also drop a text."

Behavior trigger text (saved 2+ homes / 3+ visits in 7 days):

"Want me to unlock a **20-min slot** at {{area}} before weekend slots fill?"

Appointment close (live or text):

"I can do **today at 5:40** or **tomorrow at 10:20**. Which should I hold for you?"

2.

Hot leads go stale

"Buyers complain it takes days to schedule a showing, sellers complain no one gives them feedback, and agents waste hours coordinating by text."

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Delays kill momentum; missing feedback causes mis-pricing and churn.

- **Owner's outcome**

- >80% of showing requests **confirmed in <15 minutes**
- >50% of showings return **usable seller feedback**
- Agents stop juggling texts; sellers see a clean weekly report and feel informed

- **Why this matters**

Momentum wins. If buyers wait, they cool off.

Sellers who don't see prompt, concrete feedback lose trust and push for premature price cuts.

The fix is a single pipeline: **ShowingTime** → **smart lockbox** → **automated feedback** → **weekly seller report**, with light CRM sync so activity lives on the contact's timeline. (ShowingTime supports **auto-confirm** settings; it can **auto-send and compile feedback** into seller-ready reports.)

What you need (10-minute checklist)

Showing scheduler	ShowingTime (or ShowingTime+) account with your MLS/office settings
Smart lockbox	Supra eKEY or SentriLock (SentriKey) on every listing (phone-based access with access logs)
Calendar	Agent Google/Outlook calendars + (optional) ShowingTime calendar sync link
CRM	Your CRM (examples reference Follow Up Boss) for timeline notes and tasks; optional appointment sync nuances noted below.

Step 1:

Standardize how showings are requested

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Goal: All showing requests go through **one door** (ShowingTime), so nothing hides in text threads.

A

Make ShowingTime the default on every listing

- In ShowingTime **Listing Setup** → **Appointment Settings**, set **Appointment Type** based on occupancy:
- **Go & Show / Auto Confirm** for vacant or easy listings (no human confirmation needed).
- **Courtesy Call - Auto Confirm** if you want occupants notified but not blocking the showing.
- Require explicit approval only where necessary (tenants, pets, alarms).
- Add the same instruction in MLS **Agent Remarks**: "Please **request via ShowingTime** (no texts)."

Notify the right people

- In **Listing Setup**, add seller/occupant contacts (if appropriate) to receive **confirm/cancel** notices. This keeps owners looped in and reduces "Did anyone confirm?" texts.

Turn on the Monday morning seller report

- Enable the **Listing Activity/Feedback report** to compile automatically and send (or be ready to send) each Monday at 9am.

Pro tip (Owner note)

Only use "approval required" when you must.
Every manual hop delays confirmation and risks buyer drop-off. Auto-confirm where you safely can.



Step 2:

Put a smart lockbox on every door

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Goal: No key hunts, no porch wait-times, **full access logs** for accountability/safety.

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Install and assign the lockbox

- **Supra eKEY** or **SentriKey app** → assign lockbox to the listing; set showing hours, notes, and permissions. Both apps maintain **access logs** (who, when).

Share instructions inside ShowingTime

- In Listing Setup, add "Access via Supra/SentriLock - see showing instructions.

Safety & privacy

- Never place alarm codes or camera passwords in public remarks. Rotate any temporary codes post-closing.

Pro tip

Both platforms support **one-day codes** and Bluetooth unlocks. Use them to accommodate app-less cooperating agents without compromising audit trails.



Step 3:

Automate feedback so sellers see it

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Goal: A **50%+ feedback** rate without your listing agents emailing all day

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Turn on Enhanced/Automatic Feedback

- Configure ShowingTime to **auto-send feedback forms** after each showing with **1-2 reminders at 24-48 hours**. Use the built-in templates (keep it short: price perception, condition, fit, likelihood of offer).

Auto-publish or approve first?

- Choose **auto-publish to seller** for speed or **agent-review first** for sensitive price feedback. (Both options are supported.)

Weekly seller-ready report

- Use the built-in **Listing Activity/Feedback** report (charts + comments). Send Monday a.m. consistently.

Script (Agent → seller, same day as first showings)

"We'll send you a weekly summary every Monday. You'll also see comments come in automatically. If anything urgent pops up (e.g., consistent odor/price note), I'll flag it same-day."

Step 4:

Light CRM + calendar wiring

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Goal: Appointments/feedback live in your working systems; agents see their day at a glance.

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Calendar sync

- In ShowingTime: **Profile** → **Calendar Sync** → **Sync Now** to generate your iCal and subscribe it in Google/Outlook. (This keeps agent calendars current even if a showing was booked outside the CRM.)

CRM timeline notes and what actually syncs

- ShowingTime appointment syncing currently works for **Zillow-requested tours** or when you create the ShowingTime appointment via your CRM's "**Manage in ShowingTime**"

**If you create the appointment directly in your
MLS/ShowingTime, it won't auto-sync.**

(Fallback: forward the confirmation email to the contact to keep the timeline tidy.)

Pro tip (Ops)

Add an **automation** in your CRM: "After ShowingTime confirmation email is received → create a same-day task 'Send feedback chase if none by 6pm'."



Step 5:

Agent-facing SOP (what to click, what to say)

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When a buyer asks for a time

- Offer **two concrete windows**:

"I can do **today 5:40-6:00** or **tomorrow 10:20-10:40**. Which one do you prefer?"

- Immediately **send the ShowingTime request** (not a text to the listing agent).

- When confirmed, text your client:

"Booked for **10:20-10:40**. You'll get a calendar hold. Please arrive 5 minutes early."

After the showing

- Log 1 line in the CRM: "Viewed 123 Main; liked yard, concerned about road noise."

- If you're the **listing agent** and no feedback arrives by **EOD**, send the same-day nudge to the showing agent:

"Quick favor. **One line** I can bring to the seller? (price / condition / location)"

Weekly seller call (10 minutes)

- Use the Monday report: "We had **X** showings, **Y%** said price felt [high/ok], top three comments were **A/B/C**. If we see this again by Thursday, I recommend [**staging tweak/price band**]."

10-minute weekly QA

1. Randomly pick 3 active listings

Are they set to **Auto Confirm** where appropriate?

Does the **lockbox** show recent **access logs**? (If not, confirm assignment and hours.)

2. Feedback audit

Open feedback dashboard: Is the **response rate** $\geq 50\%$? Add the same-day agent nudge if not.

3. Seller report check

Did the **Monday report** go out? Spot-read for repeating price/condition themes to coach listing strategy

4. CRM timeline sanity

For tours booked via CRM (like FUB's "Manage in ShowingTime"), do they **appear on the CRM calendar**? If not, retrain agents to originate tours from CRM where possible.

Compliance & safety

- **Property access & privacy:** Do not share alarm/camera credentials in public remarks; rotate any temporary codes post-closing.
- **Fair housing:** Keep feedback questions and seller summaries focused on **property attributes** (price, condition, location) rather than buyer demographics/preferences.
- **Lockbox audit trail:** Use **Supra/SentriLock access logs** to resolve disputes and for incident review if needed.

Copy-paste assets

Buyer scheduling text (agent → client)

"Good news. I can hold **today 5:40-6:00** or **tomorrow 10:20-10:40**. Which should I lock in?"

Showing request note (agent → listing via ShowingTime notes)

"Buyer is pre-approved, 20-min window ok, we'll be on time and leave lights as found. Thanks!"

Feedback chase (listing agent → showing agent, same day)

"Quick favor. **One line** I can bring to the seller? (price / condition / location)"

Seller update (listing agent → seller, Monday)

"Last week: **4 showings**. Themes: price felt a touch high vs. comps; hallway paint scuffs; great yard. Plan: touch-up paint Wed; reassess price band Thursday based on new comp at 456 Oak."

3.

**"Our clients say they'll do business with us,
yet only a few show up later."**

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- **Owner's outcome**

- **>30%** monthly engagement from homeowners on your list
- **Referrals + repeats = >25% of GCI** within 2 quarters
- Consistent **Google review growth** and booked valuation consults from activity spikes

- **Why this matters (proof points)**

88% say they'd use their agent again; only 28% do. That's referral/repeat money gone.

Solutions like Homebot have an open rate of 70-80% and help you send branded communications as if they were coming from you. Likewise, Client Giant helps you send thoughtful gifts to your clients during critical milestones (e.g. during a transaction, every quarter, etc.)

What you need (10-minute checklist)

Homeowner engagement	Homebot (or equivalent) connected to your MLS/AVM + your logo/brand.
CMA tool	Cloud CMA (or similar) for fast, branded 1-page "price band" snapshots.
Gifting (optional)	Client Giant (or your in-house kit) to automate tasteful touches - not contingent on referrals (RESPA-safe; see compliance).
CRM	FUB (as reference) for tags, Action Plans, automations.

Step 1:

Load & tag every homeowner

Clean CSV: name, email, mobile, property address, close date, agent of record.

Import to Homebot and **brand** the digest (logo, colors). Verify your sender identity so mail lands in Primary/Focused, not Promotions. (Homebot shows per-contact opens/clicks.)

In your CRM, bulk-apply tags: **Past-Client, Homebot**. Create saved views by agent so each producer sees their book.

Side note

Reality check: Treat Homebot's open-rate claims as directional, then watch your real opens/clicks in the dashboard. Vendor case studies cite 70-80%; your list quality and subject lines drive the real number.



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Step 2:

Install a Quarterly Touch Action Plan (set once, runs forever)

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Cadence (per contact, repeats every 90 days):

Month 1 (Text):

- Equity check-in
"Quick equity check-in for {{street}} - want a 3-page price band and sale-prep tips? Takes me 10 minutes."

**Month 2
(Gift or "delight" touch):**

- Optional
Use Client Giant or your kit; choose fixed tiers by lifecycle (e.g., closed <12m: card; 12-36m: small seasonal). Do not tie to referrals (RESPA).

Month 3 (Email):

- Mini CMA + review/referral ask
Subject: "Your {{street}} equity snapshot (updated)"
Body: attach a 1-page Cloud CMA with Low / Likely / Stretch band + CTA: "Want a 15-minute valuation consult? Tue 12:20 or Thu 5:10?"

Every close (automation):

- enroll in Homebot + schedule 90-day Action Plan.

How to set it up (FUB example):

People → Action Plans → **New Plan** ("Quarterly Touch - Homeowners") → add steps above with **relative dates** (Day 0, +30, +60) → set recurrence = every 90 days → apply to all **Past-Client + Homebot** contacts.

Why Cloud CMA: It's built to produce branded, MLS-fed CMAs fast; perfect for 1-pagers you'll actually send.

Step 3:

Turn behavior spikes into booked appointments

Trigger logic (configure in Homebot + CRM):

If a homeowner **opens/clicks** their digest **2+ times in 7 days** or requests a "sell now / value update":

→ CRM auto-task: "Create 1-page CMA + call in 24h."

→ Send the "two choices" slot text:

"I saw a few changes in your equity trend. Want a 15-min valuation? Today 5:40 or tomorrow 10:20?"

Where this comes from: Homebot exposes engagement signals; use them to prioritize.

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Step 4:

Ask for reviews and referrals the right way (RESPA-safe)

Reviews (always): after closing and in Month 3 of each quarter:

If I've been helpful, a **quick Google review** helps neighbors find us. Here's the link: {{short_review_link}} - thank you!"

Referrals (never contingent):

"Know a friend or neighbor who needs advice? I'm happy to be a resource - no pressure."

Compliance basics you should know

RESPA Section 8 allows gifts/discounts to consumers for doing business with you, but prohibits giving anything of value in exchange for a referral of settlement services. There's no de minimis exception; patterns of conduct count. Keep gifts modest and not conditioned on referrals.

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Step 5:

Agent SOP

- Each Monday, open your "**Past-Client + Homebot**" Smart List.
- Send the Week's step (Text / Gift / Email) from the Action Plan; don't improvise.
- If Homebot shows **spike activity**, call the same day and offer **two times**.
- Log one-liners in CRM ("Opened digest 3x; booked Thu 5:10 valuation.")

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10-minute monthly QA

1. Scoreboard pull

Appointments from spikes, number of 1-page CMAs sent, reviews added, referrals logged.

2. Spot check 5 contacts

Action Plan steps firing on time? Any "Month 2 gift" tied to a referral? (If yes, remove as it's in violation with RESPA.)

3. Budget move

If referrals trending up and paid leads lagging on \$/Signed, reallocate 10-20% of spend toward sphere programming (events, content).

Copy-paste assets (drop these into your tools)

Month-1 Text

"Quick equity check-in for **{{street}}**. Want a **3-page price band** and a 10-min call?"

Month-3 Email body (with Cloud CMA 1-pager)

"Attached is a simple **price band** (Low / Likely / Stretch) for **{{street}}** using recent comps. If helpful, I can walk you through it: **Tue 12:20** or **Thu 5:10**?"

Spike Text (opened 2+ times this week)

"Noticed activity on your equity update: want a **15-min valuation**? **Today 5:40** or **tomorrow 10:20**?"

Google Review Ask

"If I've been helpful, a quick **Google review** really helps neighbors find us: **{{short_review_link}}**. Thank you!"

Delight (card copy to include with gift)

"Appreciate you trusting us with **{{street}}**. We're here for questions any time, no pressure, ever."

4.

"My top producers spend 60% of their time on paperwork."

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- **Owner's outcome**

- **Zero "missing-doc" closings**
- **Payouts < 24 hours** from funding (ACH-ready)
- Agents spending **<20%** of time on admin

- **Why this matters**

When producers chase signatures, you pay an opportunity cost

The fix is simple plumbing: **DocuSign templates** → **Transaction Management Software** → **CRM trigger auto-creates the file** → **daily red-flag digest** → **automated commissions & deductions** → **ACH payout**.

DocuSign templates let you pre-place roles/fields once; Brokermint handles checklists, compliance, commissions, agent billing, QuickBooks sync, and a native integration path from **Follow Up Boss** → **Brokermint** so the transaction file appears at "Under Contract."

Ensure to have a written buyer agreement before touring in your buyer packets and your "tour" gate.

What you need (10-minute checklist)

eSign Platform	(we use DocuSign as reference): DocuSign (admin access) to create templates with roles & tabs (Listing Pack, Buyer Offer Pack).
TMS	(we use Brokermint checklists as reference): Brokermint (admin access) for checklists, compliance, commissions, agent billing, QBO sync .
CRM trigger	(we reference Follow Up Boss) to auto-create Brokermint transactions at stage change

Step 1:

Build two DocuSign templates (do this once)

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- **Templates**

- **Listing Pack** (Exclusive Listing Agreement, Seller Disclosures, Wire/Fraud Notice)
- **Buyer Offer Pack** (Buyer Rep & Compensation Agreement, Offer, Agency disclosures, Wire/Fraud Notice)

- **How (DocuSign)**

DocuSign → Templates → New → upload your standard forms → add Recipient Roles (Seller 1, Seller 2, Buyer 1, Buyer 2, Agent, TC) → place fields (sign/date/initials), set Routing Order (e.g., Buyer → Agent → TC). Save.

- **Make it fool-proof**

- Use **Required** fields (no "Next" until signed spots are hit).
- Pre-fill brokerage license and office address.
- Add a **conditional text** field for dual-agency states.
- Add **template messages** ("This call may be recorded..." if your team uses phone disclosures).

Quality bar: one clean send = 10 emails avoided. Take 45 minutes now; save dozens later.

Step 2:

Create TMS checklist templates (Listing / Buyer / Referral)

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TMS (BrokerMint) → **Transaction Management** → **Checklists** → **Templates**. Build three templates with **required docs + due dates** tied to status (e.g., "Inspection response due 3 business days after acceptance"). Include:

Buyer checklist:

Buyer Rep/Comp Agreement (tour gate), Agency, Earnest Money receipt, Lender pre-approval, Inspection docs, Appraisal, CD/ALTA, Final walkthrough.

Listing checklist:

Listing Agreement, Lead-based paint (if applicable), SPDS/Property Disclosures, HOA docs, Photos/Media rights, Offers, Counter(s), CD/ALTA.

Referral checklist:

Referral agreement, W-9s, CD/ALTA.

Set reminders (1-day before due; day-of) and assignees (Agent vs. TC).

Add a Compliance Notes custom field ("Doc absent because ...") so your broker can waive with written rationale (audit trail).

Step 3:

Wire CRM to TMS so files auto-appear at "Under Contract"

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CRM → TMS

→ In FUB: **Admin → API → Create API key.**

→ In Brokermint: **User → Add-ons → Follow Up Boss → Connect**, paste API key, toggle syncing. Now when a FUB **deal is created / stage changes**, Brokermint can create the incoming transaction with mapped people & property

Your rule of thumb

Trigger	FUB Deal Stage changes to Under Contract
Action	Create Brokermint file (mapped: Buyer/Seller, Addresses, Price, Close date, Assigned Agent/TC).
Next	Brokermint automatically applies the right checklist template by deal type.

If you don't use FUB, replicate via Zapier: CRM Stage → Brokermint "Create Transaction."

Step 4:

Daily "red-flag" digest so nothing slips

In your TMS, schedule a daily email to each Agent + TC + Broker listing missing/expiring items and over-due dates; mirror each as a CRM task ("Upload signed SPDS (Seller)"). The digest becomes your "inbox zero" for compliance. (Brokermint is built for compliance tracking and reminders; lean on it.)

TC mini-SOP

Day 1 (after acceptance)	sanity check people, price, dates; request any absent disclosures.
Mid-escrow 10-min call	"Waiting on X; you owe Y; next signature Z by [date]."
T-2 business days	Confirm Clear to Close , prep payout and post-close automations.

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Step 5:

Automate commissions, deductions & payouts (ACH <24h)

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Commission plans & agent statements

Your TMS calculates company dollars, splits, and deductions, then exports/posts to your accounting software (QuickBooks) if you sync.

QuickBooks Online sync (optional)

Use the Brokermint-QBO workflow to create Bills/Expenses in QBO from Brokermint transactions; keeping GL clean and enabling fast ACH through your accounting flow

What to configure

Deductions	"Tool Recovery" (flat or % of company dollar , capped per deal). "Revenue Share" (if you adopt it; pay only from company dollar , not gross GCI).
Payout policy	"Payout within 24 hours of funding" (set a same-day task for TC/Accounting).
Statement transparency	show items by name so agents see what was recovered and why

Step 6:

Post-close automations (reviews + sphere)

On Brokermint status = Closed:

- **Email the client** a review link (Google) and **thank-you** note.
- **Enroll** them into **Homebot** and your **Quarterly Touch** Action Plan (from Point 3).
This keeps producers from forgetting the profit-protecting follow-through.

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Step 7:

Agent/TC one-pager

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• Agents

- **Never tour** without a signed **Buyer Rep & Compensation Agreement** (it's in your **Buyer Offer Pack**).
- Use **DocuSign templates** - don't build packets from scratch.
- Move your deal to **Under Contract** in the CRM **the same day** - this creates the Brokermint file.
- Reply to **red-flag** emails by EOD.

• TC

- Apply the correct **checklist template**; verify due dates.
- Run the **mid-escrow call**; document in TMS notes.
- Prep **ACH payout** and verify deductions (Tool Recovery, rev-share).

10-minute weekly QA

1. Random audit (3 files):

All checklists at 100% before funding?

2. Payout SLA:

Any deal >24h without paid statement? Investigate.

3. Template usage:

Pull DocuSign send log. Are agents using packs?

4. Stage logic:

Did **Under Contract** → **Brokermint file** fire for each? If not, re-connect the integration.

Copy-paste assets

DocuSign message (Buyer Offer Pack)

Subject: Buyer Documents for {{address}} (please review)

Body:

"Hi {{first_name}}, these are the standard buyer documents so we can tour and write offers quickly. I've highlighted your signature spots. Text me if any field is unclear. Happy to walk through."

Doc chase email (TC → Agent, auto when missing items)

Subject: Missing {{doc_name}} for {{address}} (due {{due_date}})

Body:

"Quick nudge. {{doc_name}} is due {{due_date}}. Upload to the checklist item (not the files tab) so compliance clears it."

Post-close review request

"Thank you again for trusting us with {{address}}. If we earned it, a quick Google review helps neighbors find us: {{review_link}}."

Compliance notes

- **Written buyer agreements:** Required before tours. Include in your Buyer Pack and add a **tour gate** in your checklist.
- **RESPA basics for gifts/discounts:** You **may** give modest consumer gifts for doing business with you, but **not** in exchange for referrals; no "\$ value" safe harbor - patterns matter. Keep gifts non-contingent and reasonable.

Owner's 15-minute smoke test (do this once)

- Send yourself each **DocuSign template** - verify roles/tabs, routing order, and required fields
- In CRM, flip a test deal to **Under Contract** - confirm a **TMS** file appears with mapped people & property
- In TMS, apply **Buyer** or **Listing** checklist; mark one item missing - confirm it appears in the **red-flag** email.
- Generate a **commission statement** with Tool Recovery (and revenue share if used); verify export to your accounting solution (test company).
- Mark **Closed** - ensure the **review email** fired and the client was **enrolled in Homebot** (Point 3)

5.

"Our listings look amateur and launch slowly."

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Amateur listings result in fewer offers, longer Days on Market, and more price cuts. In other words, lost GCI.

• Owner's outcome

- Every signed listing goes **live in <48 hours** with a 3D tour + full media pack
- **More exposure:** listings with Zillow 3D Home tours get **more views/saves** and can **sell faster** (free to publish)
- Clean brand consistency across flyers/IG/postcards; no design bottlenecks

• Why this matters

Zillow reports listings with a **3D Home tour** averaged **+43% views** and **+55% saves** vs. listings without. Sales get **up to 14% faster** on average with 3D Home. Zillow 3D Home is also **free to host**.

Matterport promotes higher engagement and faster sales (vendor studies; use for premium or complex properties where digital twins/floor plans add value).

Auto-confirm showings (Go & Show / Courtesy Call) cut delays; they're designed to confirm requests **immediately** for vacant/flexible homes.

What you need (10-minute checklist)

3D capture	Zillow 3D Home app (free hosting) or Matterport for premium (floor plans/digital twin).
Photography	pro stills (consider aerial where appropriate). (Vendor stats vary; use drone/aerial for large lots or unique locations.)
Showing scheduler	ShowingTime with Auto Confirm rules per listing.
Branding tool	Canva Brand Kit (lock logo, fonts, colors; preload templates).
Showing scheduler	your CRM to email buyer lists and log activity.

Step 1:

Lock your brand so anyone can produce on-brand assets

Create/refresh Brand Kit in Canva:

upload logo(s), set primary/secondary colors, upload brand fonts.

Preload templates (editable by agents/TC/marketing):

- 1-page flyer, 4×6 postcard, IG square, IG story, FB landscape, email header
- Include placeholders for: address, price band, 3 highlights, tour link, QR code

Share Brand Kit to your team so everyone uses the same assets.

Side note - speed: With a locked Brand Kit, any staffer can update all pieces in **<15 minutes** per listing.

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Step 2:

Choose the right 3D path per listing

Default: Zillow 3D Home

(fast, free, boosts marketplace visibility; interactive floor plans available).

Premium / complex homes:

Matterport (richer "digital twin," strong for out-of-area buyers or architecturally complex spaces)

Decision rule

If list price is above your market's median by $>30\%$, or layout is complex, book Matterport; otherwise capture Zillow 3D Home same day. (Zillow 3D benefits and zero hosting cost make it a no-brainer baseline.)

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Step 3:

The 48-Hour Launch SOP

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Assign this to your listing coordinator

Day 0 (Media Day)

Morning

- **Photographer + 3D capture** on site (Zillow 3D or Matterport). Zillow 3D tours earn more views/saves; prioritize capture **before** you set MLS live date.
- **Room list + shot list:** exterior front/back, main living, kitchen, primary suite, notable upgrades, and any space that "sells the lifestyle."
- **Aerial/drone** if lot/setting matters (views, acreage, waterfront access).

Afternoon

- **Load media** as soon as delivered; name files consistently (01-Front, 02-Kitchen...).
- **Create the copy** (use ChatGPT/Canva AI if needed); paste into MLS draft + Canva templates.
- **ShowingTime setup:**
Appointment Type = **Go & Show** or **Courtesy Call - Auto Confirm** if vacant/flexible; **Appointment Required** only if necessary (tenants, pets). **Auto Confirm** means requests are immediately confirmed - fewer delays.
Add access instructions (lockbox), contact notifications, and **Monday seller report** cadence.

Day 1

Morning

- **MLS live** (with 3D tour link). Zillow 3D tours are associated on Zillow/Trulia and can drive higher engagement.
- **CRM email** to hot buyers in price band/area (include tour link + 3 highlights).

Afternoon

- **Social pack**: publish IG/FB posts + story; use the same approved captions from your template.
- **Neighbor awareness**: generate postcard PDF from Canva; send to your print/mail vendor queue.

Day 2

- **Open house ad** (run a small, radius-based campaign; include tour link to pre-qualify interest).
- **VIP First-Look text** to high-intent buyers:
"Private first-look: **{{address}}**. Want me to hold a **20-min slot** this weekend?"

Step 4:

Showings & feedback wiring

- Use **Auto Confirm** wherever safe; set lockbox with app-based access and confirm your **access logs** are working (Supra/SentriKey). Auto Confirm reduces buyer wait times.
- Turn on **automatic feedback** + Monday **Listing Activity report** to sellers.

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10-Minute Weekly QA

1. Random 3 listings:

Do they have a **3D tour** attached in MLS/Zillow? (Zillow 3D is free; no excuses.)

2. Brand audit:

Are the flyer/post/social assets using **Brand Kit** colors/fonts?

3. ShowingTime settings:

Auto Confirm used where safe? Monday report scheduled?

4. CRM distribution:

Buyer email sent Day 1? VIP texts sent Day 2?

Copy-paste assets

IG/FB caption (short)

"Just listed: **{{address}}** - **{{1-line benefit}}**. Tour the home in **3D** and book a **20-minute first-look** before the weekend. [link]"

Email subject

"First-look: **{{address}}** + 3D tour (book a 20-min slot)"

Neighbor postcard headline

"Next-door just listed: **{{address}}**. See the **3D tour** and floor plan."

VIP text

"Private first-look: **{{address}}**. Want me to hold a **20-min slot** this weekend?"

Compliance & quality

- **Fair Housing:** keep copy focused on property features (price, condition, location); avoid protected-class language.
- **Accuracy:** verify bed/bath/feet and school info; rely on MLS data to avoid misrepresentation.
- **Accessibility:** add photo captions/alt text in web posts when possible.

6.

"We can't tell which tools and spends drive signed clients."

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In July 2025, the per-agent spend was at \$349.19. Money gets burned on silent sources; poor targeted coaching. Track ROI metrics with RightAlly.

• Owner's outcome

- One source of truth: **Leads → Contact% → Appt% → Signed% → Closed**, by **source, campaign, price band, agent, team**
- **\$/Signed** and **\$/Closed** by source/tool with **spend roll-ups**
- Automatic **coaching flags** (who needs "two-options" training vs. pricing consults) and **budget suggestions** you can approve
- Revenue operations connected end-to-end: CRM → RightAlly → Back Office (BrokerMint/QBO) → CDA & agent statements.

What you need (10-minute checklist)

CRM	Follow Up Boss (FUB) API key (for people, deals, lead source, stage changes).
Back office	BrokerMint API/connector (for company dollar, split, payouts).
RightAlly	Account + access to data connectors (acts as the orchestration & analytics hub).
Ad/lead costs	Monthly vendor invoices (Zillow, Ylopo, Real Geeks, Meta/Google) or CSV exports
UTM/source plan	Simple naming rules to keep "Facebook / Meta / FB" from splitting into three "sources"

Step 1:

Connect systems in the right order

1. CRM → RightAlly.

Grant API access so RightAlly can ingest: contacts (with **original source** and tags), **stage changes** (timestamps for New → Attempted → Engaged → Appt Set → Signed → Under Contract → Closed), activities (calls, texts), and assigned agent/team. (FUB is built for open integrations across 250+ lead sources.)

2. TMS → RightAlly.

Enable the connector so RightAlly receives: **company dollar**, **GCI**, **deductions** (Tool Recovery, etc.), **payout dates**, and **agent of record** - exactly what you need to compute **\$/Signed** and **\$/Closed** and to reconcile to real money. (Brokermint supports deep integrations for back office/General Ledger and agent billing.)

3. Costs → RightAlly.

Set up monthly cost ingestion (manually upload CSV or connect ad platforms). Map each invoice line to a **Source** and optionally **Campaign** (UTM). RightAlly stores it as "Spend."

Why RightAlly as the hub: It sits after your CRM and before/alongside your back office so it can normalize names, stitch funnels, and write results (e.g., rev-share/ Tool-Recovery context) back into your ops view.

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Step 2:

Normalize sources

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This step reduces 90% of the noise.

Create a **Source Dictionary** in RightAlly:

Raw value (as seen in FUB)	Normalized Source
fb, Facebook, Meta, IG	Meta
Google PPC, gads, pmax	Google Ads
Zillow, ZillowFlex	Zillow
RG, RealGeeks	Real Geeks
ylopo, ybot	Ylopo
SOI, Past Client	Sphere

• Owner's outcome

- If **UTM_Source** present → use it; else fall back to FUB "Source".
- Collapse obvious dupes.
- Tag "**Broker-Funded Tool Signal**" (Cloud CMA sent / ShowingTime used / Homebot engaged) per contact, so later we can prove "used on this deal" for CDA notes.

Step 3:

Map the funnel

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RightAlly ingests stage changes and computes funnel metrics:

$$\text{Contact\%} = \text{Engaged} \div \text{New}$$

$$\text{Appt\%} = \text{Appt Set} \div \text{Engaged}$$

$$\text{Signed\%} = \text{Signed} \div \text{Appt Set}$$

$$\text{Closed Rate} = \text{Closed} \div \text{Signed}$$

$$\text{\$/Signed} = \text{Spend} \div \text{Signed}$$

$$\text{\$/Closed} = \text{Spend} \div \text{Closed}$$

- Add **SLA rules** so it also computes execution quality:

→ **Speed-to-Lead:** % of New contacted <2 minutes (Point 1 target = 80%)

→ **Showings SLA:** % of requests confirmed <15 minutes (Point 2 target = 80%)

→ **Feedback Rate:** % of showings with feedback ≥50% (Point 2)

RightAlly displays by Source, Campaign, Price Band, ZIP, Agent, Team so owners can spot waste and coach quickly. (FUB & Brokermint provide the raw events & dollars; RightAlly orchestrates/joins.)

Step 4:

Ingest spend and tie it to outcomes

- Upload vendor invoices (Zillow/Ylopo/Real Geeks/Meta/Google) or connect platforms; RightAlly totals **Spend** per **Normalized Source/Campaign**.
- If a source lacks clear invoice tags, RightAlly lets you **allocate** by % (e.g., "Meta: 70% buyer, 30% seller campaigns").
- Result: you can read **\$/Signed** and **\$/Closed** by source with confidence - not just CPL. (Beware the classic mistake of optimizing to **CPL**; it often misleads.)

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Step 5:

Build the "Right-Now ROI" board

Columns (one row per **Source**; add Campaign for granularity):

Leads | Contact% | Appt% | Signed% | Closed | Spend | \$/Signed | \$/Closed | SLA Breaches (Speed/Showings/Feedback) | Tool Signals (CMA, Homebot, ShowingTime)

RightAlly flags rows **red/yellow/green**:

- Red on **SLA** (e.g., Contact% < 35% → likely execution, not lead quality)
- Red on **\$/Signed** trending up **2 months** → cut or fix
- Yellow on **Signed%** low → price-band CMA coaching
- Green on **Tool Signals** + Closed → auto-justify **Tool Recovery**

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Step 6:

Agentic AI (if X is low, do Y)

RightAlly ships **playbook rules** you can mirror for Problems 1 to 5:

- **Low Contact% (<35%)** → tighten initial text; expand on-duty coverage; verify CRM → ShowingTime wiring.
- **Low Appt% (<20%)** → train **two concrete time options**; insert Day-3 micro-CMA.
- **Low Signed% (<50% of appts)** → introduce **price-band CMA** earlier; ensure **Buyer Rep Agreement** before touring.
- **Low Feedback (<50%)** → shorten ShowingTime form; add same-day agent nudge.
- **Slow showings** → flip more listings to **Auto-Confirm** where safe.

RightAlly posts **agent-level cards** each Monday:

- "**Agent A:** Contact 22% (down) → Action: re-enable on-duty & use two-options script."
- "**Agent B:** Signed 38% (up) with Homebot spikes → share approach."

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Step 7:

Experiments & budget moves

RightAlly proposes **two actions** per month with one-click approvals:

- **Cut one loser:** Source where \$/Signed rose 2 months + SLA healthy → decrease budget 25%.
- **Double-down one winner:** Source with strong SLA + \$/Closed trending down → increase 20%.

You hit **Approve**, and ops updates the buy. (FUB keeps the front-end lead flow; TMS/Accounting platform reflect the downstream dollars; RightAlly is the decision spine)

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Step 8:

Light automations that close the loop (optional)

- **RightAlly → Brokermint context:** attach "Tool Signals present on this deal" so the Tool Recovery deduction is justified & transparent.
- **RightAlly → CRM tasks:** when Homebot spike or Saved-2+ homes events hit, auto-task "Send 1-page CMA + offer two times".
- **RightAlly → Slack/Email:** alert when a source's Contact% drops below 30% for 3 days (coverage gap).

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Copy-paste assets

Owner email (announce the new visibility)

Subject: We're turning on "Right-Now ROI"

Body: This week we connected **CRM → RightAlly → TMS**. You'll see your **Contact%**, **Appt%**, **Signed%**, and **\$/Signed** by source and agent each Monday, with coaching actions and one recommended budget cut/scale. If tool signals (Cloud CMA, Homebot, ShowingTime) appear on a deal, the CDA will show a named, post-split **Tool Recovery** line item.

Team-lead coaching note

"If Contact% <35%: use the **two-options** text on every first touch and expand on-duty hours this week. If Signed% <50% of appts: send a **1-page price-band CMA** at Day-3 and confirm a signed **Buyer Rep Agreement** before tours."



7.

**"We are losing an arm and a leg to eXp/
REAL-style growth as agents keep flocking
to them - even with up to 100% splits for the
top agents."**

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The revenue sharing model creates additional incentives for top-performing agents, especially the ones who specialize in team-building activities. Despite 100% splits, they tap superior benefits by switching to eXp and REAL styled payment structure.

- **Owner's Outcome**

- Launch a **cloud-style revenue-share** plan that retains producers and accelerates agent-led recruiting - **without** spreadsheets, disputes, or margin surprises.
- Sponsors get **transparent statements** and on-time payouts; finance keeps **hard guardrails** on spend.
- Culture doesn't drift: rev-share ties to , not hype.

- **Why this matters (trend and context)**

Cloud brokerages (eXp, Realty One, REAL) have leveraged **rev-share + cap models** to scale rapidly. Many brokerages lose producers to them not just for splits, but for **ongoing team earnings**.

To compete, you don't need to copy their entire model. You need a **kernel**: paid rev-share, gated by retention and behavior, automated end-to-end.

RightAlly specializes in this: it equips you with out-of-the-box revenue share workflows, sponsor statements, caps management, and guardrails - all cloud-first and aligned with the brokerage ops you've built.

What You'll Need (10-minute checklist)

- **RightAlly** account with **Revenue Share** module (handles tier logic, unlock rules, caps, clawbacks, sponsor statements, and payouts).
- Your **TMS/Accounting Solution** (e.g., Brokermint/QBO) and bank ACH rails; RightAlly consumes **company-dollar** and pushes back **payables** and journal entries.
- CRM roster (e.g., FUB) with **sponsor→ recruit** mapping and a way to tag **producing status**.
- A short **Revenue Share Policy** (tiers, unlocks, caps, compliance, clawbacks, mentor expectations).

Step 1:

Define Your Rev-Share Framework

→ **Pick your company split and cap** (eXp and REAL structures as reference): eXp-style: 80/20 with \$16k cap funded from company dollars.

Real-style: 85/15 with \$12k cap; set a **global monthly 60% payout ceiling** on company revenue allocated to revenue share.

→ Decide if you'll mirror **eXp's 50%-of-company-dollar** budget or **Real's 60% monthly ceiling**. RightAllly enforces a **hard budget**, pro-rating payouts if needed.

→ Define a **producing agent** for your plan (e.g., "One or more closed deals in 6 months or more than \$X company-dollar in the last 6 months"). Real's producing-agent policies and grace period provide a solid blueprint.

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Step 2:

Map Sponsor-Recruits in RightAlly

- In RightAlly: Go to **Rev-Share setup** → **Sponsorships**.
- Import your **sponsor-recruit pairs** (CSV with Sponsor Name, Recruit Name, Start Date).
- RightAlly maps each recruit's **company dollar** deals and applies the **tier logic** automatically.

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Step 3:

Automate payouts & statements

- RightAlly calculates monthly **rev-share amounts** per sponsor (based on recruit activity and tier).
- Exports to Brokermint or QBO as **Commission Bill** or **Expense** against sponsor.
- Brokermint issues a statement or agent payout detailing:
"Rev-Share Level 2 (3%) for keeping 5 active closers"
Total rev-share earned, and whether cap is reached or not
- Set **ACH payout** automatically if your banking supports it.
- Publish statements to sponsors via email or RightAlly portal.

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Step 4:

Tie Rev-Share to Culture

- **Sponsor obligations:** In RightAlly, attach to each sponsor entry:
Monthly touchpoints: "1 team huddle per month (min 3 attendees)"
Field activity: "Co-host 1 open house / recruit / quarter"
- RightAlly offers **flags when a sponsor doesn't meet obligations**. Pause revenue share until compliance.
- Attendance/compliance can be logged via mobile check-in or calendar event tagging.

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Step 5:

Track Performance & Adjust

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- RightAlly Rev-Share Dashboard shows:

- **Recruiting velocity** (new recruits per sponsor level)
- **Active vs. inactive recruits**
- **Rev-share per sponsor, total budget spent**
- **ROI per recruit:** compare rev-share spent vs. incremental deals closed vs. recruit cost
- Use this to adjust unlock thresholds, caps, or sponsor expectations quarterly.

Monthly Huddle Template

1. Rev-Share P&L:

Top spend, top ROI sponsors

2. Compliance flags:

any sponsors paused or frozen?

3. Recruitment metric:

new recruits, active %, top performers

4. Adjust next quarter's structure, thresholds, or caps

Need Help With Something?

We're happy to jump in if you hit a snag anytime during working hours.

Contact options



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- **For the fastest answer, include**

- The **section/step** you're on (e.g., "Step 1c: First-to-Claim")
- A **screenshot or short description** of what you see
- Your **CRM/TMS names** and any relevant lead source (e.g., Zillow, Ylopo)

- **Typical help we provide**

- Quick reviews of **lead flow & initial text** settings
- **ShowingTime + lockbox** confirmations and seller report setup
- **Automation sanity checks** (tasks, triggers, smart lists)
- **Compliance pointers** (TCPA, texting opt-outs, call recording language)*

*This playbook isn't legal advice. For jurisdiction-specific rules (TCPA/texting consent, recording disclosures, RESPA), consult your counsel and local guidelines.