RightAlly

Best Practices to Scale Your Brokerage 2026 Edition

The Critical Path Made Practical

A step-by-step implementation guide for U.S. brokerage owners who want predictable growth, clean data, fewer fire drills, and without replacing your entire tech stack.

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Why Does This Guide Exist?

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Most brokerages struggle not because they lack technology, but because their systems don't talk to each other, their data is messy, and their agents spend more time managing tools than closing deals.

This guide gives you:

- **10 operational building blocks** that compound over time
- **Exact configurations** you can implement yourself
- **Benchmarks** to know what's working
- **A 14-day timeline** so you don't get stuck in planning mode

Note: In this guide, the tools matter less than the workflow. Use what you have. Just configure it correctly

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The 10 Building Blocks

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1. Single Source of Truth

The Problem:

Leads disappear between systems. You can't measure conversion because stages are inconsistent. Loss reasons are vague or missing entirely.

The Outcome:

Every lead and client action is captured once, in one system, with clean stages and mandatory loss tracking.

Compatible With:

Follow Up Boss, Salesforce, HubSpot, Real Geeks, kvCORE, LionDesk, Chime

Setup (10-15 minutes)

Step 1: Create pipeline stages (use these exact names)

New → Contacted → Consult Set → Consult Held → Agreement Signed → Under Contract → Closed → Lost

Step 2: Add required fields on every new lead

- **Source** (picklist): The channel where they came from
- **Intent** (picklist): Buy / Sell / Both
- **Price_Band** (picklist; adapt as per your market): <$400k / $400-800k / $800k+
- **Timeframe** (picklist): 0-3 months / 3-6 months / 6-12 months / 12+ months

Step 3: Force loss tracking

Add **Loss_Reason** field (picklist): No Contact / Timing / Financing / Refused Agreement / Price Gap / Other

Create a validation rule: Cannot move to "Lost" without selecting a Loss_Reason

Step 4: Normalize your sources

Import this source dictionary into your CRM's mapping tool:

• Raw Source	• Collapse To
FB Lead	Meta
Instagram	Meta
Google PPC	Google
Google LSA	Google
Zillow Flex	Zillow
Zillow Premier	Zillow
Realtor.com	Realtor.com
Referral	Referral
Sphere	Sphere
Open House	Open House

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Step 5: Turn on alerts

- Mobile push notifications for "New" leads
- Email notifications for "New" leads

Success Metrics

- ≥95% of new leads have all four required fields filled
- 100% of "Lost" records have a Loss_Reason
- Zero duplicate contact records

10-Minute Audit

1. Export your 25 newest leads
2. Check for any missing Source, Intent, Price_Band, or Timeframe
3. Try to mark a test record as "Lost" without selecting a reason (system should block you)

If/Then Fix

IF 5%+ of new records are missing Source

THEN make Source required on import/API and add helper text: "Pick the closest channel. You can update it later."

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2. Contact Leads in Seconds

The Problem:

Leads get cold while sitting in queues. Manual dialing wastes agent time. You have no visibility into speed-to-contact.

The Outcome:

Median speed-to-lead ≤30 seconds. Contact rate ≥65%. No heroics required.

Compatible With:

- **CTI:** Aircall, RingCentral, Twilio Flex, JustCall, Dialpad
- **SMS:** CRM, Twilio, SimpleTexting, Sinch, Sakari
- **Round-robin:** CRM or Distribution Engine add-ons

Setup (15-20 minutes)

Step 1: Create two agent queues

- **On-Duty:** Live agents currently taking calls
- **Overflow:** Backup agents or AI/virtual assistant

Step 2: Create two auto-tasks in your CRM

- **Call Now** (due: immediately)
- **Second Call**(due: +7 minutes)

Step 3: Set routing rules

- New lead with no activity after 2 minutes → auto-reassign to Overflow
- Fire the same two tasks for Overflow

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Step 4: Build your Day-0 sequence

1. Call attempt #1 (now)
2. Leave 7-second voicemail
3. Send SMS
4. Call attempt #2 (+7 minutes, auto-scheduled)

Step 5: Compliance & recording

- Turn ON call recording for all conversations
- Enable legal disclaimer banner on outbound calls
- Set up SMS opt-out compliance (auto-handled by most platforms)

Copy/Paste Scripts

7-Second Voicemail:

"Hi, it's {{agent_name}}. I have texted you two time options. Can you please check what suits you better?"

Initial SMS:

"Hi {{first_name}}, it's {{agent_name}} from {{brokerage_name}}. I can hold a 30-minute window today 5-7pm or tomorrow 10am-12pm for {{property_area}}. Which should I block?"

Success Metrics

- Speed-to-lead median ≤30 seconds
- Contact rate ≥65%
- ≤10% of leads routed to Overflow

10-Minute Audit

1. Submit a test lead from each major source
2. Verify: Push alert arrives <5 seconds
3. Confirm: Lead assigned to On-Duty agent
4. Check: Call is logged, VM logged, SMS logged
5. Validate: Second call task auto-scheduled at +7 minutes

Step 5: Compliance & recording

- Turn ON call recording for all conversations

If/Then Fix

IF speed-to-lead >30 seconds on weekends

THEN add a light On-Duty shift Saturday/Sunday or enable SMS failover at T+60 seconds

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3. Written Buyer Services Agreement

The Problem:

Buyers tour without signed agreements. Compensation conversations turn into negotiations because no one showed the math upfront.

The Outcome:

100% of first showings preceded by signed buyer agreements. Median time from lead to signed agreement ≤3 days.

Compatible With:

- **E-sign:** DocuSign, PandaDoc, Dotloop, Lone Wolf Authentisign
- **Calculator:** Google Sheets, Excel, Notion template, RightAlly, or custom CRM object

Setup (15-20 minutes)

Step 1: Create e-sign template

- Upload your state-specific Buyer Services Agreement
- Add required initial boxes on all fee-related sections
- Set routing: Agent signs → Client signs

Step 2: Build a Fee Scenario Calculator (1-page)

Inputs:

- Purchase price
- Loan type (Conv / FHA / VA / Cash)
- Seller concession %
- Agent fee type (% or flat)

- Agent fee amount
- Seller offering buyer-agent compensation? (Y/N)

Outputs:

- Cash-to-close delta (if buyer pays vs. seller pays)
- Monthly payment delta
- Who pays what breakdown

Step 3: Automate the ask

- When deal stage is "Consult Set", create task "Send Buyer Agreement for e-sign" (due: now)

Step 4: Value Receipt automation

- auto-send Value Receipt email (see script below) 24 hours after consult

Step 5: Attach artifacts

- Every time an offer is discussed, upload signed agreement PDF and Fee Scenario snapshot to the deal

Copy/Paste Scripts

Services Agreement Opener (30 seconds):

- "We use a short written services agreement so you can see exactly what we do and how we're paid. You'll choose a fee option that works for you. It is legally mandated before all showings and only takes a couple of minutes to complete."

Value Receipt Email:

- **Subject:** What we've done for {{address}} so far

Hi {{first_name}},

Behind the scenes since we spoke:

- Screened 23 active listings in your area
- Removed 7 for insurance or condition issues
- Booked 3 tours for this weekend
- Drafted your offer outline

Two quick times to finalize next steps:

- {{first_time_option}}
- {{second_time_option}}

Which works better?

Success Metrics

- 100% of first showings have a signed agreement on file
- Median lead to signed agreement in 3 days

10-Minute Audit

1. Pull your 10 most recent first-time showings
2. Check each deal file for: Signed agreement PDF + Fee Scenario attachment
3. Calculate average days from "New" to "Agreement Signed"

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If/Then Fix

IF lead is signed in more than 4 days

THEN trigger automated Value Receipt email and schedule 10-minute "offer math" micro-review call

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4. Frictionless Showings

The Problem:

Back-and-forth texts to schedule showings. Delayed confirmations frustrate buyers. Sellers never get usable feedback. You can't diagnose pricing problems in week one

The Outcome:

≥80% of showings confirmed in <15 minutes. ≥50% feedback response rate. ≥6 first-week showings for properly priced listings.

Compatible With:

- **Scheduler:** ShowingTime, Calendly (for private showings), etc.
- **Lockboxes:** Supra, SentriLock

Setup (10-15 minutes)

Step 1: One-door policy Add this to all MLS remarks:

- "All showing requests via [ShowingTime link]. Texts not monitored."

Step 2: Configure Auto-Confirm

- Default: Auto-Confirm ON (instant approval)
- Require manual approval only for: pets in home, occupied by tenants, or alarm systems

Step 3: Smart lockbox attachment

- Attach electronic lockbox to every listing
- Set access hours (typically 9am-7pm)

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Step 4: Create 3-question feedback form

- **Price Fit?** (High / Right / Low)
- **Condition Notes?** (Open text, 1-2 sentences)
- **Likely to Offer?** (Yes / Maybe / No)

Step 5: Automate feedback requests

- Send at +24 hours if no response
- Send again at +48 hours if still no response

Step 6: Weekly Seller Report (auto-compile)

Every Monday at 9am, send seller report with:

- Showings count
- Online saves/favorites count
- Feedback themes (summary)
- Recommended next steps

Copy/Paste Scripts

Buyer Slot Confirmation Text:

"I can hold today 5:40-6pm or tomorrow 10:20-10:40am. Which should I lock in?"

Seller Monday Text (short):

"4 showings last week. Themes: yard is strong, hallway scuffs noted, price slightly high per 2 buyers.

Plan:

1. Touch-ups - Wednesday
2. Reassess pricing - Thursday."

Success Metrics

- ≥80% of showings confirmed <15 minutes
- ≥50% feedback response rate
- ≥6 first-week showings (for in-band priced listings)

10-Minute Audit

1. Submit a test showing request
2. Time the confirmation
3. Preview next Monday's auto-generated seller report
4. Send yourself the feedback form link and complete it

Step 6: Weekly Seller Report (auto-compile)

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10-Minute Audit

1. Submit a test showing request
2. Time the confirmation
3. Preview next Monday's auto-generated seller report
4. Send yourself the feedback form link and complete it

If/Then Fix

IF first-week showings <6

THEN verify: Auto-Confirm is enabled, Day-1 buyer email sent. Schedule pricing review by Day 7.

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5. 48-Hour Listing Launch (Media Pipeline + D1/D2 Distribution)

The Problem:

Listings sit "Coming Soon" for a week while you wait for photos. Buyers who were hot last Tuesday have moved on by the time you go live.

The Outcome:

Listings go live within 48 hours with pro media. Day-1 buyer blast and Day-2 VIP SMS reach your best prospects immediately.

Compatible With:

- **Media:** Matterport, Zillow 3D, CloudPano, HDPhotoHub, BoxBrownie, Kuula
- **Email:** Mailchimp, HubSpot, Constant Contact, CRM
- **SMS:** CRM, Twilio, SimpleTexting, Sakari, Sinch

Setup (15-20 minutes)

Step 1: Lock down media checklist

Every listing must have (before going live):

- Professional photos (20-30 2D images; 6-12 3D images)
- 2D floor plan
- 3D virtual tour link

Step 2: Reserve standing vendor slots

- Tuesday 9-11 AM (shoot slot #1)
- Thursday 9-11 AM (shoot slot #2)
- This prevents drift and ensures 48-hour delivery

In case you don't have a vendor available nearby, purchase or rent a 3D camera and a tripod and get the images clicked via Matterport or Zillow 3D. The 3D walkthroughs are relatively easy to configure.

Step 3: Day-0 workflow

- Capture photos/video
- Upload to editing vendor/Matterport/Zillow 3D
- Create MLS draft with 3D link embedded
- Set ShowingTime scheduler rules

Step 4: Day-1 Buyer Blast Target segment:

Contacts with saved searches matching this property and high-intent buyers in this price band

Email subject:

"New Listing: {{address}} (First Look)"

Step 5: Day-2 VIP First-Look SMS Same segment as Day-1 email

Copy/Paste Scripts

VIP First-Look SMS:

"Private first look: {{address}}. Want me to hold a 20-minute slot this weekend? Reply Y and I'll send two times."

Success Metrics

- Media live ≤48 hours from listing agreement signed
- Day-1 email delivered to target segment

- Day-2 SMS sent to target segment
- ≥6 first-week showings

10-Minute Audit

1. Pull your last 3 active listings
2. Check each for: 3D tour link present, Day-1 email send log, Day-2 SMS send log
3. Calculate average hours from agreement signed to MLS live

If/Then Fix

IF media delivery >48 hours

THEN add missed-SLA penalty to vendor agreement and enforce standing Tuesday/Thursday slots; or buy or rent your 3D camera and get going

6. Transaction Management That Prevents Fire Drills

The Problem:

Missing documents discovered at closing. Agents chase TCs. TCs chase agents. Payouts take a week. Compliance defects trigger post-close audits.

The Outcome:

Zero missing-doc defects per file. Predictable payouts (ACH <24 hours from funding). Fewer escalations.

Compatible With:

- **TMS/Back Office:** Brokermint, SkySlope, Dotloop, Transaction Desk, Paperless Pipeline
- **Accounting:** QuickBooks Online, Xero

Setup (20-30 minutes)

Step 1: Create checklists for each transaction type

- **Buyer Checklist** (25-30 items with owners and due dates)
- **Listing Checklist** (20-25 items with owners and due dates)
- **Referral Checklist** (5-10 items with owners and due dates)

Step 2: Automate file creation

When CRM stage is "Under Contract", auto-create TMS file with:

- All parties (buyer, seller, agent, TC)
- Property address
- Appropriate checklist applied

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Step 3: Daily Red-Flag Digest

Every morning at 8 AM, email summary of:

- Missing documents (by file)
- Expiring deadlines (next 48 hours)
- Owner assigned to each item

Step 4: Mid-escrow check-in (mandatory)

At day 15 of 30-day escrow (or midpoint):

- 10-minute call with agent and TC
- Review: What's missing, who owns it, deadlines

Step 5: Payout automation

- Commission plan calculates company dollar, franchise fees, and transaction fees
- Agent portal shows payout statement
- ACH is <24 hours from funding confirmation

Copy/Paste Scripts

Red-Flag Email Subject:

"ALERT: File gaps for {{property_address}} (Due {{due_date}})"

Mid-Escrow Check-In Agenda:

1. Documents still needed (who's getting them?)
2. Upcoming deadlines for next 7 days
3. Anything stuck such as lender, title, inspection, etc.?

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Success Metrics

- 0 compliance defects per closed file
- 100% of "Under Contract" deals auto-create TMS file within 5 minutes
- Agent payout <24 hours from funding

10-Minute Audit

1. Move a test deal to "Under Contract"
2. Verify: File created in TMS
3. Verify: Correct checklist attached
4. Verify: Red-flag digest includes this file
5. Verify: Payout statement generated (even if $0 placeholder)

If/Then Fix

IF same agent appears in Red-Flag digest two days in a row

THEN pause new lead routing to that agent until file is cleared

IF errors in payout calculation and automation

THEN use RightAlly for calculations and disbursements

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7. Reviews & Local Discovery

The Problem:

You ask for reviews sporadically. Response rate is 5%. Negative reviews sit unanswered for days. Your Google Business Profile has 12 reviews while your competitor has 200.

The Outcome:

3-6 new Google reviews per producing agent per quarter. 100% of reviews responded to within 24 hours. Improved local search visibility.

Compatible With:

Google Business Profile, GatherUp, Grade.us, Birdeye, NiceJob

Setup (10-15 minutes)

Step 1: Get agent-specific review links

- Each agent needs their own Google Business Profile (if operating as individual entities) OR
- Create personalized review links that tag the agent in your brokerage profile

Step 2: Three automated ask-moments

- **Soft ask after consultation** when deal stage is "Consult Held"
- **At mutual acceptance** when deal stage is "Under Contract"
- **One day after funding** when deal stage is "Closed" +1 day

Step 3: Set response SLA

- All reviews must receive a response within 24 hours
- 3-star and below reviews auto-escalate to manager

Step 4: Embed links in templates

Store review links in CRM and embed in:

- SMS templates
- Email templates
- Transaction milestone messages

Step 5: Optional in-process ask

For slow months, add a fourth ask moment:

- Right after tour-prep or offer-prep call (before closing)
- Only for highly satisfied clients (qualify with: "On a scale of 1-10, how's your experience so far?")

Copy/Paste Scripts

Review Ask (SMS):

"If we've earned it, a quick Google review helps neighbors in {{city}} find us: {{review_link}}. Thank you!"

Review Ask (Email):

Subject: One quick favor?

Hi {{first_name}},

If our service met your expectations, would you share your experience on Google? It helps families in {{city}} find us.

Leave a review here: {{review_link}}

Thank you for trusting us with {{address}}.

Response Template (Positive Review):

"Thank you, {{reviewer_name}}! We're grateful you trusted us with {{address}}. Wishing you all the best in your new home.

- {{agent_name}}"

Response Template (Negative Review - Manager):

"Thank you for the feedback. We're sorry we didn't meet your expectations. I'd like to understand what happened and make it right. Please reach out directly: {{manager_email}} or {{manager_phone}}.

- {{manager_name}}, Broker"

Edit the response and add 'UPDATE: " below your previous response once the query gets resolved or there is an update. Avoid badmouthing the customer in case of further escalation. Put your point forward politely.

Success Metrics

- 3-6 new Google reviews per producing agent per quarter
- 100% of reviews responded to ≤24 hours
- Monthly review count trending up

10-Minute Audit

1. Send yourself all three automated review ask messages
2. Leave a dummy internal "test" review on your profile

3. Verify: Manager receives escalation notification for ≤3-star reviews
4. Check: Response timer starts and alerts fire if 24 hours pass

If/Then Fix

IF office monthly reviews <target

THEN add in-process ask after tour-prep call (4th touchpoint) and incentivize responses with small thank-you gift

8. Micro-Area Pages

The Problem:

100% of your leads come from Zillow, Realtor.com, and paid ads. When budgets get cut, leads dry up overnight. You own no audience.

The Outcome:

Predictable inbound leads from organic search, independent of portal spend. Cost per lead decreases month over month.

Compatible With:

- **CMS:** WordPress, Webflow, Squarespace, Wix
- **Data:** Redfin Data Center, local MLS stats, Zillow market data
- **Forms:** Typeform, Jotform, native website forms, CRM forms

Setup (30-40 minutes)

Step 1: Create micro-area page template

Required sections:

1. **What to Know About {{Area}}**
   - School districts
   - HOA rules (if applicable)
   - Insurance considerations (flood, wildfire, etc.)
   - Walkability / transit access
2. **Live Listings Module**
   - Auto-populated from MLS or IDX feed
   - 6-12 current listings displayed

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3. Two Market Trend Charts

- Chart 1: Inventory trend (last 12 months)
- Chart 2: Days on Market trend (last 12 months)

3. CTA: "Book 15-Minute Plan Call"

- Show two specific time slots
- Link to scheduling page or pre-filled form

Step 2: Publish 10 micro-areas

Target neighborhoods, condo buildings, or school zones where you have expertise or inventory.

Step 3: Weekly content cadence

For each area, publish:

- 1 market stat update (e.g., "Inventory in {{Area}} dropped 12% this month")
- 1 listing story (e.g., "Why 123 Main St sold in 4 days")

Step 4: Form to CRM integration

When someone fills out a form on a micro-area page:

- Create contact in CRM
- Set Source = "Owned: {{Area}}"
- Assign to On-Duty queue

Step 5: Add low-friction CTA (optional but recommended)

"Text me a price band for {{Area}}" [Pre-filled SMS link opens with: "Hi, I'm looking at homes in {{Area}}. Can you send me a price band?"]

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CTA Button Text:

"See Your Price Band (3 min)"

Market Stat Update Example:

"{{Area}} Update: Inventory fell 8% in {{month}} while Days on Market climbed to 32 (vs 28 in {{prev_month}}). Translation: Properly priced homes still move fast, but overpriced listings are sitting. [Book a 15-minute plan call]"

Listing Story Example:

"Why 123 Main St Sold in 4 Days:

Priced at market ($585k), freshly painted, and offered a $10k buyer-agent fee. It got 14 showings in 6 days. Two offers. Closed at $595k.

Takeaway: Condition + pricing + agent compensation = speed. [See current {{Area}} listings]"

Success Metrics

- Leads per page per month
- CTA conversion rate (form fills ÷ visitors)
- Email click-through rate on micro-area update emails

10-Minute Audit

1. Open each of your 10 micro-area pages
2. Verify that at least 2 content updates published in last 30 days

3. Test: Submit form and confirm it creates CRM contact with correct Source
4. Check market trend charts are current (data <30 days old)

If/Then Fix

IF traffic is good but leads are low

THEN add low-friction "Text me a price band" CTA and A/B test above-the-fold placement

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9. One Dashboard for Decisions

The Problem:

You have 5 different dashboards. None match each other. You can't tell which lead source is profitable. Budget decisions are made on gut feel.

The Outcome:

One source of truth for all funnel metrics. You can reallocate budget and coaching resources in one 30-minute meeting.

Compatible With:

- RightAlly, Looker Studio, Power BI, Tableau, Metabase, Klipfolio

Setup (40-60 minutes)

Required sections: RightAlly is the best tool for this use case as it is custom-built for real estate brokerages and seamlessly merges multiple data sources to extend actionable insights.

Step 1: Connect data sources

- CRM (stages, activities, timestamps)
- TMS (company dollar, agent dollar, transaction fees)
- Ad spend (CSV upload or connect with API for Meta, Google, Zillow)

Step 2: Define dimensions (rows)

- Source (Meta, Google, Zillow, Referral, Sphere, etc.)
- Agent
- Office
- Price_Band (<$400k, $400-800k, $800k+)
- Month

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Step 3: Define metrics (columns in this exact order)

1) Leads

2) Contact% (Contacted ÷ Leads)

3) Consult Set% (Consult Set ÷ Contacted)

4) Agreement Signed% (Agreement Signed ÷ Consult Set)

5) Closed (count)

6) Spend ($)

7) $/Signed (Spend ÷ Agreement Signed)

8) $/Closed (Spend ÷ Closed)

9) SLA Breaches (count of speed-to-lead >2 min)

10) Top Loss Reasons (mode of Loss_Reason field)

Step 4: Apply color rules (conditional formatting)

Use these thresholds (from Benchmarks section):

- Contact% <65% → Red
- Consult Set% <40% → Red
- Agreement Signed% <70% → Red
- $/Signed >$600 (for <$400k) → Red
- $/Signed >$1,000 (for $400-800k) → Red
- SLA Breaches >5% → Red

Step 5: Weekly one-thing rule

Every Monday, pick ONE red metric. Ship a fix within 14 days. Don't try to fix everything at once.

Copy/Paste Column Headers

"Leads | Contact% | Consult% | Signed% | Closed | Spend | $/Signed | $/Closed | SLA | Loss Reasons"

Success Metrics

- Board refreshes daily (auto-scheduled)
- Costs reconcile to invoices within ±1%
- 3 random lead spot-checks match board data

10-Minute Audit

1. Reconcile last month's total ad spend: Board vs. actual invoices
2. Open 3 random leads in CRM
3. Verify their stage timestamps match what the board shows

If/Then Fix

IF $/Signed rises for 2 consecutive months for a given source

THEN freeze spend on that source, identify the weakest funnel step (use the board columns), fix that step, re-test in 14 days

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10. Security, Privacy & Uptime

The Problem:

Agents share logins. Former employees still have access. A cyberattack locks your CRM. A data breach exposes client SSNs.

The Outcome:

Fewer "oh no" moments. No shared logins. Automatic access revocation on offboarding. Reduced data breach risk.

Compatible With:

- **SSO/MFA:** Google Workspace, Microsoft Entra ID (formerly Azure AD), Okta
- **Password vault:** 1Password Business, LastPass Business, Dashlane

Setup (20-30 minutes)

Step 1: Enable MFA everywhere

Turn on multi-factor authentication for:

- CRM
- Transaction management system
- Email
- Cloud storage (Google Drive, Dropbox, etc.)

Step 2: Create role matrix (least privilege)

Define exactly what each role can access:

Role	CRM Access	Export	TMS Access	Financial Reports
Agent	Own leads only	Blocked	Own files only	Own payouts only
ISA	Assigned leads	Blocked	None	None
TC	All files	Allowed	Full	None
Manager	Full	Allowed	Full	Full
Finance	Full	Allowed	Full	Full

Step 3: Block exports for Agents

Turn on multi-factor authentication for:

In your CRM:

- Remove "Export Contacts" permission for Agent role
- Remove "Bulk Export" permission for Agent role
- Allow only Manager and Finance roles to export

Step 4: Create offboarding checklist

When an employee leaves, this form auto-revokes:

- CRM access
- Email access
- TMS access
- MLS access
- Lockbox access
- Slack/Teams access

Use a tool like BambooHR or a simple Zapier/Make automation to trigger revocations.

Step 5: Weekly backups

Auto-backup these critical tables weekly to encrypted cloud storage:

- Contacts
- Deals/Opportunities
- Transaction files
- Agent payouts

Success Metrics

- 100% MFA enrollment across all systems
- 0 shared logins detected
- Quarterly access review completed on time

10-Minute Audit

1. Log in as a test "Agent" role user
2. Try to export contacts (should be blocked)
3. Check MFA status for 5 random users
4. Verify last backup completed successfully

If/Then Fix

IF shared login detected

THEN disable account immediately, create individual accounts with MFA, re-enable only after MFA confirmed

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Minimal Automations

Don't automate everything. Automate these five workflows:

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1. New Lead → Tasks + SLA Timer

Trigger:

New lead created

Actions:

- Create task "Call Now" (due: now)
- Create task "Second Call" (due: +7 minutes)
- Start 2-minute SLA timer
- If no activity at 2:00, reassign to Overflow queue

2. No Answer → SMS + Re-Call

Trigger:

Call disposition = "No Answer"

Actions:

- Send Initial SMS (see script in Block 2)
- Create task "Re-call" (due: +7 minutes)

3. Consult Booked → Agenda + Agreement Task

Trigger:

Deal stage = "Consult Set"

Actions:

- Email consultation agenda to client
- Create task "Send Buyer Agreement for e-sign" (due: now)

4. Under Contract → TMS File + Checklist + Red-Flag

Trigger:

Deal stage = "Under Contract"

Actions:

- Create TMS file with parties + property
- Apply appropriate checklist (Buyer/Listing/Referral)
- Add to next morning's Red-Flag digest

5. Funded → Payout + Reviews + Homeowner Plan

Trigger:

Deal stage = "Closed" + funding confirmed

Actions:

- Calculate agent payout (company $ + fees)
- Send payout statement to agent portal
- Initiate ACH transfer
- Send review ask via SMS + email
- Enroll client in homeowner/seller digest (quarterly check-ins)

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Benchmarks to Tune Monthly

Use these as your starting targets. Adjust based on your market, price points, and competitive landscape.

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Metric	Target
Speed-to-lead (median)	≤30 seconds
Contact rate	≥65%
Contact → Consult Set	≥40%
Consult → Agreement Signed	≥70%
First-week showings	≥6 (for in-band pricing)
Signed before first showing	100%
Missing-doc defects	0 per file
Agent payout timing	<24 hours from funding
Reviews per producing agent	3-6/quarter
Review response time	100% ≤24 hours
CAC/Closed (<$400k price band)	≤$2,000
CAC/Closed ($400-800k price band)	≤$3,500
CAC/Closed (>$800k price band)	≤5% of GCI

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14-Day Implementation Calendar

Follow this schedule to go from planning to fully operational in two weeks.

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Week 1: Core Infrastructure

Monday (3-4 hours)

- Morning: Block 1: CRM fields, stages, validation rules
- Afternoon: Block 2: Routing, CTI integration, SMS setup

Tuesday (2-3 hours)

- Morning: Block 3: E-sign templates, fee calculator
- Afternoon: Value Receipt email template, automation setup

Wednesday (2-3 hours)

- Morning: Block 4: Scheduler configuration, lockbox setup
- Afternoon: Feedback forms, Monday seller report automation

Thursday (2-3 hours)

- Morning: Block 5: Media vendor standing slots, checklist creation
- Afternoon: Day-1 buyer blast template, Day-2 VIP SMS template

Friday (3-4 hours)

- Morning: Block 6: CRM → TMS integration, checklists, Red-Flag digest
- Afternoon: Payout calculation setup, agent portal configuration

Week 2: Growth & Optimization

Monday (2-3 hours)

- Morning: Block 7: Review automation (3 ask-moments), response SLA
- Afternoon: Manager escalation rules, agent review link setup

Tuesday (3-4 hours)

- Morning: Block 8: Create 10 micro-area page templates
- Afternoon: Form → CRM integration, publish first 5 pages

Wednesday (3-4 hours)

- Morning: Complete and publish remaining 5 micro-area pages
- Afternoon: Block 9: Connect BI data sources (CRM, TMS, ad spend)

Thursday (2-3 hours)

- Morning: Build BI board with dimensions, metrics, color rules
- Afternoon: Block 10: Security hardening (MFA, roles, export blocks)

Friday (3-4 hours)

- Morning: Run all 10-minute audits for Blocks 1-10
- Afternoon: Document any red items, assign fixes, publish board to team

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Quick-Start Checklist

Use this as your master checklist. Check off each item as you complete it.

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Block 1: Single Source of Truth

[ ] Pipeline stages created (exact names)

[ ] Required fields added (Source, Intent, Price_Band, Timeframe)

[ ] Loss_Reason field created + validation rule enabled

[ ] Source dictionary imported and mapped

[ ] Mobile push + email notifications turned on

[ ] 10-minute audit passed

Block 2: Contact in Seconds

[ ] On-Duty and Overflow queues created

[ ] Two auto-tasks configured (Call Now, Second Call)

[ ] 2-minute SLA timer + Overflow routing rule set

[ ] Day-0 sequence built (Call → VM → SMS → Call)

[ ] Call recording + legal disclaimer enabled

[ ] 10-minute audit passed

Block 3: Agreement & Compensation

[ ] E-sign template created (state-specific Buyer Agreement)

[ ] Fee Scenario calculator built (1-page)

[ ] "Send BRA" task automation configured

[ ] Value Receipt email template created + automation set

[ ] Artifact attachment workflow tested

[ ] 10-minute audit passed

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Block 4: Showings Without Friction

[ ] "One door" policy added to MLS remarks

[ ] Auto-Confirm enabled (with exceptions noted)

[ ] Smart lockboxes attached to listings

[ ] 3-question feedback form created

[ ] Feedback auto-requests set (+24h, +48h)

[ ] Monday 9am Seller Report automated

[ ] 10-minute audit passed

Block 5: 48-Hour Listing Launch

[ ] Media checklist created (photos, floor plan, video, 3D)

[ ] Standing vendor slots reserved (Tue/Thu 9-11 AM)

[ ] Day-0 workflow documented

[ ] Day-1 Buyer Blast email template created + segment defined

[ ] Day-2 VIP SMS template created + segment defined

[ ] 10-minute audit passed

Block 6: Transaction Management

[ ] Checklists created (Buyer, Listing, Referral)

[ ] CRM → TMS auto-file creation configured

[ ] Daily Red-Flag digest scheduled (8am)

[ ] Mid-escrow check-in protocol documented

[ ] Payout automation configured (calculation + ACH)

[ ] 10-minute audit passed

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Block 7: Reviews & Local Discovery

[ ] Agent-specific review links obtained

[ ] Three ask-moment automations configured

[ ] Response SLA set (24 hours)

[ ] Manager escalation rule enabled (≤3★)

[ ] Review links embedded in SMS/email templates

[ ] 10-minute audit passed

Block 8: Owned Demand

[ ] Micro-area page template created (4 required sections)

[ ] 10 micro-areas selected and published

[ ] Weekly content cadence scheduled (1 stat + 1 story)

[ ] Form → CRM integration configured with Source mapping

[ ] Low-friction SMS CTA added

[ ] 10-minute audit passed

Block 9: One Board for Decisions

[ ] Data sources connected (CRM, TMS, ad spend)

[ ] Dimensions defined (Source, Agent, Office, Price_Band, Month)

[ ] Metrics configured (10 columns in exact order)

[ ] Color rules applied (threshold-based)

[ ] Weekly one-thing rule established

[ ] 10-minute audit passed

Block 10: Security, Privacy & Uptime

[ ] MFA enabled for all critical systems

[ ] Role matrix defined (least privilege)

[ ] Export permissions blocked for Agent role

[ ] Offboarding checklist created + tested

[ ] Weekly backup scheduled (critical tables)

[ ] 10-minute audit passed

Common Implementation Mistakes

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Mistake #1

Trying to implement everything in Week 1

Fix: Follow the 14-day calendar. One block at a time. Resist the urge to skip ahead.

Mistake #2

Skipping the 10-minute audits

Fix: The audits catch 90% of configuration errors before they affect real leads. Never skip them.

Mistake #3

Creating too many custom fields

Fix: Stick to the required fields listed in Block 1. Add more only if you'll actually use them in your board or automations.

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Mistake #4

Over-automating before processes are stable

Fix: Run each process manually for 2 weeks before automating. Learn where things break and where automation can really help.

Mistake #5

Building a BI board but never looking at it

Fix: Schedule a standing Monday 9 AM meeting. Pull up the board. Pick one red metric. Assign a fix.

Mistake #6

Not documenting your config

Keep a simple Google Doc or Notion page with:

- Date implemented
- Who configured it
- Where to find it (exact clicks)
- Test account credentials

Mistake #7

Letting agents bypass the system

Fix: If speed-to-lead SLA is breached, pause lead routing to that agent. No exceptions. The system only works if everyone uses it.

Mistake #8

Adding new lead sources without updating your board

Fix: Every new source gets added to your source dictionary (Block 1) and your BI board (Block 9) on Day 1.

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Maintenance Schedule

Once implemented, maintain the system with these regular tasks:

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Daily (5 minutes)

[ ] Check Red-Flag digest (Block 6)

[ ] Verify BI board refreshed overnight (Block 9)

Weekly (30 minutes)

[ ] Monday 9 AM: Review BI board, pick one red metric, assign fix

[ ] Publish 10 micro-area content updates (1 stat + 1 story per area)

[ ] Spot-check 3 random leads for data quality

Monthly (2 hours)

[ ] Review benchmarks: Are targets still appropriate?

[ ] Reconcile ad spend: Board vs. invoices

[ ] Offboard any departing agents (revoke access)

[ ] Review MFA enrollment: 100% compliance

[ ] Update micro-area market trend charts

Quarterly (4 hours)

[ ] Full access review: Remove any unused accounts

[ ] Vendor performance review: Media, lockboxes, TMS

[ ] Agent training: Any new features or process changes

[ ] Backup restoration test: Can you actually recover from backups?

When to Hire vs. When to Automate

Not everything should be automated.

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Here's the decision framework:

Automate When:

- Task happens >10 times per week
- Task has zero judgment required
- Failure is immediately visible
- Example: Creating TMS file when deal hits "Under Contract"

Hire When:

- Task requires human judgment
- Task is one-off or irregular
- Relationships matter more than speed
- Example: Negotiating repair requests, counseling anxious buyers

Hybrid Approach (Best for Most Tasks):

- Automation handles the triggering and reminders
- Human handles the actual execution
- Example: System creates "Send BRA" task → Agent reviews, personalizes, sends

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ROI Calculator

Use this simple framework to estimate your return on this implementation

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Time Saved

- **Before:** 12 hours/week chasing missing docs, manually following up, answering "Where's my payout?" emails
- **After:** 2 hours/week (10 hours saved)
- **Value:** 10 hours × $20/hour × 50 weeks = **$10,000/year**

Previously Lost Leads Converted

- **Before:** 150 leads/month, 50% contact rate = 75 contacted
- **After:** 150 leads/month, 65% contact rate = 97.5 contacted (+22.5)
- **Conversion improvement:** 22.5 × 40% consult × 70% signed × 30% closed = approx. **2 extra closings/month**
- **Value:** 2 × $8,000 avg GCI × 12 months = **$192,000/year**

Return on Ad Spend

- **Before:** $10,000/month spend, unclear ROI
- **After:** Reallocate $2,000/month from underperforming sources to top performers
- **Value:** $2,000/month × 12 months = **$24,000/year saved**

Total First-Year ROI

Time saved + leads converted + cost savings = **$226,000/year**

- **Implementation cost:** ~80 hours of your time + maybe $500 in new tool subscriptions
- **Payback period:** <2 weeks

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Getting Your Team On Board

Your system only works if your agents use it.

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Here's how to get adoption:

Week 1: Announce the "Why"

- Schedule all-hands meeting
- Share: "We're losing 30% of leads because our systems don't talk to each other. We're fixing it. Here's how."
- Show the 14-day timeline
- Assign one "tech champion" per office

Week 2-3: Train in Small Groups

- 30-minute sessions, max 5 agents per session
- Show them: "Here's how the new system makes YOUR life easier"
- Focus on agent benefits (faster payouts, fewer fire drills, automatic reminders)

Week 4: Go Live with Support

- Support available 9 AM - 5 PM for questions
- Daily 15-minute "office hours" via Zoom for first 2 weeks
- Create a #new-system-questions Slack channel

Week 5+: Reinforce with Data

- Weekly email: "Top 3 agents by speed-to-lead this week"
- Monthly email: "Agents who got paid <24 hours: 95%"
- Celebrate wins publicly

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What Not to Do

- Don't roll out all 10 blocks on Day 1
- Don't make it optional ("Use the new system if you want")
- Don't skip training because "it's intuitive"
- Don't blame agents when they don't adopt; fix the system or the training

Troubleshooting Guide

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Problem: Speed-to-lead is still >30 seconds

Diagnosis:

1. Check: Are push notifications enabled on agents' phones?
2. Check: Is the On-Duty queue actually staffed during business hours?
3. Check: Is CTI integration logging calls correctly?

Fix: Run the Block 2 audit again. Most issues are misconfigured routing rules.

Problem: Agents aren't getting signed agreements before showings

Diagnosis:

1. Check: Is the "Send BRA" task being created when the deal hits "Consult Set"?
2. Check: Are agents dismissing the task without completing it?
3. Check: Is the e-sign template broken or confusing for clients?

Fix: Make it impossible to create a showing without signed agreement. Add validation rule: "Cannot create Showing task if Agreement Signed = FALSE."

Problem: BI board numbers don't match reality

Diagnosis:

1. Check: Did you reconcile ad spend invoices vs. board?
2. Check: Are agents creating deals in "Agreement Signed" stage without moving through earlier stages?
3. Check: Is your CRM → TMS integration dropping records?

Fix: Run the Block 9 audit. Spot-check 10 random leads and trace their journey manually.

Problem: First-week showings are still <6

Diagnosis:

1. Check: Is the 3D tour link live and embedded in MLS?
2. Check: Did Day-1 email and Day-2 SMS actually send?
3. Check: Is Auto-Confirm enabled in ShowingTime?
4. Check: Is pricing in-band for the neighborhood?

Fix: Run the Block 4 and Block 5 audits. If tech is working, the problem is pricing or positioning, not the system.

Problem: Review asks aren't converting

Diagnosis:

1. Check: Are you asking at the right moments? (Post-consult is too early for most clients)
2. Check: Is the review link broken or sending to wrong profile?
3. Check: Are you asking for Google reviews but linking elsewhere (like your website instead of review page)?

Fix: Move your first ask to mutual acceptance instead of post-consult.
Test all links yourself.

Problem: Agents are still exporting contact lists

Diagnosis:

1. Check: Did you actually block "Export" permission for Agent role?
2. Check: Are agents using a manager's login to bypass restrictions?

Fix: Run the Block 10 audit. Audit login logs weekly. Revoke access for any shared-login violations.

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Final Thoughts :
The Compound Effect

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This system doesn't create overnight miracles. It creates a compound effect:

- **Month 1:** Systems are configured. The team is trained. You're still figuring out kinks.
- **Month 2:** Speed-to-lead improves. Contact rate climbs. You start closing extra deals.
- **Month 3:** BI board shows, say, Zillow is burning cash. You reallocate $2k/month to Google. ROI improves.
- **Month 6:** Your micro-area pages rank on page 1. You get your first organic lead. Then two more.
- **Month 12:** You've closed 20 extra deals (from improved contact rate + owned demand). Your cost per closing has dropped 30%. Your agents love the automated payouts and clean data.

The system only works if you work the system.

That means:

- Running the 10-minute audits. They catch 90% of problems.
- Attending the Monday 9 AM board review. Pick one red metric and fix it.
- Enforcing the standards. No bypassing, no shortcuts.

Technology doesn't scale your brokerage. **Disciplined execution scales your brokerage.** Technology just makes disciplined execution possible at 50 agents instead of 5.

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