RightAlly

AGENT RETENTION RISK ASSESSMENT

Which of Your Agents Is Planning to Leave? Find Out Before They Have the Conversation.

Score each of your top five producers. 8 questions. Identify the agents at risk now — before they have already made the decision.

Your name: ________________________ **Brokerage:** ___________________ **Date:** ____________

How to use this assessment: Complete one column for each of your top five producing agents. Answer each question honestly based on what you have observed in the last 60–90 days. Score each answer using the scale shown. Add each agent's column to get their total risk score. Use Section 2 to interpret each score and Section 3 for immediate next steps.

SECTION 1

The At-Risk Agent Scorecard

Complete one column per agent — your top 5 producers

Score each answer: **1 = No / Not observed** **2 = Unsure / Possibly** **3 = Yes / Definitely**

Question	Agent 1 ____	Agent 2 ____	Agent 3 ____	Agent 4 ____	Agent 5 ____
Q1 **Has this agent's transaction volume declined in the last 90 days?** *A drop in active pipeline is the strongest single predictor of switching risk.*	___	___	___	___	___
Q2 **Has this agent stopped asking questions about the brokerage's future plans?** *Disengaged agents stop investing mentally in the brokerage's direction.*	___	___	___	___	___
Q3 **Has this agent reduced attendance at brokerage meetings or team events?** *Physical withdrawal often precedes the formal departure conversation.*	___	___	___	___	___
Q4 **Has this agent become less responsive to internal communications in the last 30 days?** *Slower replies and shorter responses are early behavioural signals.*	___	___	___	___	___

Q5	**Do you know this agent has been approached by a competitor recruiter recently?** *If you know — act now. If you are unsure, assume yes for top producers.*	___	___	___	___	___
Q6	**Does this agent have passive income or financial ties beyond their split at this brokerage?** *Score 1 (yes/strong ties) or 3 (no/split only). Agents with no financial stake have nothing to lose by leaving.*	___	___	___	___	___
Q7	**Has this agent introduced a colleague to the brokerage in the last 12 months?** *Agents who recruit informally feel connected. Those who never have are more transactional in their relationship.*	___	___	___	___	___
Q8	**Is this agent in a peak switching risk window? (ages 35–42 OR first 3 years at brokerage)** *Both career stage and tenure influence switching probability significantly.*	___	___	___	___	___
TOTAL RISK SCORE *(add all scores above)*		___	___	___	___	___

SECTION 2

Interpreting the Score

What each score range means — and how urgently to act

SCORE 8–14 — Low Risk

This agent is stable. Their behaviour signals engagement and commitment. No immediate action required — but revisit this assessment in 90 days. Note: if Q6 scored 3 (no financial ties beyond split), consider a proactive revenue share conversation regardless of total score. A stable agent with no financial reason to stay is only stable until a competitor makes the right offer.

SCORE 15–20 — Monitor Closely

This agent is showing early-stage disengagement signals. They may not be actively looking — but they are open to being found. Have a proactive one-on-one conversation this month. Do not wait for a formal signal. Focus the conversation on their goals and future at the brokerage — not on retention for its own sake. If the brokerage does not yet have revenue share, a score in this range for a top producer is the trigger to start the process.

SCORE 21–30 | **High Risk — Act Now**

This agent is likely already evaluating options. A competitor recruiter may already be in the conversation. Schedule a one-on-one within the next 5 business days. Use the ROI Calculator to model what revenue share income would look like for this specific agent's production volume — and bring that number to the conversation. An agent who sees a real, specific number is more likely to stay for a conversation than an agent who hears a general promise.

SECTION 3

Immediate Action Plan

For any agent scoring 20+ — three steps, in order

1 Step 1 — Schedule a one-on-one within 5 business days

Do not wait for a formal resignation conversation. A proactive one-on-one framed around the agent's goals and growth — not around retention — is more effective than a reactive conversation after they have already made the decision. Ask: 'What would make the next 12 months at this brokerage the most productive of your career?' Their answer tells you what they need.

2 Step 2 — Model their revenue share income before the meeting

Use the ROI Calculator at rightally.io/roi-calculator. Input their current production volume and the agent count in their professional network. Bring a specific number to the conversation — not a general description of how revenue share works. An agent who sees that introducing three colleagues generates $X in annual passive income has a concrete reason to stay that is harder to dismiss than a promise.

3 Step 3 — Book a 20-minute call with RightAlly

If you do not yet have a revenue share programme, and one or more of your top five agents scored above 20, this is the moment to act. RightAlly helps independent broker-owners launch revenue share in 14 days. Book a call at rightally.io/book-a-call — we will design the programme structure for your specific brokerage, model the economics for your at-risk agent's production volume, and tell you whether it makes sense. No sales deck. No pressure. Just the conversation.

The question this assessment cannot answer: which agents who scored LOW today will score HIGH in 6 months. Run this assessment quarterly for your top five producers. The pattern of change over time is as important as any single score.

Build the financial reason for your agents to stay. Book a call: rightally.io/book-a-call ROI Calculator: rightally.io/roi-calculator Starter Checklist: rightally.io/revenue-share-checklist