How Exit-Ready Is Your Independent Brokerage?

16 questions across 5 dimensions — score your brokerage's succession readiness in 10 minutes and identify exactly where to focus next.

How to use: For each question, tick the option that best describes your brokerage today — not where you want it to be. Note the score at right. Total all 16 scores at the end and compare against the guide on page 2.

DIMENSION 1 — Revenue Share Infrastructure

Q1	Do you have a formal revenue share programme running inside your brokerage?	
[ ]	Not yet — no revenue share programme in place	Score: 1
[ ]	Informal — we share revenue but without a structured, documented programme	Score: 2
[ ]	Yes — a structured programme with defined tiers and documented participation rules	Score: 3

Q2	What percentage of your personal income comes from revenue share vs. your own production?	
[ ]	Less than 10% — almost all my income depends on my personal activity	Score: 1
[ ]	10–30% — revenue share is growing but my production still dominates	Score: 2
[ ]	More than 30% — revenue share is a meaningful and compounding income stream	Score: 3

Q3	How many agents actively participate in your revenue share programme?	
[ ]	Fewer than 5 — participation is minimal across the brokerage	Score: 1
[ ]	5–20 — a meaningful group participates but it is not yet brokerage-wide	Score: 2
[ ]	More than 20 — the majority of agents engage with the programme	Score: 3

DIMENSION 2 — Agent Retention Rate

Q4	What is your brokerage's 12-month agent retention rate?	
[ ]	Below 75% — we lose more than 1 in 4 agents annually	Score: 1
[ ]	75–85% — retention is adequate but not structurally strong	Score: 2
[ ]	Above 85% — we retain the vast majority of productive agents year over year	Score: 3

Q5	What percentage of your productive core (top 20% of producers) has been with you for 3+ years?	
[ ]	Fewer than 40% — our highest producers turn over regularly	Score: 1
[ ]	40–70% — some long-term stability but meaningful churn at the top	Score: 2
[ ]	More than 70% — our highest producers have long-term loyalty to the brokerage	Score: 3

Q6	**If you stepped back from daily operations today, what percentage of your agents would stay?**	
[ ] Fewer than 50% — most agent relationships are with me personally		**Score: 1**
[ ] 50–75% — a significant group would stay but many relationships are owner-dependent		**Score: 2**
[ ] More than 75% — agent loyalty is to the brokerage brand, not just to me		**Score: 3**

DIMENSION 3

Systems Transferability

Q7	**Do you have documented recruiting systems that function without your personal involvement?**	
[ ]	No — recruiting relies entirely on my personal relationships and judgment	**Score: 1**
[ ]	Partially — some documentation exists but execution depends on me	**Score: 2**
[ ]	Yes — a fully documented recruiting system a successor could operate independently	**Score: 3**

Q8	**Is your CRM populated with institutional knowledge that a successor could use?**	
[ ]	No — agent relationship knowledge is in my head, not captured in any system	**Score: 1**
[ ]	Partially — some CRM data exists but it is incomplete or inconsistently used	**Score: 2**
[ ]	Yes — comprehensive agent relationship, pipeline, and history data in a live CRM	**Score: 3**

Q9	**Could your brokerage operate at 80%+ capacity for 30 days without your daily presence?**	
[ ]	No — daily operations depend on my direct involvement and decisions	**Score: 1**
[ ]	Probably — with significant support from one or two key team members	**Score: 2**
[ ]	Yes — operational infrastructure and team capacity that functions independently	**Score: 3**

Q10	**Do you have automated onboarding workflows for new agents that run without your oversight?**	
[ ]	No — new agent onboarding is handled personally and varies each time	**Score: 1**
[ ]	Partial — some structure exists but requires manual steps and my oversight	**Score: 2**
[ ]	Yes — a complete, repeatable onboarding workflow that runs without my involvement	**Score: 3**

DIMENSION 4 — Owner-Dependence Risk

Q11 What percentage of your brokerage's total GCI comes from agents you personally recruited?

[ ]	More than 70% — most production traces directly to my recruiting relationships	**Score: 1**
[ ]	40–70% — significant owner-dependence but some organic agent network growth	**Score: 2**
[ ]	Less than 40% — agent base is broad and not primarily owner-recruited	**Score: 3**

Q12 Are your top three producers' relationships primarily with you or with the brokerage brand?

[ ]	Primarily with me — they would likely follow me if I left the brokerage	**Score: 1**
[ ]	Mixed — some brand loyalty but my personal relationship is the primary anchor	**Score: 2**
[ ]	Primarily with the brokerage — they would remain through an ownership transition	**Score: 3**

Q13 Do you have an identified, trained successor or designated broker ready to step in?

[ ]	No — no identified successor or designated broker with transition capability	**Score: 1**
[ ]	Partially — a person in mind but no formal plan or training in place	**Score: 2**
[ ]	Yes — an identified, trained successor with a documented transition plan	**Score: 3**

DIMENSION 5 — EBITDA and Valuation Position

Q14 How would you describe your brokerage's EBITDA trend over the last 24 months?

[ ]	Declining — margin has compressed materially in the last 12–24 months	**Score: 1**
[ ]	Flat — EBITDA is stable but has not grown meaningfully	**Score: 2**
[ ]	Growing — EBITDA has improved materially and is trending upward	**Score: 3**

Q15 Does your brokerage have geographic diversification across multiple offices or locations?

[ ]	Single office — all production concentrated in one location	**Score: 1**
[ ]	Two offices — some geographic diversification but still concentrated	**Score: 2**
[ ]	Three or more offices — meaningful diversification across markets	**Score: 3**

Q16 How would you rate your brokerage's technology infrastructure vs. market standard?

[ ]	Below market — manual processes, spreadsheets, or legacy systems	**Score: 1**
[ ]	At market — standard tools with limited integration or automation	**Score: 2**
[ ]	Above market — integrated CRM, automated workflows, modern infrastructure	**Score: 3**

SCORING GUIDE

Add up your scores from all 16 questions.

TOTAL: _______ / 48

SCORE	RESULT	WHAT IT MEANS	FOCUS NOW

40–48	**Succession Ready**	You have the infrastructure for a strong exit. Revenue share is building, retention is structural, and systems are largely transferable.	Compound what you have built. Run the income modelling tool annually and formalise your successor transition plan.
28–39	**Building Momentum**	Real progress with identifiable gaps. Your brokerage has succession infrastructure but specific dimensions need targeted investment.	Identify your two lowest-scoring dimensions. Revenue share expansion is typically the highest-ROI fix.
16–27	**Foundation Required**	Significant succession risk exists. Most brokerage value is currently tied to your personal presence and relationships.	Start with revenue share programme design and systems documentation immediately. The compounding window is open — but shortens every year.

Your next step: Model what revenue share passive income could look like for your brokerage in 3 and 5 years — based on your agent count, production levels, and succession timeline. Takes about 3 minutes.

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