

What to Do — and When — in the First Year Your Independent Brokerage Offers Revenue Share

A month-by-month execution checklist for independent broker-owners who have launched their revenue share programme and want the first year to produce the outcomes the research shows are possible.

Broker-owner:

Brokerage:

Programme launch date:

How to use this guide: Work through each stage in sequence. Tick each action as you complete it. The stages mirror the natural progression of a well-run revenue share programme — each one builds on the last. The goal is not just to launch the programme but to actively create the conditions that produce the outcomes.

STAGE 1

Week 1–2
FOCUS

- ☐ **Distribute the programme document to all agents**
One page, readable in 3 minutes. Include payout percentages, eligibility rules, and what happens if an introduced agent leaves. Clarity from Day 1 builds trust in the programme.
- ☐ **Present the programme in a brokerage meeting**
Explain the mechanics, run a worked example for the room, and answer every question. Agents who understand the programme from Day 1 start recruiting from Day 1.
- ☐ **Identify your 3–5 immediate advocate agents**
Look for experienced agents who already informally refer colleagues, who have strong professional networks, and who will see the programme's potential immediately. These are your first internal champions.

STAGE 2

Week 3–4
FOCUS

- ☐ **One-on-one conversations with each advocate agent**
Walk through their specific professional network. Model their potential earnings from one, two, or three introductions. Make the income concrete — agents act on specific numbers, not general possibilities.
- ☐ **Set up the referral tracking system**
Before introductions happen, have a clear system for recording who introduced whom and calculating payouts per transaction. A spreadsheet works for a single-tier programme. Establish the process before it is needed.
- ☐ **Give advocates a simple recruiting conversation guide**
Two or three sentences they can use when introducing a colleague to the programme. The easier it is to have the conversation, the more often they will have it.

STAGE 3	Month 2 FOCUS
[] Calculate and pay the first revenue share payouts Even if the amounts are small in Month 2, pay them on schedule. Consistency and reliability are more important than size at this stage. An agent who receives their first payout tells other agents about it.	
[] Communicate the first payouts to the full roster Not the individual amounts — the fact that the programme paid out. 'This month, agents in the programme received revenue share income.' Visibility is the activation mechanism for agents who haven't engaged yet.	
[] Track introduction activity Which agents have made introductions? How many conversations are happening? Who has joined as a result? Build this data from Month 2 forward so you have a real programme performance picture by Month 6.	
STAGE 4	Month 3 FOCUS
[] Review introduction activity — who has engaged and who hasn't Agents who have not yet made any introduction are not disengaged — they may simply need a different kind of conversation. Identify the non-engaged agents and find out why.	
[] Model the programme trajectory at current engagement levels If current introduction activity continues, what does Month 12 look like? If the trajectory needs adjustment, Month 3 is the right time — not Month 9.	
STAGE 5	FOCUS Month 4–6
[] Acknowledge the agents who are actively recruiting through the programme Name them. Celebrate them. Make it visible to the full roster that the programme is producing real results for real agents. Recognition is the cheapest and most effective advocacy tool available.	
[] Onboard all new agents with programme awareness on Day 1 Every agent who joins the brokerage during this period should understand the revenue share programme in their first week. Programme awareness from Day 1 accelerates their financial connection to the brokerage.	
[] Review the programme document for clarity What questions are agents asking most often? Update the programme document to answer them before they are asked. A clear programme is a trusted programme.	

STAGE 6	Month 6 FOCUS
[] Full programme review against your original projections Compare actual introductions, new agent joins, and payouts against the Year 1 model you built before launch. Where is the programme ahead of projection? Where does it need attention?	
[] Survey participating agents on what would make the programme more compelling Ask directly. Agents who are already participating have the most useful perspective on what would make them more active recruiters. Their answers shape Year 2 programme design.	
STAGE 7	Month 9 FOCUS
[] Assess retention stability in the first market Is the retention rate of agents in the programme meaningfully better than the retention rate of agents outside it? If yes, the retention foundation is working. If not, understand why before attempting to expand.	
[] Model a second market if the first is ready What would replicating the programme in a second location look like? Which agents would lead in that market? What is the minimum viable roster to launch the programme effectively? Month 9 is the right time to start this conversation — not Month 12.	
STAGE 8	Month 12 FOCUS
[] Communicate Year 1 results to the full roster Total introductions made. New agents who joined through the programme. Total revenue share income paid to agents in the programme. These numbers, communicated clearly, activate the agents who have not yet engaged. Real results from real colleagues are the most compelling recruiting tool the programme generates.	
[] Recognise the agents who drove the most programme activity Name them publicly. A Year 1 recognition moment creates the Year 2 motivation for every agent watching.	
[] Set Year 2 goals and communicate them to the roster Programme enhancements. Expansion targets. New advocate recruitment. A clear Year 2 vision, shared with agents, signals that the programme is permanent and growing — not a trial that may disappear.	
Model your Year 1 projections: rightally.io/roi-calculator Launch checklist: rightally.io/revenue-share-checklist Book a call: rightally.io/book-a-call	