

Growth Phases



Large Metropolitan Markets

	Solo Producer / Small Team	Strong Core Team	Small Company	Lead Conversion Machine	Hyper Growth and Evolution	Building Infrastructure for Scale	Established Brokerage
Current Situation	I have more business than I can handle. I need help. I have some good agents but no organization or support.	I have a team of hungry agents and want to generate more leads to help them be successful and keep them producing.	The business is rocking but feels unstable. I need my agents to be more accountable because we have plenty of leads to go around.	I'm spread too thin recruiting, training, onboarding, and managing agents so my own production is suffering.	My top agents want better splits and their own teams. I need to figure out how to entice them to stay.	We have a hybrid model for teams and independent agents and have no problem attracting new agents. The staff is maxed out.	We are operationally set up for growth, so I can now focus on recruiting top agents, strategic partnerships, and ancillary services.
Transactions	25-50	50-75	60-100	80-150	100-250	250-750	750+
Agent Count	2-4	3-6	6-10	8-15	10-30	30-60	60-150
Staff Count	1	2	3	4-6	5-10	10-15	15-25
Next Key Hire	Rockstar Admin	Marketing Specialist	Inside Sales Associate	Sales Manager	Director of Operations	Elevate or Recruit Dept Heads	Company President
Net Profit Percent	65-75%	45-60%	35-45%	35-45%	25-40%	10-20%	10-15%
Net Take Home	\$200k-600k	\$400k-800k	\$750k-1.2M	\$1-2M	\$1.5-2.5M	\$2.5-5.0M	\$3.5-5.0M+
Opportunities	Creating a roadmap	Mastering Lead Generation	Building an Inside Sales Dept	Leveraging a Sales Management	Creating a Model for Growth	Forming an Executive Team	Finding ancillary revenue streams
Goals	<ul style="list-style-type: none"> Implement business plan Put systems in place Hire rockstar admin who can build out and manage systems Create core value prop and team comp plan 	<ul style="list-style-type: none"> Identify 4 core marketing pillars Focus on numbers and track everything Identify top and low performers 	<ul style="list-style-type: none"> Optimize lead conversion by hiring a strong ISA and tracking lead/client conversion Revise and improve scripts and presentations 	<ul style="list-style-type: none"> Hire experienced sales manager to handle recruiting, onboarding, training, and accountability Create and enforce team standards of performance 	<ul style="list-style-type: none"> Determine value prop that attracts both experienced and new agents while maintaining profitability Identify key profile and recruiting strategy to target them 	<ul style="list-style-type: none"> Audit all processes/workflows Create capacity plans for headcount modeling Have a pro management team in place 	<ul style="list-style-type: none"> Capacity planning and economic modeling Identify target expansion markets and recruit anchor partners/teams Focus on strategic partnerships and ancillary services

Mission

Vision

Values

Client Value Proposition

Target Audience



Your Business Today

Evaluate Your Current Production

Write down your ...

- Last calendar year volume
- Last 12 months volume (LTM)
- Average sales price
- % Transactions from listings

Calculate ...

- Total LTM in your primary/secondary markets
- Your ranking as compared to other agents in your primary/secondary markets



Your Business Today

Evaluate Your Current Business Structure

Write down your ...

- # of agents
- # of support staff
- # of transactions per year

Calculate ...

- % Net profit
- Net take-home pay





Sales & Marketing Today

Sales Processes and Initiatives

Sales Training



Lead Flow



Performance Management/Accountability



Sales Positions



Marketing Processes and Initiatives

Marketing Support



Lead Generation



Brand Awareness



Sphere Marketing



Property Marketing





Finance & Operations Today

Summary of Financial Structure Today

Structure & Planning

-

Tracking

-

Additional Expenses

-

Summary of the Operational Structure of Today

Management Goals

-

Office Space

-

Support Staff

-



Operations Today

Summary of the Operational Structure of Today

Management Goals

-

Office Space

-

Support Staff

-

Long-Term Goals





SWOT Analysis

The SWOT analysis identifies areas in the business that are thriving or could use additional awareness and improvement.

Strengths

Weaknesses

Opportunities

Threats



Sales & Marketing Goals

Goal 1

Goal 2



Finance & Operations Goals

Goal 1

Goal 2