

The Brokerage, mapped

Every part of the business on one page. The three lifecycles break down on page two.

THE LIFECYCLES *the three journeys a brokerage runs, expanded on page two*

01

Agent Lifecycle

- Attract & recruit
- Onboard
- Train & develop
- Produce & coach
- Retain

02

Staff Lifecycle

- Select & hire
- Onboard
- Train & ramp
- Perform & manage
- Retain & grow

03

Client Lifecycle

- Capture & qualify
- Nurture & convert
- Serve & represent
- Close & deliver
- Retain & refer

THE ENGINES *the machines that power production every day*

04

Marketing & Brand

- Brand identity & consistency
- Social media
- Website & IDX
- Content & listing promotion
- Email & newsletters
- Lead generation & funnels

05

Sales & Transactions

- Buyer process
- Listing & seller process
- Offers & negotiation
- Transaction coordination
- Compliance & paperwork
- Closing & follow-up

06

Technology & Systems

- CRM
- Tech stack & tools
- System of record
- Reporting & dashboards
- Communication platform
- Integrations

07

Operations & Admin

- SOPs & documentation
- Project & initiative tracking
- Agent directory & records
- Office & facilities
- Vendors & partners
- Supplies, signs, logistics

THE FOUNDATION *what holds the whole business up*

08

Leadership & Strategy

- Vision, mission, values
- Ownership & org structure
- Goals & planning
- Decision-making & governance

09

Culture & Communication

- Company culture, lived
- Internal communication
- Meeting cadence & rhythm
- Team collaboration

10

Finance & Economics

- Commission structure & splits
- Agent economics & profitability
- Fees & billing
- Ancillary revenue (TC, mortgage, title)

11

Compliance & Risk

- Licensing & regulatory
- Fair housing & ethics
- Contracts & legal
- E&O, insurance & data security

The three journeys

How agents, staff, and clients move through the business, from first contact to lasting relationship.

01 · The Agent Journey ATTRACT TO LASTING PRODUCER

01 Attract & Recruit - A clear reason to join, beyond the split - Getting in front of the right agents - A pipeline, not one-off conversations - Selecting for fit, not filling seats	02 Onboard - A real welcome, not just paperwork - Tools and accounts set up day one - Compliance handled for them - Clear on their role and first 90 days	03 Train & Develop - The fundamentals for new agents - Deeper training for producers - A steady coaching rhythm - Tracked, so you see who's growing	04 Produce & Coach - Real goals and a business plan - Their numbers against those goals - Held accountable in 1:1s - Wins recognized, competition that drives	05 Retain - Agents who feel supported, not alone - Recognized for their wins - Always something next to grow into - A reason to stay, not to shop around
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02 · The Staff Journey SELECT TO LASTING CONTRIBUTOR

01 Select & Hire - What the role actually needs to do - Interviews that go beyond the resume - Hiring for character and culture, not just skill - The right person in the right seat	02 Onboard - A leader-led welcome, not a desk and a login - Immersed in how you do things - Systems, access, and role made clear - Clear on the first 90 days	03 Train & Ramp - Real mastery of their process - Cross-trained, so nothing has one point of failure - Culture reinforced in daily huddles - Signed off when they're truly ready	04 Perform & Manage - Clear goals and regular 1:1s - Real check-ins at day 21, 180, and 365 - Reviews that actually happen - Recognized for the standard they hold	05 Retain & Grow - Leaders developed on purpose - A career path and pay that grows - People who feel they belong - Celebrated at every milestone
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03 · The Client Journey LEAD TO REPEAT & REFERRAL

01 Capture & Qualify - Knowing where your leads come from - Answered fast, before they cool off - Every lead captured, none slipping through - Qualified, so time goes to the real ones	02 Nurture & Convert - Followed up with, consistently - A real consult on what they need - The agreement signed - Kept warm until they're ready	03 Serve & Represent - An experience worth talking about - Kept in the loop the whole way - Shown the right homes, or the right buyers - Truly represented, start to finish	04 Close & Deliver - A closing that feels like a win - A gift they actually remember - Every document clean and handled - Checked on after the keys change hands	05 Retain & Refer - Kept in a database, not forgotten - Reviews and a reputation that compound - Repeat business and referrals - Events and value that keep you top of mind
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