AUTOJATE · OPERATIONS AUDIT

Real Estate Brokerage · Texas

Prepared for **The Broker-Owner**
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THE BOTTOM LINE

> You're leaking about **$78,000** a year. Three fixes get roughly **$51,000** of it back.

THE MATH, PLAIN

YOU'RE LOSING		INVEST ONCE		YOU GET BACK
$78,000 every year	→	**$14,000** to fix all three	→	**$51,000** every year

Spend $14,000 once, recover **$51,000 a year** – that's **+$37,000 net** in year one, and it pays for itself in about **3 months**.

SITUATION

PRODUCTION	TEAM	12-MONTH GOAL	STACK & AI MATURITY
30 closed YTD · ~70/yr pace	9 agents (½ PT) · lender	Back to 70-75 deals/yr	Franchise CRM · low

RECOMMENDED PATH

	QUICK WIN	BIG SWING	FOUNDATION
COSTING YOU NOW	**~$65,000/yr**	*new growth*	**~$13,000/yr**
THE FIX	Every lead auto-answered, qualified, and self-scheduling. Your top 30 teed up daily, scheduling off your plate.	Paid-ad lead engine: renter-to-first-time-buyer ad engine, run online at scale. Plus foreclosure and probate.	Your own concierge: nurture, lender follow-up, and human handoff on their CRM. VA plus AI.
TIMELINE	~2 to 4 wks	~2 to 3 wks	~3 to 4 wks, then ongoing
INVESTMENT	$4,000	$6,000	$4,000
ANNUAL VALUE	$24,000	$15,000	$12,000
YEAR-1 ROI	6×	2.5×	3×

WHERE *NOT* TO USE AI

- × **More lead spend**: you are at $500 to $1,000 a month and the follow-up already can't keep up. The fix is working what comes in, not buying more.
- × **The agents not chasing leads**: a comp and ownership question, not a tool. Set the accountability, or let AI plus a VA plus you qualify everything and route only pre-approved, ready buyers to agents on the split.

IN THEIR WORDS

> *"A hundred leads — they just don't call. They call once, no answer, or they don't call at all."*

> *"I'd rather do it, I know my close rate's better... but I don't have the time."*

> *"They fall off or find another agent. I could save those."*

WHAT WE INVESTIGATED

Interviews held	1 (owner)
Workflows audited	7
Stack reviewed	4 tools
Engagement	1 call, fast-track

THE NEXT 30 DAYS: 3 DECISIONS

1. Greenlight the quick win and give access to your CRM and portal lead flow.
2. Set the routing rule: AI and a VA qualify everything, only pre-approved ready buyers go to agents on the split. You keep the best.
3. Approve the renter-to-buyer ad play as the first Big Swing, plus the ad-account setup.

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This is the map. The build is yours to choose.