Transaction Intelligence Maturity Assessment

Benchmark Your Brokerage Against Industry Leaders

TRANSACTION OVERSIGHT

1. Who is responsible for contract oversight in your brokerage?

☐ Agent only

☐ Transaction Coordinator only

☐ Broker only

☐ TC + Broker share

☐ Everyone + AI verification

2. How long does it take to effectively review ALL documents in a typical transaction?

☐ 5+ hours

☐ 3-5 hours

☐ 2-3 hours

☐ 1-2 hours

☐ Under 30 minutes with AI

3. Are agents expected to read every line of HOAs, title reports, inspection reports? If yes, what percentage actually do it?

☐ Not expected to

☐ Expected but <25% do

☐ Expected but 25-50% do

☐ Expected but 50-75% do

☐ Expected and >75% do

☐ AI reads everything, agents review summaries

OPERATIONAL SYSTEMS

4. Do you have a system to track all transaction deadlines?

☐ No system - agent responsibility

☐ Manual calendars/spreadsheets

☐ Basic transaction software

☐ Automated deadline tracking

☐ AI-extracted with smart alerts

5. How many transaction deadlines were missed last quarter?

☐ Not tracked

☐ 10+

- ☐ 6-10
- ☐ 3-5
- ☐ 1-2
- ☐ None

6. Have you ever lost a deal or made brokerage concessions at closing due to issues identified too late?

- ☐ Never happens
- ☐ Rarely (1-2 times per year)
- ☐ Occasionally (3-5 times per year)
- ☐ Regularly (6-10 times per year)
- ☐ Frequently (10+ times per year)
- ☐ Too often to count

KNOWLEDGE MANAGEMENT

7. How often do you conduct mandatory agent training on forms/contracts?

- ☐ Never - agents learn on their own
- ☐ Annually
- ☐ Quarterly
- ☐ Monthly
- ☐ Weekly/Ongoing

- [ ] AI provides real-time guidance instead

8. When agents have questions about company procedures or standards, they:

- [ ] Figure it out themselves
- [ ] Ask whoever's available
- [ ] Check scattered emails/documents
- [ ] Access a central knowledge base
- [ ] Get instant AI-powered answers

9. When contract or state law questions arise, your agents:

- [ ] Google it
- [ ] Call the broker (interrupting their day)
- [ ] Consult external legal hotline ($$$)
- [ ] Search internal resources
- [ ] AI instantly provides cited answers

CLIENT EXPERIENCE & TRANSPARENCY

10. Do you provide clients with a comprehensive breakdown of their deadlines and responsibilities?

- [ ] No formal system
- [ ] Agent explains verbally

- [ ] Email key dates as needed
- [ ] Standard timeline template
- [ ] Digital portal with all dates
- [ ] AI-powered dashboard with alerts

11. What percentage of your clients actually read and understand all transaction documents?

- [ ] Under 10%
- [ ] 10-25%
- [ ] 25-50%
- [ ] 50-75%
- [ ] Over 75%
- [ ] We ensure understanding with AI summaries

12. How much liability does your brokerage assume for ensuring clients fully understand all documents?

- [ ] Complete liability - it's on us
- [ ] Significant liability
- [ ] Moderate - shared with agent
- [ ] Minimal - client signs they've read
- [ ] Protected - we document everything
- [ ] Protected with AI-verified comprehension

RISK & LIABILITY

13. Estimated revenue lost to missed deadlines/failed deals last year?

☐ Not calculated

☐ Over $500K

☐ $200K-$500K

☐ $100K-$200K

☐ $50K-$100K

☐ Under $50K

14. Number of E&O claims in last 3 years?

☐ 5+

☐ 3-4

☐ 1-2

☐ 0

☐ 0 with proactive monitoring

BONUS: GROWTH ACCELERATION

15. If you could receive 100% verified seller leads (only pay at contract), would you be interested?

☐ Absolutely - sign us up

- [ ] Yes, depending on pricing
- [ ] Maybe, need more details
- [ ] Probably not
- [ ] No, we have enough leads
- [ ] No, we can't handle more volume

16. Do you have a system to ensure agents follow up with leads in a timely manner?

- [ ] No system - trust agents to handle
- [ ] Manual tracking by managers
- [ ] Basic CRM reminders
- [ ] Automated follow-up sequences
- [ ] AI-powered lead nurturing
- [ ] Full automation with accountability

Scoring Categories

Your personalized report will benchmark your brokerage across five key dimensions:

1. **Transaction Oversight Excellence** (Questions 1-3)
   - Industry Leader Score: 90-100

   - Average Brokerage: 40-60

2. **Operational Systems Maturity** (Questions 4-6)

- Industry Leader Score: 90-100

- Average Brokerage: 30-50

3. **Knowledge Management & Training** (Questions 7-9)

  - Industry Leader Score: 85-100

  - Average Brokerage: 25-45

4. **Client Experience & Transparency** (Questions 10-12)

  - Industry Leader Score: 85-100

  - Average Brokerage: 20-40

5. **Risk Management & Protection** (Questions 13-14)

  - Industry Leader Score: 90-100

  - Average Brokerage: 35-55

BONUS: Growth Readiness Score (Questions 15-16)

- High-Growth Brokerages: 85-100

- Average Brokerage: 30-50

What You'll Receive

After completing this assessment, you'll get:

✓ **Your Transaction Intelligence Maturity Score** (0-100)

✓ **Percentile Ranking** compared to brokerages your size

✓ **Category Breakdown** showing your strongest and weakest areas

✓ **Industry Benchmarks** for top-performing brokerages

✓ **Personalized Recommendations** based on your specific gaps

✓ **ROI Calculator** showing potential impact of improvements

✓ **Competitive Intelligence** for your specific market

This assessment takes approximately 3-5 minutes to complete. Your responses are confidential and will be used to generate your personalized Transaction Intelligence Report.