OUTPUT 3 — DISCOVERY CALL QUESTIONS

These 15 questions are designed to extract missing or contradictory data and lock in the final Roadmap inputs.

Lead Flow & Routing

1. Who currently assigns new leads, and how is that decision made?
2. Are there any existing rules for assignment (price, geography, agent availability), or is it ad hoc?
3. What percentage of incoming Zillow leads go untouched during busy weeks?

Agent Behavior & CRM Use

4. What is the real reason agents avoid using the CRM consistently?
5. Are there any response-time standards today? If so, how are they enforced?
6. How do you currently measure or track agent follow-up and activity levels?

Ops & Systems

7. Who owns data quality across spreadsheets, CRM, MLS, and transaction files?
8. Which operations workflows—if automated immediately—would save Michael the most time?
9. Should MLS → CRM syncing be instant, hourly, or daily for your workflow to feel stable?

Delivery / Contract-to-Close

10. Which contract-to-close tasks must remain human only, and which are safe to automate right now?
11. What specific event triggers should notify the TC automatically (e.g., offer accepted, inspection scheduled, appraisal ordered)?

Capacity & Volume

12. At what exact volume do deals start slipping or falling apart?
13. Can the TC role be expanded with part-time support, or must it remain a single full-time role?

Owner Constraints

14. Which decisions or responsibilities do you want completely off your plate by Q2?

AI Boundaries

15. Are there any client-facing interactions you do *not* want automated under any circumstances?