

OUTPUT 1 — COMPANY DIAGNOSTIC MAP

1. Lead Flow

Sources: Zillow (paid), referrals (40% of business), open houses, Instagram/Facebook ads.

Issues:

- Follow-up inconsistency; Zillow leads go cold if not hit within 2 hrs.
- No automated routing; agents overloaded.
- No tracking of open house → revenue.
- Referrals sometimes lost during peak season.

Systemic Patterns:

- Multiple sources → no unified tracking.
 - Follow-up depends on human memory.
 - Leads slip through cracks consistently.
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2. Sales & Conversion

Tools: Zillow CRM + spreadsheets + Gmail + Google Calendar.

Issues:

- Follow-up cadence exists but not enforced.
- No automated sequences.
- No pre-qualification system.
- Agents max out during busy season.
- No tracking of deal failures, response time, or feature preferences.

Patterns:

- CRM not adopted widely.
 - Data quality prevents forecasting.
 - Text + spreadsheets = no audit trail.
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3. Operations & Systems

Stack: Google Workspace, Sheets, Zillow CRM, MLS, DocuSign, QuickBooks.

Issues:

- Duplicate data entry.
- MLS → CRM manual.
- DocuSign not integrated.
- QuickBooks isolated; commissions manual.
- Weekly reporting takes hours.

Patterns:

- Ops director overwhelmed.
 - No integration layer.
 - No workflow standardization.
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4. Delivery / Transaction Coordination

Team: 5 agents, 1 TC, 1 admin.

Issues:

- TC notified 2–3 days late.
- Inspection scheduling manual.
- Document collection slow.
- No PM platform.

Client Experience Gaps:

- Confusion on next steps.
- Delays from late title issues.
- Complaints on communication during contract.

Structural Limit:

- Volume doubling would break TC.
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5. Owner-Level Bottlenecks

Owner handles:

- Approvals
- Escalations
- Lead prioritization
- Agent coaching
- Tech decisions

Effects:

- Owner is growth bottleneck.
 - Business cannot scale.
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6. Volume Failure Points

- Response time collapses.
- Handoffs fail.
- Escalations increase.
- TC overloaded.
- Agents stop using CRM.