

FUTURE READINESS ASSESSMENT

Strong foundations. Too much running through one phone.

A temperature check of where Realtor of Excellence stands on AI, systems and ways of working, based on what you shared on Monday. It's a starting point, not a verdict.

Company: ROE head office systems

Team: Xavier's sales & rentals team

Individual: Xavier

Department (rentals): to confirm

SNAPSHOT

You're ahead of most of the market. ROE already runs Follow Up Boss and Dotloop, head office uses AI to work through calls across a 40,000-person database, and AI reply suggestions are starting to arrive in Slack. The team is hungry for this, and leadership wants results, not talk.

The gap is in the day-to-day. A lot of the real work lives in WhatsApp, inboxes and Xavier's head, not in the systems. Each agent follows up and markets in their own way. Decisions about the team lean on experience and gut, because the numbers you see are head-office numbers, not your team's.

STRENGTHS TO BUILD ON

- **Service-first culture.** "A listing is not a listing. It's called a listening."
- **A real platform:** CRM, digital signing, a large database and fortnightly Power Monday activity tracking.
- **Video and Matterport that win remote buyers.** Overseas clients can get a real feel for a home before they fly in.
- **Proven people,** including a rookie of the year, and 25 years of Xavier's market judgement.
- **Appetite to move.** "But we need to get a result."

READINESS SCORECARD

42 / 80 8 areas scored, 0-10 each.
Rental admin to confirm.

AI use today		5
Lead response speed		4
Follow-up		6
CRM & systems		5
Listing & marketing content		3
Rental admin	TO CONFIRM	
Data & decisions		3
Team AI confidence		7
Leadership appetite		9

In the room you rated yourselves 66/90. Scores here weigh that against the examples you gave. The tools are in place, but how they're used varies. You rated rental admin highly (it runs through Rams); we'll walk through it before we score it.

GAP 01

Everything runs through Xavier

Several email accounts, endless WhatsApp groups and mandates kept in memory. The team waits for time with you.

Cost of inaction: "The amount of deals I've lost this year, I don't want to tell you."

Opportunity: inbox and WhatsApp triage with you approving replies, plus a "What would Xavier say" brain the team can ask.

GAP 02

Content is slow and inconsistent

One listing video took six hours to edit. AI-written posts get blocked in Facebook groups. Every agent markets in their own style.

Cost of inaction: "We are actually acting as individuals rather than a team." Hours lost each week, and a weaker brand.

Opportunity: your voice and video in, AI polish out, under one ROE brand playbook.

GAP 03

No team-level numbers

Power Monday shows activity. Nobody can yet see the team's conversion, sales cycle or best lead sources.

Cost of inaction: "It's not specific to our team itself." Being busy gets rewarded, closing doesn't, and decisions stay on gut feel.

Opportunity: a simple team scorecard (lead to meeting, offer to close, cycle time, source), plus a plan for winning stock.

RECOMMENDED FIRST MOVES

1 Inbox Zero for Xavier
Clear and triage your email accounts and WhatsApp, with drafted replies you approve. This frees your time and shortens response times straight away.

2 Record, then build the brain
Record calls, meetings and viewings, with the client's consent. That captures every mandate and follow-up and seeds a shared brain the team can ask instead of interrupting you.

3 One content workflow
A hackathon to set the ROE voice and look, then turn on-site video and voice notes into posts, captions and explainer videos in minutes rather than hours. Keep it real and truthful, with no misleading photo edits.

4 A team scorecard and stock plan
Track your own funnel each week for Power Monday. Then test the ideas that came up for winning stock: life-event triggers and a seven-day check-in after every sale.

WAYS TO WORK TOGETHER

OPTION 1 · INTENSIVE

R10,000

for two half-day sessions

- Two focused, hands-on half days with you and the team
- Built around the first moves above

OPTION 2 · ONGOING

R15,000 per month

includes a weekly call and one hackathon

- A weekly call to keep momentum and solve what comes up
- One hackathon: a hands-on session that ends with something working

BONUS · EITHER OPTION

A 1:1 session for you, Xavier, to get to inbox zero. It's the first thing we do in the process, so you feel the difference from day one.

Next step: choose the option that suits you and we'll book the Inbox Zero session first. After that we'll confirm the rental admin picture and set your baseline numbers, so we can measure progress from here.