

# WEBINAR

## RESIDE OPERATIONAL TRAINING

### WHY YOUR TEAM FEELS LIKE IT'S ALWAYS ONE BAD WEEK AWAY FROM FALLING APART

(And the Ops System That Fixes It)  
The exact playbook behind 100+ real estate teams doing  
200, 300, 400+ transactions a year.

APRIL 11<sup>TH</sup>,  
2026

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# WHO I AM

**Lauren Holland**  
REAL ESTATE OPS LEADER SINCE 2018

100+ OPERATORS LED

200+ VAs LED

SCALED OPS FOR OVER 80 LOCATIONS

AT ONE POINT SUPPORTING ABOUT 750 AGENTS

OUR EXPANSION TEAM DID ABOUT 4600

CLOSINGS IN ONE YEAR

SUPPORTING 600+ AGENTS IN RESIDE

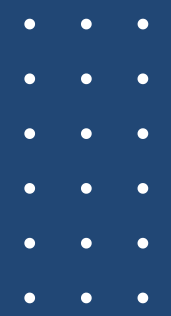
ECOSYSTEM



## Fair Warning — and What You're Walking Away With

"This isn't motivational. There's no 'believe in yourself' energy in this room. I'm here to show you what's actually broken and exactly how to fix it."  
— Lauren Rathgeb-Holland

- **Why teams cap out**— the real reason, not the story you're telling yourself
- **The 5 ops mistakes**— quietly killing teams before 200 transactions
- **The full ops playbook**— scorecard, cadence, accountability structure
- **Implementation roadmap**— what to do in the next 30 days



# If Any of This Sounds Familiar — You're Not Alone

## "I'M PUTTING OUT FIRES INSTEAD OF LEADING"

Every time you try to step back, something breaks. Because the system isn't there. YOU are the system.

## "MY AGENTS SHOULD BE PRODUCING MORE"

You know they're capable. But there's nothing in your business that actually holds them to it. So they coast.

## "I'VE TRIED ACCOUNTABILITY — IT COLLAPSES IN 30 DAYS"

New scorecard. New meeting rhythm. Works for two weeks. Then everyone quietly stops. Every. Time.

## HERE'S THE TRUTH:

It's not a people problem. It's not a market problem. It's not a mindset problem. It is a **systems problem**... and systems can be fixed.

*"Teams without real ops cap out between 100-150 transactions. Not because their agents aren't good. Because the system can't hold the weight."*



# WHO THIS IS FOR

## THE BUILDER

- Starting your team
- Wearing every hat
- Looking for your first leverage hire

## THE "AT-CAPACITY" OPERATOR

- In every deal
- Putting out fires daily
- No time to lead or grow

## THE EMPIRE EXPANDER

- Growing but inconsistent
- Hitting a ceiling
- Systems starting to break

## THE \$100M RESET

- High production, low clarity
- Systems feel messy
- Need to simplify to scale



# THE 5 OPS MISTAKES LAUREN SEES IN ALMOST EVERY TEAM SHE WORKS WITH

**These aren't unusual edge cases. They're the default. See how many you recognize.**



## MISTAKE 1

### YOU ARE THE SYSTEM

- Everything runs through your brain, not a documented process
- When you step away for a week, things slip or stop entirely
- You've become a bottleneck disguised as a leader
- New hires can't onboard because the process lives in your head

### FIX #1

- Document the high-leverage 20% first— lead intake, follow-up cadence, offer-to-close
- Every process needs an owner who isn't you
- Test: Can your ops run for 2 weeks without you answering a single question?

## MISTAKE 2

### Accountability = More Meetings

- Team meetings become rally sessions — energy in the room, no data
- Agents learn to perform in the meeting, not produce outside it
- You end every call feeling like things are great — then nothing changes
- More check-ins just add pressure on you, not them

### FIX #2

- Accountability is structural, not conversational
- The scorecard shows the number. You just have the conversation it triggers.
- Replace 2 of your weekly meetings with one data review



# Mistakes #3, 4, and 5: The Growth Killers

## MISTAKE #3

### HIRING BEFORE YOU'RE READY

Adding bodies to a broken system doesn't scale it... it amplifies the chaos. Most teams hire another agent when they need an ops person first.

#### FIX

Your first hire should be ops, not agent. Every agent you add before ops is in place makes the chaos worse.

## MISTAKE 4

### NO CLEAR AGENT JOURNEY

Agents don't know what "good" looks like. No onboarding milestones. No 30/60/90 day expectations. They coast... because the system lets them.

#### FIX

Every agent needs to know: Producer or passenger by day 90. The roadmap makes this objective, not personal.

## MISTAKE #5

### THE SYSTEM BREAKS AT 15

What works at 5 agents collapses at 15. What works at 15 falls apart at 30. You need a different system at each stage... and most teams never make that shift.

#### FIX

Build for the next stage, not the current one. Always be one stage ahead of where you are.

# GROWTH STAGES

STAGE 1

## FOUNDER-LED

### 1-5 Agents

Everything runs through you. That's okay — for now. Document everything so you can hand it off.

STAGE 2

## SYSTEMS-LED

### 5-15 Agents

Most teams STALL here. Process must run without you. This is where most teams in this room are today.

STAGE 3

## LEADER-LED

### 15+ Agents

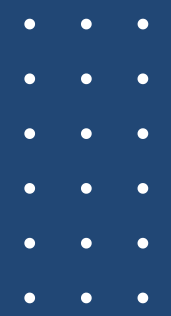
You work ON the business. Ops lead runs the rhythm. Agents self-manage against the scorecard.



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# THE OPS OPERATING SYSTEM THAT FIXES ALL FIVE

**3 layers. Real tools. No theory. This is what Lauren runs inside RESIDE.**



# Three Pillars of Team Ops That Actually Scales

## PEOPLE

Who is on your team, what do they own, and what happens when they don't deliver.

- Clear role definitions
- RACI for every function
- Off-ramp criteria defined upfront

## PROCESS

What gets done, how it gets done, and when — without it all running through you.

- Documented SOPs for the top 20%
- Weekly rhythm that's non-negotiable
- Tech stack that doesn't add friction

## PERFORMANCE

What gets measured, what conversations happen at each color, and what the consequences are.

- 5 numbers per agent, every week
- Public visibility — clarity, not punishment
- Defined path from yellow → red → out

***Most team leaders have one of these three. High performers have all three working together as a single system. That's the gap.***

## MONDAY

### Numbers Review

- › Pull the scorecard — no exceptions
- › Green/Yellow/Red by agent
- › Flag conversations needed
- › Set the week's intention publicly

## TUESDAY–WEDNESDAY

### 1:1 Coaching

- › 20 min per agent — scorecard only
- › Yellow agents: what's blocking you?
- › Red agents: the script (see next slide)
- › Green agents: protect their momentum

## THURSDAY

### Operations Review

- › Ops lead runs this — NOT you
- › Pipeline health, closings this week
- › Blockers and escalations
- › 30-min max, no exceptions

## FRIDAY

### Wrap + Recommit

- › Each agent posts their week's #s
- › Public visible in Slack/CRM
- › 3 commitments for next week
- › Team lead reviews, not responds

## What TO schedule

- The Monday numbers pull (30 min)
- Your 1:1s Tue–Wed (blocked in cal)
- Ops review Thu (ops lead runs it)

## What NOT to schedule

- Open-door "strategy" conversations with no agenda
- Group accountability meetings with no data
- Any meeting that could be an async Slack update

# DO'S & DON'TS



## WHAT TO SCHEDULE

- The Monday numbers pull (30 min)
- Your 1:1s Tue-Wed (blocked in cal)
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## WHAT NOT TO SCHEDULE

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AGENT	CONVERSATIONS	APPTS SET	APPTS HELD	CONTRACTS WRITTEN	PIPELINE VALUE	STATUS
Sarah M.	42 / 40	8 / 6	6 / 5	2 / 2	\$1.4M	GREEN
Marcus T.	28 / 40	4 / 6	3 / 5	1 / 2	\$740K	YELLOW
Priya K.	18 / 40	2 / 6	1 / 5	0 / 2	\$210K	RED
David L.	41 / 40	7 / 6	5 / 5	3 / 2	\$2.1M	GREEN
Jen R.	22 / 40	3 / 6	2 / 5	0 / 2	\$0	RED — WEEK 2

### Green → Protect

Don't over-manage green agents. Acknowledge publicly.  
Ask: "What do you need to stay here?"

### Yellow → Coach

1:1 this week. "What got in the way?" Identify the blocker.  
Co-create the plan. Set a 7-day checkpoint.

### Red (Week 2) → Decide

This is a formal conversation. Two weeks red = a system decision, not a coaching conversation. Use the script.

# The Conversation Most Team Leaders Get Wrong

## THE ACCOUNTABILITY FRAMEWORK

### WEEK 1 YELLOW — COACHING CONVERSATION

*"Hey Marcus, scorecard shows you at 70% of goal this week. Walk me through your week — what happened? ... What do you need from me to hit the number next week? I want to set a checkpoint Thursday."*

### WEEK 1 RED — STRUCTURED CONVERSATION

*"Priya, you're at 45% of goal. That's two key metrics we need to talk about. I'm not here to pile on — I want to understand if something's wrong in the system or if this is a focus issue. Which is it? ... Okay, here's what I need from you this week and here's what I'll do on my end."*

### WEEK 2 RED — FORMAL DECISION CONVERSATION

*"Jen, this is the second week in a row we're having this conversation and the numbers haven't moved. I want to be direct with you: we've got a 30-day window to turn this around. Here's exactly what that looks like. If the numbers don't change, this isn't going to work — and I'd rather tell you that now than let this drag on for both of us."*

### What NOT to say

- "I just feel like you're not really trying" — subjective, not useful
- "We've talked about this before" — shame, not direction
- "I need more out of you" — vague, no action
- Anything in a group setting before a private conversation

### The mindset shift

You stop being the bad guy because **the system is**. You're just reading what the scorecard says and having the conversation it triggers. That's not management — that's leadership.

# Who Owns What — And What You Should NEVER Touch Anymore

## THE PEOPLE LAYER

FUNCTION	TEAM LEADER	OPS LEAD	AGENTS
Weekly scorecard review	A	R	I
1:1 coaching conversations	R	C	I
Lead assignment and routing	I	R	C
Transaction coordination	I	R	A
New agent onboarding	C	R	I
Answering "where is this file?"	NEVER	R	I
Following up on missed tasks	NEVER	R	A
Vision, culture, growth strategy	R	I	I

R Responsible — does the work  
 A Accountable — owns the outcome  
 C Consulted — gives input  
 I Informed — kept in the loop  
 **NEVER** — if you're doing this, you have a systems problem

Responsible — does the work  
 Accountable — owns the outcome  
 Consulted — gives input  
 Informed — kept in the loop

# The 90-Day Agent Roadmap — Producer or Passenger by Day 90

THE PEOPLE LAYER

## DAYS 1–14

### Systems & Setup

- › CRM setup + training complete
- › Branded profiles live
- › Shadow 3 listing / buyer appts
- › Learn the weekly scorecard
- › First 1:1 with team leader

## DAY 30

### First Reps

- › Hitting 80% of weekly scorecard
- › At least 1 active client
- › SOPs understood + followed
- › Lead follow-up cadence live
- › Decision: on-track or flag

## DAY 60

### Volume Check

- › Hitting 100% of scorecard targets
- › 1+ contract written or pending
- › Operating independently
- › Referral and sphere contacts begun
- › Decision: producer track or exit talk

## DAY 90

### The Decision

- › Full producer: stays, gets resources
- › Below threshold: formal PIP or exit
- › Documented: no surprises for anyone
- › "Passenger" conversation is objective
- › Team is protected from drag

## Why this works

Every expectation is set on Day 1. No one can say "I didn't know." The roadmap makes the 90-day conversation objective — it's not you being hard on them. It's the system working.

## What "passenger" costs you

One underperforming agent costs your team 15–20% in lost culture and distracted leadership attention. One bad fit who you kept for 8 months costs \$40K+ in split revenue and lost capacity.

### THE 3 TOOLS YOU ACTUALLY NEED

#### 1 CRM (Follow Up Boss / LionDesk / kvCORE)

Every lead. Every follow-up. Every agent interaction. One source of truth. If it's not in the CRM, it didn't happen.

#### 2 Transaction Management (Dotloop / Skyslope / Brokermint)

Every deal. Every document. Every deadline. The ops lead owns this — not you, not the agent.

#### 3 Scorecard Dashboard (Google Sheets / Monday.com / CRM reports)

The weekly scorecard every agent fills. Visible to everyone. Non-negotiable. Updated every Friday.

### What to SKIP

- A separate "accountability app" nobody checks
- A project management tool with 40 boards and no owner
- Any tool that requires more than 2 clicks to log activity
- Tools your agents have to be trained more than once on
- "AI tools" layered on top of a broken process

*The best tech stack is the one your team actually uses. A \$15/month Google Sheet that gets filled every Friday beats a \$300/month platform that's 40% adopted.*

# What Great Ops Actually Looks Like — Before and After

WHAT YOU'RE BUILDING TOWARD

## RIGHT NOW — MOST TEAMS

### Team leader is the bottleneck

Every decision, every fire, every "where is this?" runs through you. You can't take a real week off without things slipping.

### Accountability = nagging

You're chasing agents. Following up on follow-ups. Feeling like a babysitter, not a CEO.

### Growth = more chaos

Every new agent makes it harder. More people, same broken system, just louder.

## WITH THE SYSTEM IN PLACE

### Team leader works ON the business

Vision. Partnerships. Growth strategy. You're a CEO, not a coordinator. Ops lead runs the rhythm.

### Agents self-manage against the scorecard

They know what green looks like. They know what red triggers. No chasing. The system holds them.

### Growth is contained, not chaotic

New agents slot into the system. The process doesn't break. The ops lead handles onboarding.

200+

Transactions where this system stops breaking

90

Days to have the system fully installed

30%

Avg increase in agent production when  
scorecard goes live

0

More times you should be asked "who do I  
send this to?"

← Prev

15 / 20

Next →



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# YOUR NEXT 30 DAYS - YOUR IMPLEMENTATION ROAD MAP

**No consultant required. No new app. Just the system, installed in order.**

# The Exact Sequence — Install It In This Order

YOUR NEXT 30 DAYS

## WEEK 1

### Build the Scorecard

- › Pick your 5 core metrics
- › Set targets per agent (or team target)
- › Build it in Google Sheets or your CRM
- › Share it — make it visible
- › Run your first Monday pull

## WEEK 2

### Install the Cadence

- › Block Monday numbers review
- › Schedule 1:1s Tue–Wed (20 min each)
- › Set Friday wrap ritual in Slack
- › Announce the rhythm to the team
- › Expect resistance — that's normal

## WEEK 3

### First Real 1:1s

- › Run 1:1s using the scorecard only
- › No small talk — straight to the numbers
- › Use the green/yellow/red conversation scripts
- › Document what each agent commits to
- › First test of the accountability framework

## WEEK 4

### Review + Adjust

- › Are agents filling the scorecard? If not, why?
- › Are targets calibrated right?
- › Who's on track? Who needs a red conversation?
- › What process needs to be documented next?
- › What's your first RACI to build?

## What to expect

- **Days 1–14:** Resistance. Some agents won't like being held to numbers.
- **Days 15–30:** Clarity. You'll know exactly who's producing and who isn't.
- **Days 30–60:** Either the team levels up — or the wrong people self-select out. Both are wins.

## The one thing to do Monday

Open a Google Sheet. Create 6 columns: Agent, Conversations, Appointments Set, Appointments Held, Contracts Written, Status.

Fill in your agents' names. Add targets. Send it to the team. That's it. You're running the system.

# What Broken Ops Is Actually Costing You Right Now

THE COST OF DOING NOTHING

## Lost Production Per Underperforming Agent

One agent running at 50% capacity on a team doing \$15M volume = \$750K in untapped production you're funding with your overhead. Every month you don't act.

## Your Time at Full Opportunity Cost

If you spend 15 hours/week on ops tasks you shouldn't touch, at \$300/hr in opportunity cost, that's \$240K/year in leader-level time spent on coordinator tasks.

## Turnover From Good Agents Who Leave

High performers don't stay in chaotic environments. When your best producer leaves because the ops are broken, you're not just losing their GCI — you're losing everything they would have produced for the next 3–5 years.

## The Ceiling You Can't Break Through

Without a real ops system, 150–200 transactions is your ceiling. Not because of the market. Not because of your agents. Because the system physically cannot hold more volume at that load.

The question isn't "can I afford to fix my ops?" The question is: **"How much longer can I afford not to?"**

## STEP 1

### Something breaks

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An agent, a deal, a process.  
Something goes sideways.

## STEP 2

### You fix the symptom

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A conversation, a new rule, a new tool.  
Works for a week — maybe two.

## STEP 3

### It comes back

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Same fire. Different day. Because you  
fixed the symptom — not the system  
underneath it.

→ This is not a **discipline** issue. This is a **design** issue. You're not stuck because you're not working hard enough. You're stuck because you keep fixing symptoms instead of the system underneath them.

## Everything flows through you

Your business is capped at your personal bandwidth — not your team's potential. The moment you step away, it slows down.

## Every decision depends on you

Your team is dependent, not empowered. They can feel it too — and high performers don't stay in that environment.

## Every problem comes to you

Capable people bring problems that a process should handle. That's a system problem — not a people problem.

## THE TRUTH

**A business where everything runs through the owner is not a business.**

**It's a job with overhead.**

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And that version of the business does not scale. **It just gets heavier.**

## THE REAL PROBLEM

You don't have an operations system.

# You have **Operator Dependency.**

### OPERATOR DEPENDENCY LOOKS LIKE:

- The business works because **you're** good — not because the system works
- Things break when you're not watching
- Growth is capped at your personal capacity
- You can't take a real week off

### A REAL SYSTEM LOOKS LIKE:

- The business works because the **process** works — not because you're in it
- Things run when you're not watching
- Growth is limited by opportunity — not you
- You can take a real week off and nothing breaks

Operator dependency **feels like control** — until it becomes a ceiling. The business works because of you, not because of a system. And that will cap you every time.

# WHAT BREAKS AT SCALE - IN THIS EXACT ORDER

## WHY THE CEILING EXISTS

### BREAKS FIRST

## People

### Hiring for relief instead of ownership

You add bodies, not operators — someone to do tasks, not own outcomes. No clear role definitions, so everything still escalates to you. Misaligned expectations baked in from day one.

### BREAKS SECOND

## Process

### It lives in your head — not documented, not repeatable

Every time something needs to happen, someone has to ask you. That's not a process — that's dependency with extra steps. New hires can't ramp because the SOP is your brain.

### BREAKS THIRD

## Performance

### No visibility, no consistency, no consequences

No one knows what good looks like, so everyone sets their own bar. The business slows down without anyone saying it. Underperformers stay because the off-ramp was never defined.

**This is predictable.** And that means it's fixable. Fix in reverse: performance clarity first → documented process → ownership hiring.

## OPTION 1

### Build it yourself

Take everything from today and implement it. The scorecard, the cadence, the scripts. It will help. You have everything you need.

This still beats where you are now. Most people don't do even this.

RECOMMENDED

## OPTION 2

### Install it the right way

We build it *with* you — your scorecard, your cadence, your accountability structure — inside your specific business. Not a template. The real thing, running.

→ [resideplatform.com/call](https://resideplatform.com/call)

**100+**

TEAMS BUILT WITH THIS

**600+**

AGENTS IN THE ECOSYSTEM

**90**

DAYS TO INSTALL IT



Schedule **your FREE** call, to **discover the 3 bottlenecks in your business.**



# FREE BUSINESS AUDIT



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THANK YOU!

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