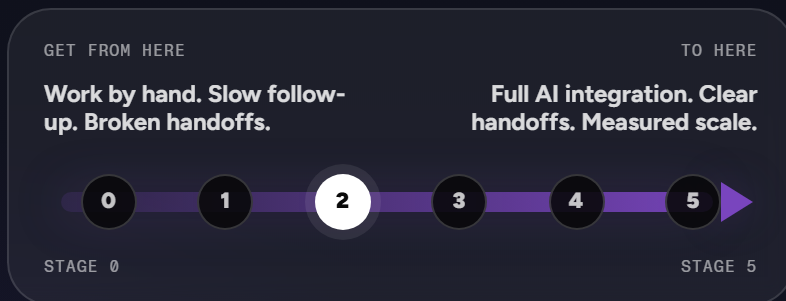


THE WORKFLOW AUTOPILOT ROADMAP

WHAT STAGE IS YOUR BUSINESS IN?

Go from scattered brokerage ops to Workflow AI.

Find it. Fix it. Move up.



THIS IS NOT A TECH SCORE

It is a work score.

Find the stage you are in. Fix that stage first. Then move up with less drag and less guesswork.

0 BY HAND
DOING IT BY HAND

1 TOO SLOW
WORK IS TOO SLOW

2 LEADS
LEADS GO COLD

3 TOOLS
TOOLS DON'T TALK

4 TEAM
TEAM CAN'T KEEP UP

5 SCALE
READY TO SCALE

Find your stage. Fix it first. Move up with less drag.

FIND YOUR STAGE

Start at 0. Read down.

Stop at the first one that feels true.

0

DOING IT BY HAND

Too much lead and admin work by hand



1

WORK IS TOO SLOW

The work gets done, but lead response and admin follow-through are too slow



2

LEADS GO COLD

Leads come in, but follow-up is slow or uneven



3

TOOLS DON'T TALK

The team lives in FUB, kvCORE, HubSpot, Google Workspace, and spreadsheets



4

TEAM CAN'T KEEP UP

Good people are buried in routing, follow-up cleanup, and admin chase



5

READY TO SCALE

The basics work. Now more leads and more agents expose the weak spots



THE FAST VERSION

The whole roadmap on one page.

See all 6 brokerage stages fast. Then go to your page.

| STAGE | WHAT IT FEELS LIKE | MAIN PROBLEM | GRADUATE BY |
|---|---|--|--|
| <p>STAGE 0</p> <p>DOING IT BY HAND</p> | Too much lead and admin work by hand | You are the routing layer | Make one repeat brokerage task start on its own |
| <p>STAGE 1</p> <p>WORK IS TOO SLOW</p> | The work gets done, but lead response and admin follow-through are too slow | Lead and admin work sits between steps | Cut the waits that slow lead response and admin flow |
| <p>STAGE 2</p> <p>LEADS GO COLD</p> | Leads come in, but follow-up is slow or uneven | Slow speed-to-lead | Reply, route, and work every lead fast |
| <p>STAGE 3</p> <p>TOOLS DON'T TALK</p> | The team lives in FUB, kvCORE, HubSpot, Google Workspace, and spreadsheets | Double entry and broken brokerage handoffs | Build one clean flow between your core brokerage tools |
| <p>STAGE 4</p> <p>TEAM CAN'T KEEP UP</p> | Good people are buried in routing, follow-up cleanup, and admin chase | Low-value admin work eats up the team | Free the team from repeat brokerage work |
| <p>STAGE 5</p> <p>READY TO SCALE</p> | The basics work. Now more leads and more agents expose the weak spots | Growth breaks systems nobody measures | Monitor what works and scale it |

HOW TO USE THIS GUIDE

Find it. Fix it. Move up.

This guide is here to show the next fix.

1 STEP 1

Find your stage.

Pick the first one that feels true.

2 STEP 2

Fix that stage.

Do not skip ahead.

3 STEP 3

Then move up.

Make the next fix only after this one works.

START HERE, NOT HERE

| | | |
|------------------------------|---|----------------------------------|
| DO NOT DO THIS | → | DO THIS |
| Buy more tools first. | | Fix the stuck step first. |

| | | |
|-----------------------------|---|---|
| DO NOT DO THIS | → | DO THIS |
| Map every edge case. | | Fix the thing that repeats most. |

| | | |
|---------------------------------|---|---------------------------------|
| DO NOT DO THIS | → | DO THIS |
| Try to fix all 6 stages. | | Fix one stage at a time. |

LOOK FOR THIS FIRST

- Lead sits
- Admin chase
- Round robin breaks
- Duplicate notes

THE ORDER

Find the stuck step → **Fix the handoff** → **Then add tools**

THE POINT

Start with the bottleneck. Not the tool.

STAGE 0

DOING IT BY HAND

Work moves when you touch it. New leads, admin tasks, and follow-up start in memory, text threads, or a half-used CRM.

ROLE

Owner/broker

TEAM SIZE

2-6 people

MOST WEEKS FEEL LIKE

Too much lead and admin work by hand

MAIN PROBLEM

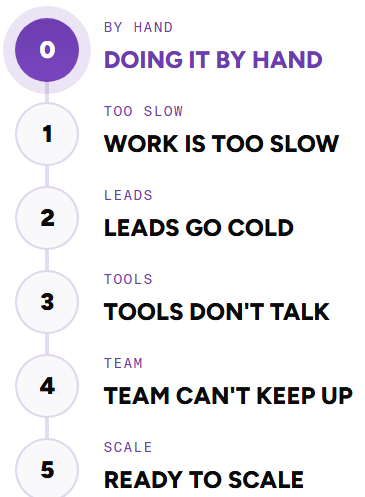
You are the routing layer

GRADUATE BY

Make one repeat brokerage task start on its own

FIX THIS STAGE FIRST

Then move up.



LESS DRAG BEATS MORE TOOLS

WHAT THIS LOOKS LIKE

- New leads sit in Follow Up Boss, kvCORE, or inboxes.
- Agents and admins keep separate notes.
- Round robin and handoffs happen by Slack, text, or memory.

FIX FIRST

- List the repeat tasks around lead intake, routing, and admin handoff.
- Pick the one that starts the same way each time.
- Make the first handoff happen without a manual ping.

GRADUATE WHEN

- A repeat task starts on its own.
- Leads get touched even when the broker is busy.
- Admin work no longer waits on memory.

AI LEVEL 0

No Workflow AI yet

Start small. Let AI help with one repeat brokerage task. Do not ask it to fix chaos.

STAGE 1

WORK IS TOO SLOW

The work gets done. It just moves too slow. Lead routing, approvals, and admin follow-up drag out every day.

ROLE

Ops lead

TEAM SIZE

3-10 people

MOST WEEKS FEEL LIKE

The work gets done, but lead response and admin follow-through are too slow

MAIN PROBLEM

Lead and admin work sits between steps

GRADUATE BY

Cut the waits that slow lead response and admin flow

FIX THIS STAGE FIRST

Then move up.

0

BY HAND

DOING IT BY HAND

1

TOO SLOW

WORK IS TOO SLOW

2

LEADS

LEADS GO COLD

3

TOOLS

TOOLS DON'T TALK

4

TEAM

TEAM CAN'T KEEP UP

5

SCALE

READY TO SCALE

LESS DRAG BEATS MORE TOOLS

WHAT THIS LOOKS LIKE

- People ask for status all day.
- A lead is ready to move but waits on one click or one person.
- Admins and agents lose time chasing the same update.

FIX FIRST

- Time each handoff from lead to contact to admin follow-up.
- Find where work sits untouched.
- Add reminders and SLA timers before a lead goes stale.

GRADUATE WHEN

- Lead and admin work moves faster each week.
- The team knows where work is without asking.
- Fewer tasks stall halfway through.

AI LEVEL 1

Workflow AI helps with updates

AI can draft updates and summaries here. But speed still comes from better routing and handoffs.

STAGE 2

LEADS GO COLD

Leads come in, but follow-up is slow or uneven. Good leads cool off while the team is busy.

ROLE

Lead manager

TEAM SIZE

3-15 people

MOST WEEKS FEEL LIKE

Leads come in, but follow-up is slow or uneven

MAIN PROBLEM

Slow speed-to-lead

GRADUATE BY

Reply, route, and work every lead fast

FIX THIS STAGE FIRST

Then move up.

- 0 BY HAND **DOING IT BY HAND**
- 1 TOO SLOW **WORK IS TOO SLOW**
- 2 LEADS **LEADS GO COLD**
- 3 TOOLS **TOOLS DON'T TALK**
- 4 TEAM **TEAM CAN'T KEEP UP**
- 5 SCALE **READY TO SCALE**

LESS DRAG BEATS MORE TOOLS

WHAT THIS LOOKS LIKE

- New leads sit in FUB, Lofty, kvCORE, HubSpot, inboxes, or DMs.
- Different agents follow up in different ways.
- Good leads go quiet before anyone moves.

FIX FIRST

- Connect every lead source to one place.
- Send a fast first reply.
- Assign a clear owner and next step.

GRADUATE WHEN

- Every lead gets a fast first touch.
- No lead sits with no owner.
- Managers can see response speed.

AI LEVEL 2

Workflow AI helps with speed-to-lead

This is where AI can help most: speed-to-lead, routing, and keeping the next step obvious.

STAGE 3

TOOLS DON'T TALK

You have the tools. The problem is the gaps between them. The same info gets typed again because the stack never became one core system.

ROLE

Systems lead

TEAM SIZE

5-20 people

MOST WEEKS FEEL LIKE

The team lives in FUB, kvCORE, HubSpot, Google Workspace, and spreadsheets

MAIN PROBLEM

Double entry and broken brokerage handoffs

GRADUATE BY

Build one clean flow between your core brokerage tools

FIX THIS STAGE FIRST

Then move up.

0

BY HAND

DOING IT BY HAND

1

TOO SLOW

WORK IS TOO SLOW

2

LEADS

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SCALE

READY TO SCALE

LESS DRAG BEATS MORE TOOLS

WHAT THIS LOOKS LIKE

- Different tools show different answers.
- The team builds backup spreadsheets.
- Lead routing, admin updates, or reporting break when one field gets missed.

FIX FIRST

- Map where data starts, moves, and gets stuck.
- Choose one source of truth.
- Kill double entry first.

GRADUATE WHEN

- Status stays in sync.
- The team trusts what the system says.
- Less work gets lost between apps.

AT LEVEL 3

Workflow AI works inside brokerage handoffs

AI gets stronger here because your CRM, admin tools, and team comms finally share the same facts.

STAGE 4

TEAM CAN'T KEEP UP

The team works hard. But too much time goes to admin, follow-up cleanup, and internal chasing. Busy weeks make it worse.

ROLE

Broker/ops manager

TEAM SIZE

8-30 people

MOST WEEKS FEEL LIKE

Good people are buried in routing, follow-up cleanup, and admin chase

MAIN PROBLEM

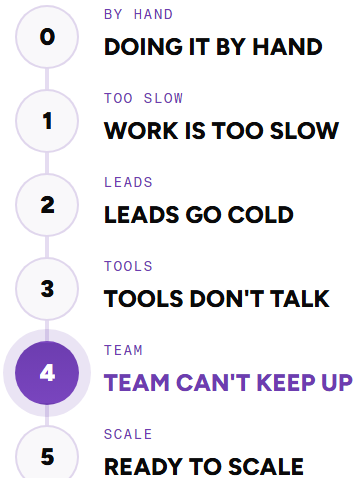
Low-value admin work eats up the team

GRADUATE BY

Free the team from repeat brokerage work

FIX THIS STAGE FIRST

Then move up.



LESS DRAG BEATS MORE TOOLS

WHAT THIS LOOKS LIKE

- Admins and ISAs spend hours on copy-and-paste work.
- Agents wait on back-office cleanup.
- Growth creates even more drag.

FIX FIRST

- Pull repeat work off high-value roles.
- Standardize intake, routing, and updates.
- Make a simple path for exceptions and escalations.

GRADUATE WHEN

- The team spends less time chasing details.
- Work keeps moving during busy weeks.
- Agents stop feeling the chaos.

AI LEVEL 4

Workflow AI takes repeat ops work off the team

Use AI to take repeat ops work off the team, not to replace judgment or relationship work.

STAGE 5

READY TO SCALE

The basics work. Now you need visibility, alerts, and room to grow. This is where scaling shows every hidden break.

ROLE

Operator

TEAM SIZE

15-50+ people

MOST WEEKS FEEL LIKE

The basics work. Now more leads and more agents expose the weak spots

MAIN PROBLEM

Growth breaks systems nobody measures

GRADUATE BY

Monitor what works and scale it

FIX THIS STAGE FIRST

Then move up.

BY HAND

0

DOING IT BY HAND

TOO SLOW

1

WORK IS TOO SLOW

LEADS

2

LEADS GO COLD

TOOLS

3

TOOLS DON'T TALK

TEAM

4

TEAM CAN'T KEEP UP

SCALE

5

READY TO SCALE

LESS DRAG BEATS MORE TOOLS

WHAT THIS LOOKS LIKE

- Automations run but nobody owns them.
- Errors hide until conversion drops or agents complain.
- Growth outpaces the way work is documented.

FIX FIRST

- Add alerts when key brokerage flows break.
- Track speed-to-lead, response speed, and conversion.
- Expand from proven wins, not random automations.

GRADUATE WHEN

- The system is measured.
- New workflows roll out from a plan.
- You can add agents and leads without guessing.

AI LEVEL 5

Workflow AI helps watch and scale brokerage ops

Now AI should help monitor the system, flag lead leakage, and scale what already works.

WHAT GOOD LOOKS LIKE

This is what fixed brokerage ops looks like.

Leads get touched. Admin work moves. Agents trust the system.

1

Leads get touched fast.

Speed-to-lead is not left to memory or luck.

2

Admins know the next step.

ISA, admin, and agent handoffs are clear.

3

The team trusts it.

Follow Up Boss, kvCORE, HubSpot, and Google Workspace stay in sync.

WORK SHOULD MOVE LIKE THIS

1

Lead comes in

2

Right agent gets it

3

Follow-up starts

4

Next step is tracked

IF YOU STILL SEE THIS, IT IS NOT FIXED

Lead sits

Round robin breaks

Admin chase

ISA lag

Duplicate notes

WHERE AI FITS

AI comes after the workflow.

First make the work clear. Then let AI help.

1

CLEAN THIS FIRST

AI works when these are clear.

Clear lead source

Clear owner

Clear SLA

2. USE AI FOR THIS

Good AI jobs

- Draft first replies
- Route inbound leads
- Reactivate stale leads
- Sum up agent calls

NOT THIS

Do not use AI for this

- Replace the agent
- Guess lead intent
- Fix a broken CRM
- Hide missed follow-up

3

ADD AI HERE

Use it at the stage you are in.

STAGE 0-1

Not yet.

If leads still wait or admins still chase updates, fix that first.

STAGE 2-3

Now it helps.

This is where it can speed speed-to-lead, lead routing, and nurture.

STAGE 4-5

Now it can scale.

Now it can take repeat admin work off the team and flag lead leakage.

THE RULE

Fix the workflow first. Then add AI.

FREE BROKERAGE WORKFLOW AI AUDIT

Want help fixing this?

Short call. Clear plan.



BOOK HERE

workflowautopilot.com/contact

info@workflowautopilot.com

WHO IT IS FOR

For brokerages with 10+ agents or steady inbound lead volume and ops that feel slow, stuck, or broken.

WHAT YOU GET

A free Workflow AI audit for brokerages. We show you what to fix first.

NOT THERE YET?

Not there yet? Start with the free content at workflowautopilot.com/learn.

NEXT STEPS

1. Go to workflowautopilot.com/contact.
2. Pick a time on the calendar.
3. We talk through lead routing, admin handoffs, follow-up gaps, and team drag.
4. We show you what to fix first.
5. You leave with a clear first move, even if we are not the right fit.

If this feels like you, I look forward to talking to you.

Tyler

This guide is for education. Results depend on your business, effort, skill, team, and execution.