UNSHAKEN RESOLVE

THE REAL ESTATE TEAM LEADERSHIP GUIDE

GROW YOUR TEAM WITHOUT BECOMING THE BOTTLENECK

Build the people, standards, and systems that help your team perform beyond your personal production.

A practical field guide for real estate agents stepping into team leadership—and established team leaders preparing for their next stage of growth.

RECRUIT WITH PURPOSE / DEVELOP OWNERSHIP

A practical guide and implementation workbook with a 90-day plan.

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START HERE

Put the guide into practice

Use the leadership chapters first, then complete the implementation worksheets before recruiting.

Sequence	Owner / time to reserve	Output
1. Clarify the team Pages 3 and 12–13	Team leader + team; 45 minutes	Team promise and ideal candidate profile.
2. Diagnose the need Pages 4, 15–16	Leader + operations; review one week of work	Capacity decision and role selection.
3. Define and evaluate Pages 5, 14, 17–18	Hiring leader; 45 minutes to prepare	Role scorecard and consistent interview evidence.
4. Prepare onboarding Pages 6, 19–20	Mentor + leader; reserve training time	First-week checklist and readiness reviews.
5. Lead and review Pages 7–11	Leader; recurring weekly time	Standards, delegated decisions, scorecard, and 90-day actions.

Use the worksheets as decision tools

Complete one set for each role. Write an accountable owner and review date on every commitment. The suggested planning times are starting estimates; the work review and onboarding take place over time.

Lead the Unshaken Resolve way

Identity before authority: serve without needing control or credit. Stay calm under pressure. Communicate clearly. Build ownership through small, consistent actions. Use these principles throughout hiring, coaching, and accountability.

Working session date / participants / first deliverable:

01 / LEAD BEFORE YOU ADD

Define the team you are building

Growth starts with a clear purpose and a client experience your team can deliver consistently.

Move from producer to leader

Your production matters. Your leadership also determines whether other people can succeed. Protect time to coach, set standards, and remove recurring obstacles. If every question, client issue, and decision returns to you, adding agents can multiply the interruptions.

Write a clear team promise

Define who you serve, the experience you promise, and the behaviors that make that promise real. Example: “We help relocation clients stay informed through a clear plan, proactive updates, and dependable handoffs.” Make the promise specific enough to teach and observe.

Give the team a reason to join and stay

Explain the support you actually provide: coaching, operational help, tools, lead opportunities where available, and a path to greater responsibility. Be equally clear about what each agent owns. Avoid promising lead volume or results you cannot reliably deliver.

Our ideal client and the experience we promise:

The leadership work I will protect time for each week:

02 / CHECK READINESS

Solve the right capacity problem

Before recruiting, identify whether the constraint is people, skill, process, or leadership attention.

Readiness question	Evidence to bring to the decision
Is there work for another agent?	Review lead flow, appointments, current agent capacity, and the sources of opportunity.
Is the problem actually administrative?	Track your interruptions for a week. Separate client work, coordination, and leadership decisions.
Can we train someone well?	Name a mentor, reserve coaching time, and prepare a written onboarding plan.
Can we support the commitment?	Review the added costs, support capacity, and ramp-up assumptions with the people responsible for your business finances.
Are our standards repeatable?	Confirm that CRM use, client updates, handoffs, and escalation steps are documented and practiced.

Make a deliberate decision

Choose one: recruit now, fix a process first, develop current agents, or add operational support. If an essential readiness item is missing, assign an owner and a completion date before expanding.

Our biggest constraint and the evidence behind it:

Our next capacity decision / owner / review date:

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03 / RECRUIT FOR CONTRIBUTION

Hire for fit, then build skill

Use the same role criteria and structured questions for every candidate.

Create a role scorecard before the interview

Write the role purpose, expected outcomes, support provided, and observable standards. For an agent, include preparation, follow-up, CRM accuracy, client communication, and coachability. Confirm role scope and team arrangements with your brokerage.

Ask for evidence	Listen for
“Tell me about a commitment you missed. What happened next?”	Ownership, clear communication, and a specific corrective action.
“Describe feedback that changed the way you worked.”	Openness to coaching and evidence of changed behavior.
“Walk me through how you would organize follow-up after an open house.”	A clear process, thoughtful prioritization, and documented next steps.
“What support helps you perform—and what will you own?”	Realistic expectations and a shared understanding of responsibility.

Use a consistent evaluation

Rate each criterion as: no evidence yet, partial evidence, or clear evidence. Record examples rather than impressions. Use a fictional client scenario to assess communication and follow-up planning. Resolve gaps before making a commitment.

Our three essential selection criteria:

04 / ONBOARD DELIBERATELY

Build a 30 / 60 / 90-day runway

Use demonstrated readiness to increase responsibility. Time served alone does not establish competence.

Period	Leader provides	Agent demonstrates
Days 1–30 Learn & practice	System access, team standards, a mentor, role-play, and opportunities to observe client work.	Accurate sample CRM records, a weekly schedule, practiced client updates, and clear escalation judgment.
Days 31–60 Execute with support	Regular coaching, appropriate supervised opportunities, and review of follow-up and handoffs.	Consistent next steps, prepared appointments, timely updates, and reliable completion of commitments.
Days 61–90 Own & improve	A readiness review, feedback on live work, and clear boundaries for greater independence.	Repeatable performance, sound judgment within role scope, and an improvement plan for remaining gaps.

Define what “ready” means

Use observed practice, actual work samples, and feedback. When an agent needs more support, specify the skill, practice activity, reviewer, and next review date. Keep brokerage supervision and required approvals in place.

New agent / mentor / start date:

First readiness demonstration and review date:

05 / MAKE CULTURE OBSERVABLE

Set standards people can follow

Culture becomes visible in how the team communicates, serves clients, and handles missed commitments.

Area	Suggested team agreement
Client communication	Agree on the update cadence and preferred channel at the start. Record the next update and who owns it.
CRM discipline	Record meaningful conversations, the next action, its owner, and the due date by the end of the working day.
Handoffs	Transfer the client context, promises made, upcoming dates, open issues, and next action. The receiver confirms ownership.
Coverage	Publish a coverage plan for time away. Make the backup contact and escalation path easy to find.
Mistakes & concerns	Raise concerns early. State what happened, who is affected, and the recommended next step.

Address a missed commitment directly

“We agreed on [standard]. I observed [specific behavior]. The impact was [effect]. What got in the way? What will you do next, by when, and what support do you need?” Pause before responding. Address the behavior calmly, preserve the person’s dignity, and own any lack of clarity in your instructions. Document the agreement and follow up. Apply standards consistently.

One standard we need to clarify / owner / date:

06 / DELEGATE DECISIONS

Build ownership beyond yourself

Delegate an outcome with boundaries, resources, and a review point—not just a list of tasks.

Use a five-part delegation brief

Outcome: What should be true when the work is complete?
Owner: Who is accountable for completing it?
Authority: What may they decide, and what requires approval?
Support: Which resources and people are available?
Review: When will you check progress and evaluate the result?

Decision level	Example within approved team processes
Recommend; leader approves	An agent proposes a change to the team's client-update process.
Decide within boundaries; inform	A designated owner arranges routine coverage using the agreed coverage plan.
Own and report at review	An operations lead maintains the onboarding checklist and reports unresolved access issues.

Develop your next leader

Look for people who follow through, help others improve, and raise concerns constructively. Give one small leadership assignment, observe results, and coach. Production alone does not establish readiness to lead people. Look for influence without rank: someone who helps others succeed without needing authority or credit.

One decision I will transfer / new owner / boundaries:

The outcome and review date we will agree on:

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07 / COACH WITH EVIDENCE

Run a useful weekly scorecard

Start with a few measures that connect activity, client experience, and results. Use your own baseline.

Measure	Definition / source	Target	Actual
Meaningful conversations	Two-way discussions that identify a need or next step; CRM.	____	____
Appointments held	Completed client consultations; calendar and CRM.	____	____
New client agreements	Newly executed agreements recorded through your brokerage process.	____	____
Closings	Completed transactions; closing records.	____	____
Follow-up completion	Due follow-ups completed on time ÷ all follow-ups due.	____	____
Client-update completion	Agreed updates delivered on time ÷ all updates due.	____	____

Read the pattern before prescribing the fix

If conversations rise but appointments do not, review qualification and the invitation to meet. If appointments rise but agreements do not, coach preparation and consultation skills. If service commitments slip, inspect workload and handoffs before adding more leads.

Set targets collaboratively

Use recent performance, available opportunities, role expectations, and capacity. Match the reporting period and definitions. Treat a zero denominator as N/A. Compare conversion over an appropriate time window because conversations and closings often occur in different weeks.

Our priority measure / baseline / target / review date:

08 / BUILD THE LEADERSHIP RHYTHM

Make coaching part of the calendar

Meetings should produce decisions, support, and clear commitments.

Cadence	Focus and output
Weekly team huddle 25 minutes	5 min: wins and client lessons. 5 min: scorecard patterns. 10 min: one bottleneck and a decision. 5 min: owners, deadlines, and next check-ins.
Weekly individual coaching 20 minutes	Review the previous commitment, diagnose one challenge, practice one skill, and agree on one next action.
Monthly growth review 45 minutes	Review agent progress, client experience, support capacity, recruiting readiness, and team-leader workload. Decide what to stop, improve, or expand.

Ask before you rescue

“What outcome are you trying to achieve?” “What have you tried?” “What do you recommend?” “What support do you need?” Then agree on a next step. Step in when the issue exceeds the agent’s authority or needs immediate escalation.

Retain people through meaningful development

Ask each agent what they want to become better at, where support is missing, and what would make the team more valuable to them. Recognize specific behaviors. Offer increased responsibility when readiness is demonstrated.

Our recurring coaching time and the person who protects it:

09 / PUT GROWTH INTO MOTION

Your next 90 days

Choose a manageable sequence. Review progress weekly and adjust the plan to the evidence.

Phase	Priority and evidence of progress
Days 1–30 Clarify	Name the capacity constraint. Set three team standards. Establish a baseline scorecard. Protect coaching time.
Days 31–60 Build	Pilot the onboarding checklist. Transfer one recurring decision. Coach one priority skill. Recruit only when readiness supports it.
Days 61–90 Strengthen	Review client service and agent progress. Confirm decision ownership. Decide whether to add capacity, improve support, or pause expansion.

Our single most important 90-day outcome:

First action / accountable owner / due date:

Success evidence and our review date:

Bring Resolve Leadership to your team

Michael Payne helps leaders build clarity, trust, and accountability through keynotes, workshops, consulting, and coaching. Use this guide as the starting point for a conversation about your team’s next stage of growth.

Explore resources and connect: www.unshakenresolve.com

IMPLEMENTATION WORKSHEET

Define your team avatar

Owner: team leader with current members. Complete before recruiting. Output: a shared team promise.

Example: relocation buyers who need organized communication and dependable local support.

Clients and market we serve

Example: agreed updates, documented next steps, and confirmed handoffs.

Our service promise and three observable standards

Define meetings, communication channels, coverage, and coaching participation.

Our working rhythm and expectations

Separate actual resources from future plans. Clarify lead generation ownership.

Support we reliably provide—and what agents own

Name concrete coaching, operational support, and development opportunities.

Why the right person would join and stay

IMPLEMENTATION WORKSHEET

Define the person you need

Owner: hiring leader. Use job-relevant evidence. Output: an ideal candidate profile tied to the work.

Separate essential capabilities from skills you have capacity to teach.

Skills needed on day one

Example: communicates honestly, owns mistakes, stays respectful under pressure, and helps others succeed.

Work habits that demonstrate our leadership principles

Ask what they want to learn, which support they need, and what they will own.

Motivation and expectations to explore

Examples: a follow-up work sample, a role-play, and a specific feedback story.

Evidence we will request

Define these before interviews. Fit means demonstrated behavior, not personal similarity.

Trainable gaps / unacceptable work behaviors

IMPLEMENTATION WORKSHEET

Build the role scorecard

Owner: hiring leader. Complete before advertising. Output: one clearly defined position.

State why the position exists, not just the job title.

Role title / manager / problem this role solves

For each: define the result, evidence, and review date.

Three outcomes expected by day 90

List recurring work, permitted decisions, and required escalation.

Responsibilities and decision boundaries

Document coaching, tools, opportunity sources, coverage, and agreed compensation arrangements.

Support, resources, and working arrangements

Confirm role scope and arrangements with the brokerage before use.

Day-one requirements / trainable skills / reviewer

HIRING DECISION

Confirm readiness to grow

Owner: team leader and operations owner. Complete before committing to a new position.

Required input	Your evidence / owner / status
Work available: opportunity volume and existing capacity	_____
Training: named mentor and protected time	_____
Support: tools, onboarding, and service coverage	_____
Resources: added costs and ramp-up capacity reviewed	_____
Standards: documented and currently followed	_____

Account for leadership time

Weekly individual coaching requires 20 minutes × number of agents. Six agents require 120 minutes before preparation or follow-up. Add the team huddle and recruiting or onboarding commitments. Name a capable coach for work you cannot personally support.

Coaching time needed / time available / assigned coach:

Decision: ready / ready after fixes / not ready. Why?

Required fix / owner / completion date / reassessment date:

ROLE SELECTION

Match the role to the constraint

Owner: team leader. Review a week of actual work before choosing a role.

Observed constraint	Role or response to explore	Evidence to check
Qualified buyer opportunities exceed current service capacity	Buyer-focused agent	Unserved opportunities, appointments, and capacity of current agents.
Listing preparation and seller communication lack ownership	Listing-focused agent or listing support	Separate licensed client work from coordination tasks.
Scheduling, paperwork tracking, and handoffs interrupt production	Operations or transaction support	Time spent on recurring coordination and missed handoffs.
Agents have opportunities but struggle to convert or follow through	Coaching and process improvement first	Work samples, appointment preparation, and follow-up completion.

Illustrative decision

A leader spends eight hours each week chasing routine updates while current agents still have unused capacity. Investigate coordination support before adding another sales agent. The decision follows the work, not the desire for a larger roster.

Our observed constraint / evidence / role or response:

COMPLETED EXAMPLE

Buyer-agent role scorecard

Illustrative example only. Adapt the expectations to your market, team, and approved role scope.

Field	Completed example
Purpose / manager	Own assigned buyer relationships and follow-up. Reports to the team leader.
Day-90 outcome 1	Maintain a next action and due date for every assigned active client; reviewed weekly in CRM.
Day-90 outcome 2	Deliver all agreed client updates on time or arrange coverage; exceptions reviewed weekly.
Day-90 outcome 3	Complete an observed consultation and handoff meeting the team checklist; mentor reviews by day 90.
Responsibilities	Consultation preparation, approved follow-up, client updates, CRM records, and coordinated handoffs.
Decision boundaries	Own routine scheduling within the coverage plan. Escalate complaints, exceptions, and matters outside approved authority.
Support	Named mentor, weekly 20-minute coaching, CRM access, templates, and documented opportunity allocation.
Day-one / trainable	Day one: role eligibility, reliable follow-through, and clear communication. Trainable: team CRM workflow and consultation structure.

Make the example yours

Add your production targets using actual opportunity levels and a realistic ramp-up period. Agree on working and compensation arrangements separately. Confirm the role’s activities and supervision with your brokerage.

INTERVIEW EVALUATION

Compare evidence consistently

Owner: interviewer. Complete one sheet per candidate. Use the same core questions and task.

Candidate: _____ Role: _____ Date: _____

Criterion	Evidence observed	Rating
Follow-through and ownership	_____	N / P / C
Coachability and changed behavior	_____	N / P / C
Composure and service to others	_____	N / P / C
Client communication	_____	N / P / C
Organization and follow-up	_____	N / P / C
Role-specific readiness	_____	N / P / C

Use clear rating anchors

N: No supporting evidence yet. **P:** Partial evidence; needs clarification or development. **C:** Clear, specific evidence meeting the role criterion. Verify each essential requirement.

Use a short work sample

Use a fictional buyer with a missed appointment and unanswered questions. Request a follow-up message and CRM next steps. Assess clarity, ownership, composure, and judgment.

Advance / seek more evidence / decline. Evidence supporting decision:

Gap to resolve / action / reviewer / date:

FIRST-WEEK CHECKLIST

Make the first week concrete

Owner: onboarding lead. Assign a person and due date to each task; mark completion only after verification.

When	Task and completion evidence	Owner / done
Before day 1	Confirm role scorecard and arrangements; prepare access, mentor, schedule, and approved resources.	_____
Day 1	Review team promise, role boundaries, coverage, and escalation. Verify tool access with a login test.	_____
Day 2	Demonstrate CRM workflow. Agent creates a sample record with owner, next action, and due date.	_____
Day 3	Observe a consultation or approved simulation. Agent practices a client update; mentor gives feedback.	_____
Day 4	Practice a handoff and coverage scenario. Receiver confirms context, dates, and ownership.	_____
Day 5	Review work samples, answer questions, and agree on next week’s activity and first readiness check.	_____

New team member / onboarding lead / mentor:

Unfinished item / owner / due date:

First readiness review date and evidence to bring:

READINESS REVIEW

Verify before expanding ownership

Owner: mentor and team leader. Review at days 30, 60, and 90; repeat sooner when needed.

Review	Evidence to inspect	Decision
Day 30	Sample CRM records, a client-update role-play, and an escalation scenario. Agent explains the standard and demonstrates each workflow.	Ready / practice needed
Day 60	Actual follow-up, appointment preparation, client updates, and handoffs. Review exceptions and whether support needs are decreasing.	Ready / practice needed
Day 90	Repeated work samples, client-service commitments, and judgment within approved authority. Confirm readiness for each responsibility separately.	Ready / practice needed

Record a specific decision

Ready means the agreed behavior was demonstrated with sufficient evidence for the responsibility being transferred. Practice needed means name the gap, provide support, and set another review. Do not expand authority simply because a date has arrived.

Agent / review date / responsibility being assessed:

Evidence / decision / authority approved:

Practice needed / support owner / next review date:
