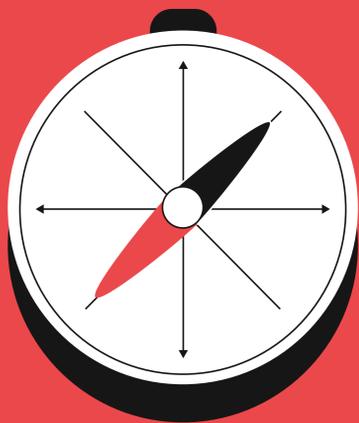


# Real estate recruiting plan template



## The 4 phases of agent recruiting

Every market is different, but great recruiting is consistent: clear value, disciplined selection, and continuous improvement.

This plan breaks recruiting into four phases you can map to monthly, quarterly, or annual targets — plus a pre-recruiting checklist to help make sure you're ready to compete.

*Note: This plan is a starting point. Adapt the language, stages, and resources to reflect your unique values and compliance requirements.*

### **Phase 0. Foundations (pre-recruiting)**

Clarify who you're hiring, why your team is the best place for them, and how you'll communicate and prove that value.

### **Phase 1. Sourcing and attraction**

Turn your value proposition into targeted campaigns across the highest-yield channels for your ideal agent.

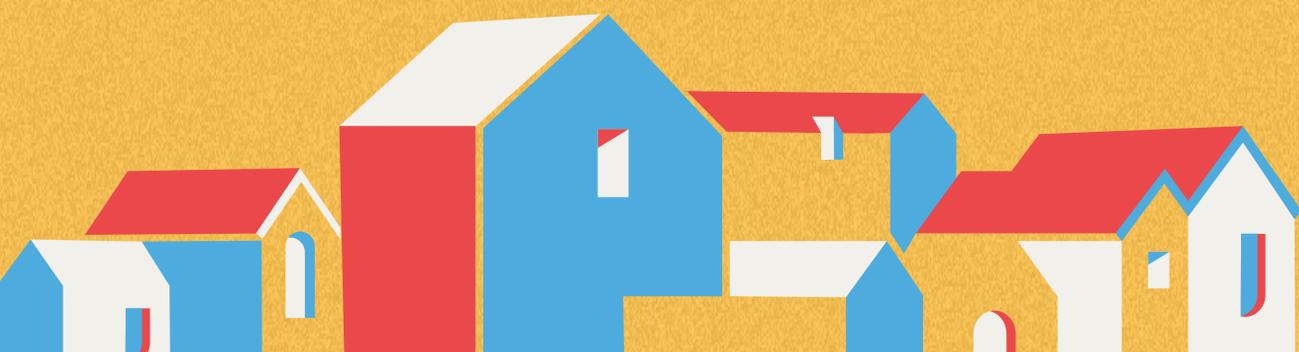
### **Phase 2. Selection and closing**

Run a value-forward process that evaluates fit, showcases support, and screens the right agents in.

### **Phase 3. Measurement and iteration**

Track outcomes, tighten the system, and keep your recruiting "OS" up to date with market changes.

**Let's get started**



## Phase 0. Foundations (pre-recruiting)

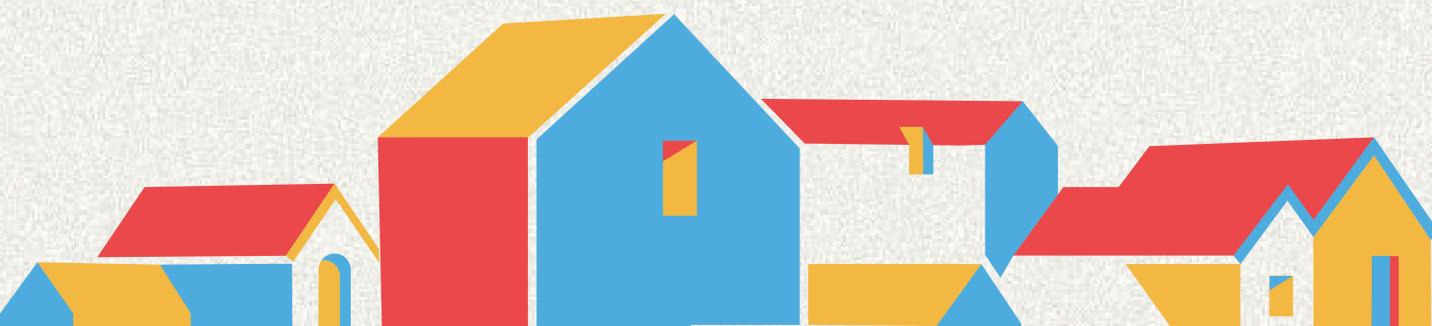
### Define your agent avatars

Owner: \_\_\_\_\_ | Date: \_\_\_\_\_

- **Segment by experience:** New-to-industry, emerging producers, top producers, team switchers, specialty/niche
- **List pain points and motivations:** What kind of leads, training, admin support, culture, splits, flexibility does each type of agent require?
- **Clarify non-negotiables:** Culture and values alignment, speed-to-lead standards

#### **Example:** *Individual Action Plan 1: Emerging Producer (6–15 sides/year)*

- **Who:** 1–3 years in, ~6–15 annual sides; hungry, plateaued by DIY marketing and inconsistent lead flow.
- **Pain points/motivations:** Wants steady, vetted leads; better scripts and accountability; tighter CRM discipline; clearer path to 24–36 sides.
- **What we offer:** High-quality lead flow + speed-to-lead system, weekly coaching, proven listing playbook, admin/TC leverage.
- **Non-negotiables:** Daily CRM hygiene; 5-min speed-to-lead; coachability; client-first standards; attends weekly training.
- **Channels:** Peer referrals, local MLS/association groups, LinkedIn, “systems over hustle” content.
- **Red flags:** Blames market/leads; resistant to role play; poor follow-up habits.
- **Interview focus:** Growth mindset, process discipline, responsiveness (test with same-day follow-up task)



## Real estate recruiting plan template

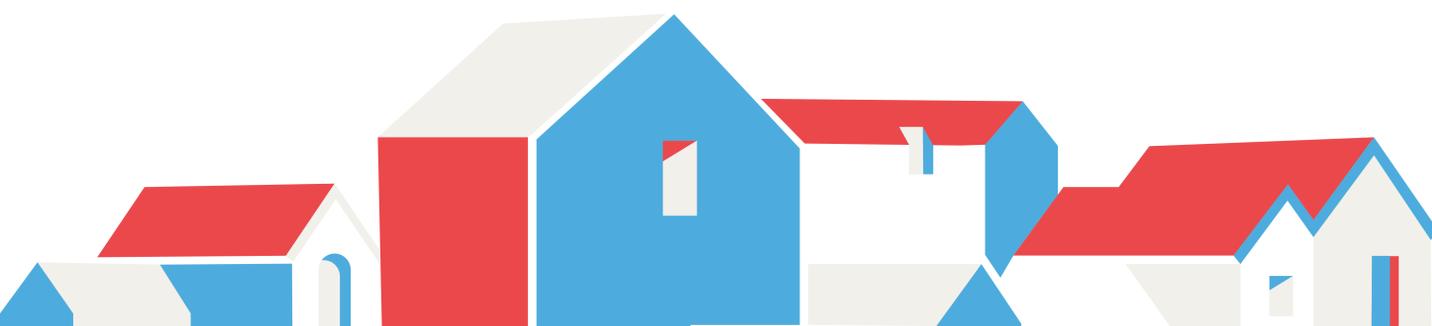
**Sharpen your agent value proposition**

Owner: \_\_\_\_\_ | Date: \_\_\_\_\_

- **Promise:** What outcome do agents get on your team? (e.g., “more human-to-human selling time”)
- **Proof:** Social proof, agent testimonials, production lifts, time savings, retention
- **Packaging:** Clear tiers of support, lead access, training cadence, coaching model, tech stack
- **Policy:** Transparent AI/tech guidelines and how they augment—not replace—agent performance

**Example:** *“More Selling Time” Value Prop*

- **Promise:** Spend more time in human-to-human selling and less in admin. We remove busywork so you can win more listings and close more buyers.
- **Proof:** Average agent increased monthly appointments by 37% and lifted annual sides from 12 to 24 within 12 months. 82% retention at 12 months; testimonials highlighting faster follow-up and cleaner pipelines.
- **Packaging:** Three tiers:
  - Launch: vetted leads, ISA support, TC coverage, weekly coaching.
  - Pro: personal coach, listing playbook, biweekly accountability.
  - Elite: partner-level marketing budget, dedicated VA, quarterly business planning.
  - Tech stack includes Follow Up Boss, dialer + texting, marketing automations, and TC workflow.
- **Policy:** AI assists with research, draft messaging, and task automation; agents own client counsel and negotiation.



## Real estate recruiting plan template

**Brand and culture assets**

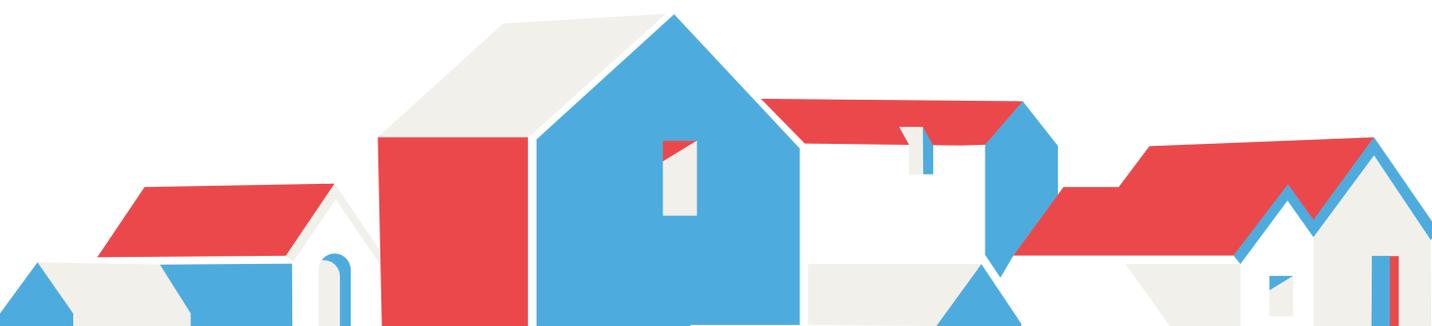
Owner: \_\_\_\_\_ | Date: \_\_\_\_\_

- **Culture code:** Values in action with examples from real client/agent experiences
- **Founder's monthly memo/newsletter:** Core framework to communicate direction
- **Team OS overview:** The backstage processes that keep agents in dollar-productive time

**Compliance and documentation**

Owner: \_\_\_\_\_ | Date: \_\_\_\_\_

- **Review recruiting language:** Update for compliance; prepare standard disclosures/agreements
- **Document interview process:** And fair hiring guidelines



## Phase 1. Sourcing and attraction

### Marketing strategy

Owner: \_\_\_\_\_ | Date: \_\_\_\_\_

- **Referrals:** Launch agent referral program with clear rewards and messaging
- **Social + community:** Founder-led content, agent spotlights, wins tied to client experience
- **Inbound content:** Guides, webinars, and podcast appearances that showcase culture and outcomes
- **Direct outreach:** CRM-powered sequences to target potential new agents

**Example:** Launch a Q4 “make your best move” campaign targeting switchers. Warm them up in Q3 via founder’s social and newsletter.



## Real estate recruiting plan template

**Candidate journey**

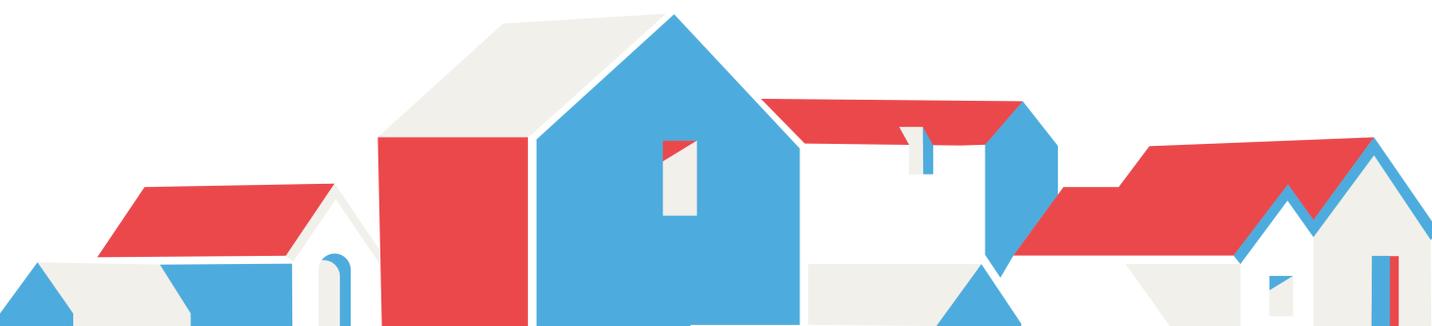
Owner: \_\_\_\_\_ | Date: \_\_\_\_\_

- **First touch to signed offer:** Define touchpoints and owners
- **Limit to two conversations pre-offer:** A quick fit call + deep-dive interview
- **“Invisible wires”:** Ensure automations hand off to humans at key moments

**Messaging and assets**

Owner: \_\_\_\_\_ | Date: \_\_\_\_\_

- **Interview guides & scripts:** Update to Address top exit drivers up front
- **Onboarding system:** Publish plan, 30–60–90 ramp, SOP links; assign ownership
- **Video walkthrough:** Cover Team OS, tech stack, coaching cadence



## Phase 2. Selection and closing

### Structured interview process

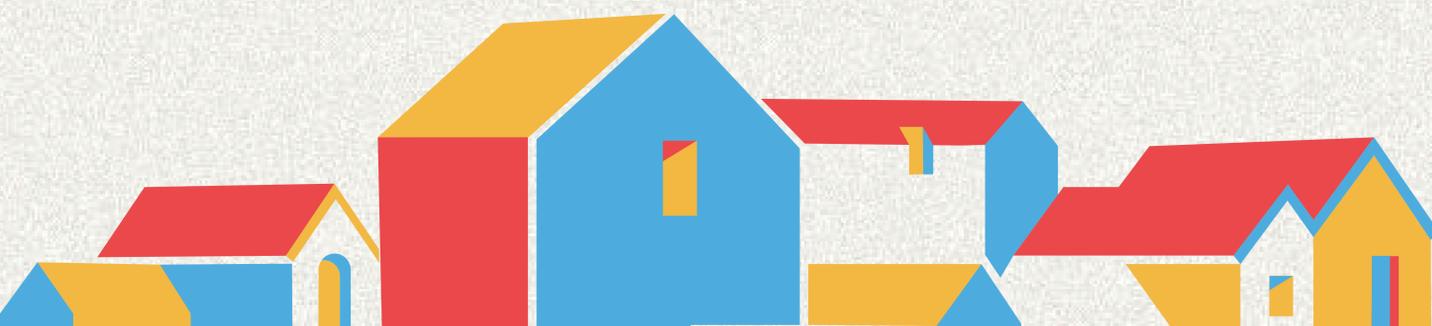
Owner: \_\_\_\_\_ | Date: \_\_\_\_\_

- **Opportunity call (15 minutes):** Verify goals, production, responsiveness; ask one key question that reveals drive.
- **Deep-dive interview (45 minutes):** Assess values alignment, client-first mindset, systems fluency, coachability; cover splits and accountability.
- **Skills validation:** Meet future collaborators for mutual fit, discuss expectations and culture

### Decision criteria and scorecards

Owner: \_\_\_\_\_ | Date: \_\_\_\_\_

- **Criteria buckets:** Values, Production Potential, Process Discipline, Client Experience, Growth Mindset.
- **Weighting model:** Per-avatar weights, must-have factors, nice-to-haves.
- **Disqualifiers:** Non-negotiables, zero-tolerance items, fail-fast cues.



## Foundations of a Top 10 Team

**Offer and objection handling**

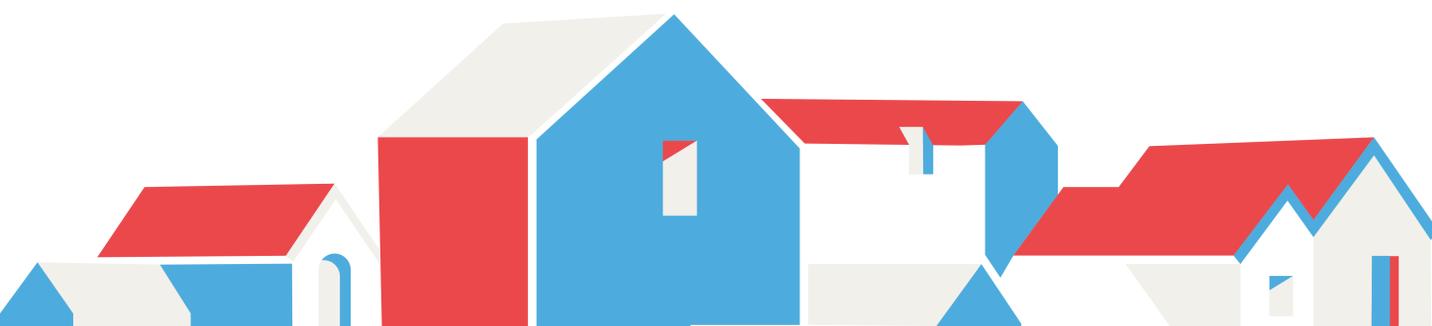
Owner: \_\_\_\_\_ | Date: \_\_\_\_\_

- **Offer package:** Transparent comp, resources, growth path, ramp expectations, and KPIs presented up front.
- **Support tiers:** “Choose your path” options that align goals with tiered support, lead access, coaching, and accountability.
- **Objection handling library:** Splits, leads, brand, autonomy, tech—answered with proof, data, and agent stories.
- **Decision flow:** Clear decision deadline, acceptance steps, and next-step checklist to reduce friction.

**Candidate experience**

Owner: \_\_\_\_\_ | Date: \_\_\_\_\_

- **Response guidelines:** Respond within X minutes to new inquiries and schedule the next step within 24 hours.
- **Step-by-step updates:** Send a recap after each step with resources, outcomes, and next actions.
- **Single point of contact:** Assign one owner and share a clear timeline from first touch to offer.
- **Two-touch flow:** Schedule deep-dive interview at the end of the fit call.



## Phase 3. Measurement and iteration

### Pipeline and performance metrics

Owner: \_\_\_\_\_ | Date: \_\_\_\_\_

- **Conversion:** Track stage-to-stage rates (screen → interview → offer → accept) and time-to-hire.
- **Quality:** Monitor 30/60/90-day activity and production, plus retention at 6/12 months.
- **ROI:** Compare cost to acquire/support by channel and map the ramp curve by agent type.
- **Segmentation:** Break out quality-of-hire by avatar and experience band (new, 6–12 months, 12+ months).

### Risk and compliance checks

Owner: \_\_\_\_\_ | Date: \_\_\_\_\_

- **Messaging and offers:** Audit recruiting messaging and offer materials quarterly.
- **Tech/AI policy:** Refresh AI/technology policies and ensure versions are agent-facing.
- **Onboarding disclosure:** Validate immersion/onboarding requirements are clearly disclosed to avoid misalignment.



# Agent Recruiting Checklist

## Foundations

- Agent avatars finalized and approved
- Agent value proposition complete
- Compensation sheet + growth path visuals published
- Culture packet + Team OS overview ready
- Interview SOP, scorecards, and compliance review complete
- Onboarding/bootcamp plan approved

## Sourcing

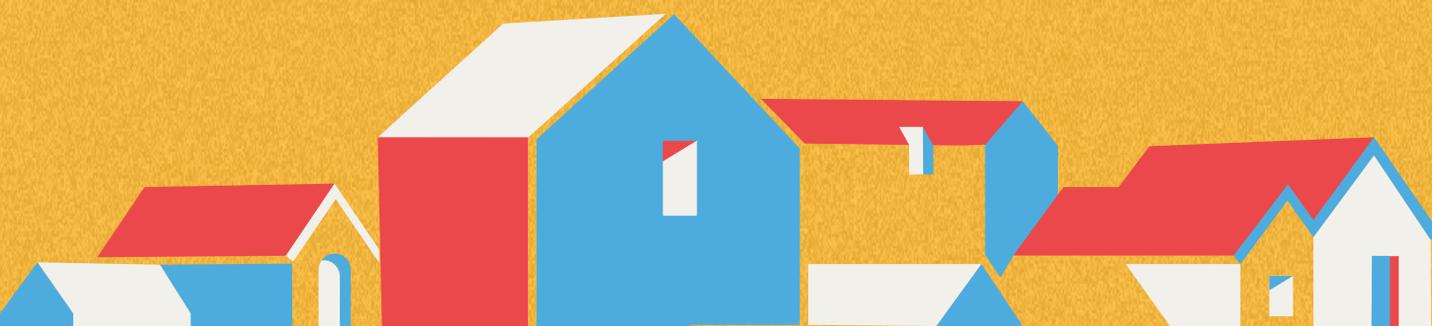
- Recruitment marketing calendar live (referrals, social, content, outreach)
- Candidate journey configured in CRM
- Landing pages, videos, case studies published
- Monthly info session scheduled with registration flow

## Selection

- Screen and deep-dive interview guides loaded into calendar tool
- Evaluation rubric added to fit call
- Role-play scenarios and CRM tasks prepared
- Onboarding plan updated

## Measurement

- Recruitment dashboard live
- Quarterly channel/messaging review on calendar
- Compliance/AI policy refresh scheduled



## Build a recruiting engine you can trust

You don't need more interviews—you need a system that attracts, selects, and improves. This plan gives you the playbook.

Set expectations early, run structured interviews, and measure ramp and retention to keep raising the bar.

### How Follow Up Boss supports recruiting

Use recruiting-specific stages and tags to **separate candidates from clients**, capture context with notes and custom fields, and power timely outreach with **Smart Lists**.

Automate touchpoints with **Action Plans**, send newsletters with batch emails, and track conversions in a separate Deals pipeline so **you know what's working**.



#### Sign up

Sign up for your free 14-day trial of Follow Up Boss and start building a team operating system you can scale.

[SIGN UP NOW →](#)

