



The Five Stages of Business Growth



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Dale Carlton, JD, CRS

- Principal Broker/Owner of Carlton Realty, Inc.
- Attorney at Law
- \$200 Million+ in Personal Sales
- \$4 Billion+ in Sales as Broker for Agents



- Certified Senior Instructor for CRS
- Instructor for GRI, REBAC, IDW, ITI, & RLI
- Professor for REALTOR® University
- National President for RRC/CRS
- National Instructor to over 75,000 people



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<del>Annual New Car</del>	<del>Mission Statement</del>
<del>Lake Home</del>	<del>Strategic Plan</del>
<del>Australia Vacation</del>	<del>Know Market Statistics</del>
<del>Debt Free</del>	<del>Hire an Assistant</del>
<del>Trust for Children</del>	<del>Plan for Retirement</del>
<del>Nice Boat</del>	<del>Work from a Budget</del>
<del>Retire at 65</del>	<del>Marketing Plan</del>

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# The Five Stages of Business Growth

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# At what stage of growth is your business?

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# In what stage do you want your business?

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# Ideas

(0-12)

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# Ideas

- 0-12 Transactions per year
- Majority of agents
- Business comes in cycles



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# Ideas

What tasks and duties consume an agent's time in Stage 1?

**Bridge to Stage 2**

Bridge: Better organization  
When: After averaging 1 closing per month



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# Organization

(12-36)

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# Organization

- 12-36 Transactions per year
- Better managers of time
- Creating systems

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# Organization

What systems can be implemented?

**Bridge to Stage 3**

Bridge: Hire an Assistant  
When: After averaging 3 transactions per month

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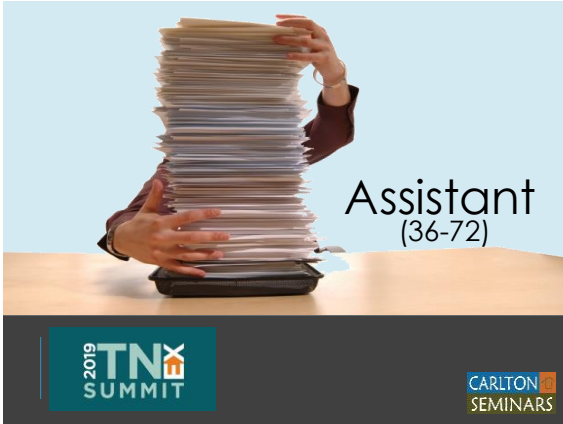
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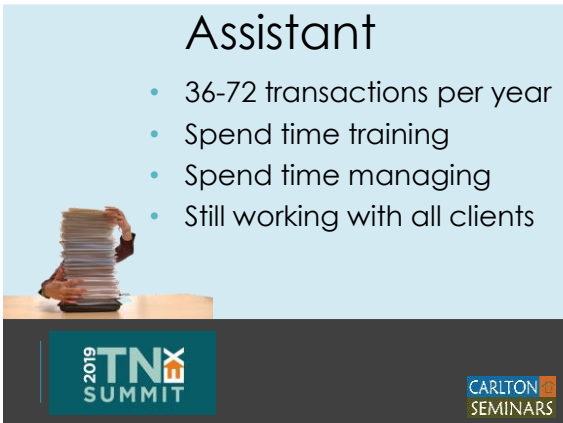
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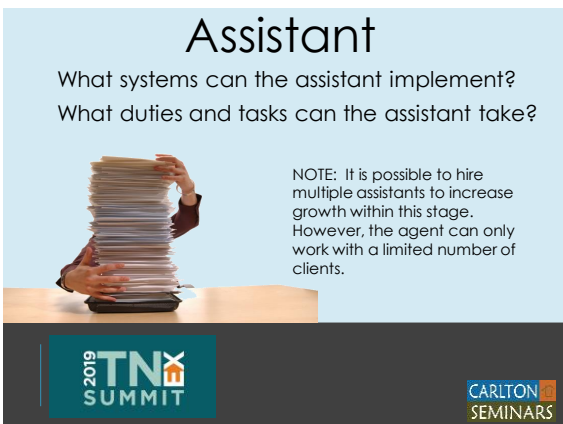
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# Assistant unlicensed

**Can:**

- Deliver documents
- Pick up keys
- Answer phone
- Secure public information
- Set appointments
- Place signs
- Type forms for approval
- Write ads for approval
- Assemble closing documents
- Hand out objective written listing information



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# Assistant unlicensed

**Cannot:**

- Show property
- Solicit by phone or person
- Answer title, finance, or closing Questions
- Host open houses
- Staff booths for shows
- Give info not on written material
- Represent themselves as an agent
- Negotiate or discuss the terms of a sale
- Be paid on the basis of real estate activity
- Be a go-between for buyers and sellers
- Answer Q's of properties listed



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# Assistant

Assistants may learn your system and leave, be prepared to hire again.

**Bridge to Stage 4**

Bridge: Specialized help  
 When: After averaging 6 transactions per month



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Team  
(72-150)

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Team

- 72-150 transactions per yr
- Specialized help
- Buyer's agent
- Listing agent
- Closing agent
- Limiting Client Time

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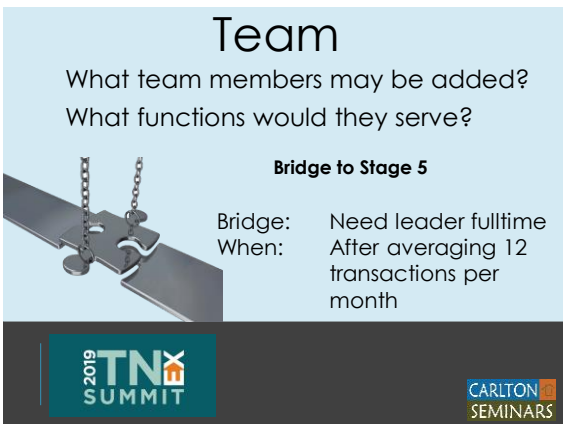
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Team

What team members may be added?  
What functions would they serve?

**Bridge to Stage 5**

Bridge: Need leader fulltime  
When: After averaging 12 transactions per month

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CEO  
(150+)

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CEO

- 150+ transactions per year
- No longer working with clients
- Managing the team
- Exponential growth



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CEO

What are the duties of the CEO?

**No Identified Bridge After Stage 5**



CEO must train a successor and position the business to be sold at retirement

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