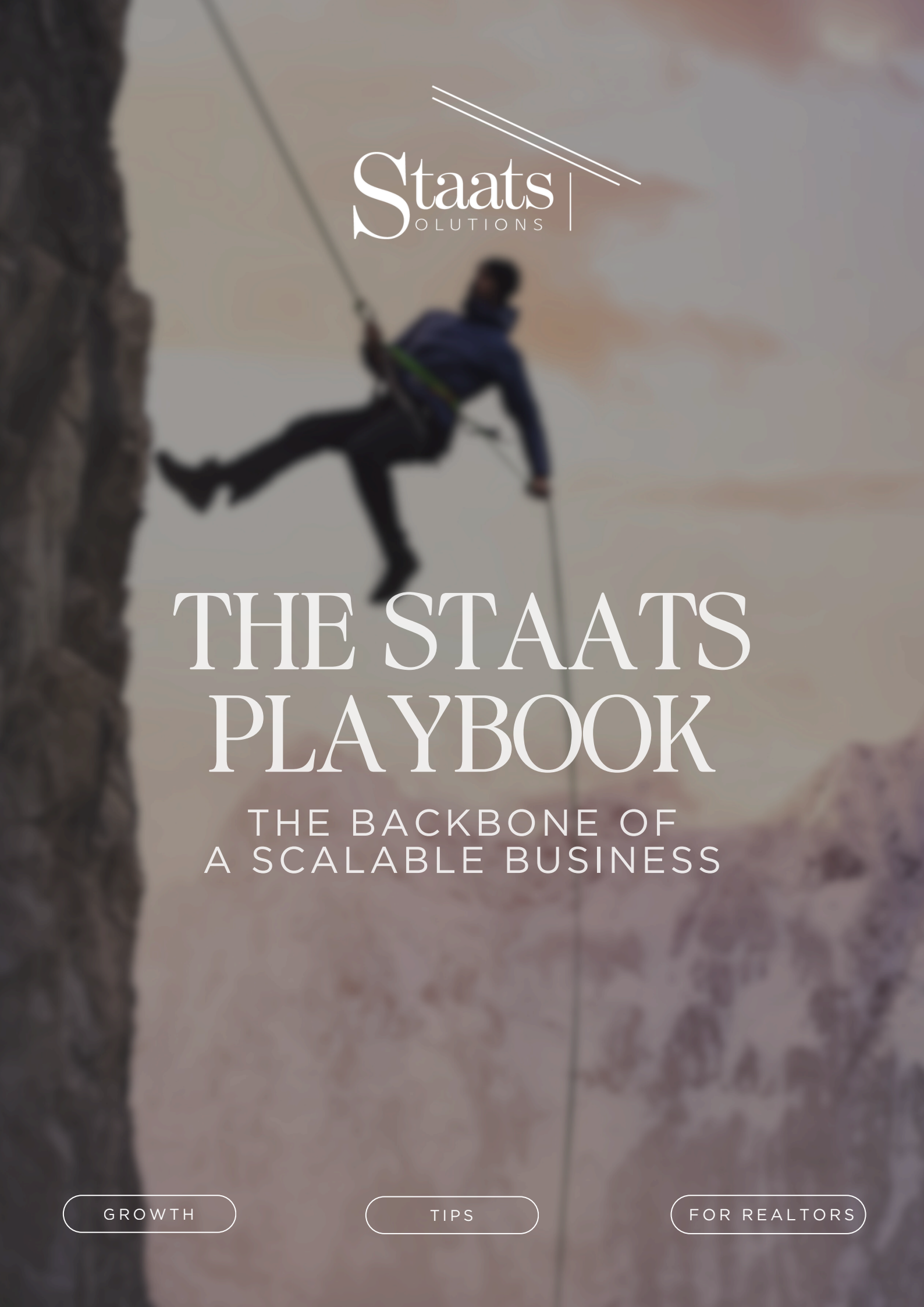


A person in a blue jacket and dark pants is rappelling down a rope. The background is a soft, hazy sunset or sunrise sky with warm tones. The person is positioned in the upper middle of the frame, moving downwards.

Staats
OLUTIONS

THE STAATS PLAYBOOK

THE BACKBONE OF
A SCALABLE BUSINESS

GROWTH

TIPS

FOR REALTORS



IMPLEMENTING SYSTEMS THAT SCALE

*Most businesses don't lack systems.
They struggle to build, use, and improve them consistently.
This playbook was built to close that gap.*

Most businesses already have systems in place — often more than they realize. The challenge isn't simply creating SOPs. It's building processes people can actually follow, use, and rely on as the business grows.

At a certain point, the systems that once worked start to feel heavy. Leaders answer the same questions repeatedly. Workflows depend too much on memory. Training takes longer than it should. And processes that made sense at one stage of business no longer support the next.

This playbook is designed to help you strengthen the infrastructure behind your business — from organizing and assigning ownership to your SOPs, to building repeatable workflows, training your team, choosing the right tools, and knowing when a system needs to evolve.

The goal isn't more documentation. It's clearer systems, stronger execution, and a business that can grow without everything depending on you.

Jennifer Staats

GROWTH

TIPS

FOR REALTORS

PLAYBOOK MODULES

Playbook Modules

01

THE SYSTEMS MINDSET

- Shift from task-based thinking to systems that support scale
- Use SOPs to reduce decisions, risk, and leadership dependency
- Establish the foundation for consistent execution across the business

02

DESIGNING THE SOP ECOSYSTEM

- Organize SOPs into clear layers instead of one massive library
- Separate core, role-based, support, and growth workflows
- Create a navigable system your team can find, follow, and trust

03

OWNERSHIP, ACCOUNTABILITY & ROLE DESIGN

- Assign clear SOP ownership to prevent decay and confusion
- Design systems around role outcomes, not departments
- Protect leadership time by defining where execution begins and ends

04

TRAINING, ADOPTION & ENFORCEMENT

- Turn SOPs into onboarding and training paths
- Replace shadowing with documented execution
- Establish enforcement loops that create clarity without micromanagement

05

SCALING, MAINTENANCE & EVOLUTION

- Evolve SOPs across growth stages without disruption
- Maintain living systems through audits, feedback, and version control
- Use the Systems That Scale Scorecard to identify gaps and priorities

06

FROM PROCESS TO WORKFLOW

- Map processes into clear, repeatable steps
- Define triggers, timelines, responsibilities, and outcomes
- Test and refine workflows before building them into your systems

07

MAKING SYSTEMS EASY TO USE

- Choose the right format for each process: written, visual, video, or task-based
- Centralize systems so your team can easily find and follow them
- Use technology, templates, and automation to support execution

08

MEASURE, AUDIT & IMPROVE

- Define what successful execution looks like
- Use performance, feedback, and audits to identify breakdowns
- Refine, simplify, or retire systems as the business evolves

09

BONUS — SYSTEMS THAT SCALE ACTION PLAN

- Turn one existing process into a clear, measurable system
- Identify the owner, trigger, workflow, tools, and review date
- Leave with one system ready to implement

01

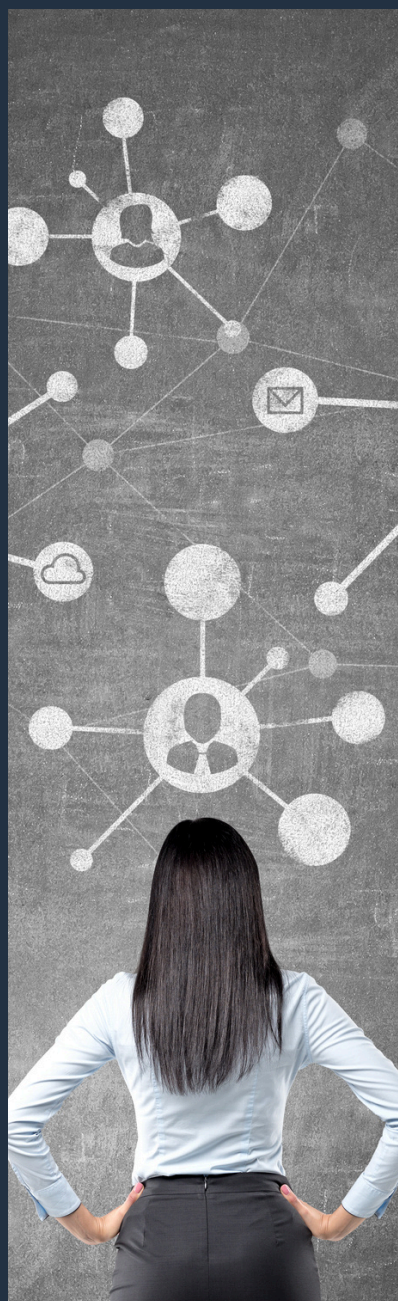
MODULE 01

The Systems Mindset Shift

FROM PROCESSES TO OPERATING INFRASTRUCTURE

If your business still runs on explanations, approvals, and constant check-ins, it's not a people problem — it's a systems problem.

At scale, growth doesn't break because of effort. It breaks because decisions, training, and execution live in people's heads instead of in infrastructure. SOP Playbook 2.0 starts by reframing what systems are actually meant to do. This module establishes the mindset required to move from documenting tasks to building systems that run the business. **Here's what that shift looks like in practice:**



SYSTEMS AS DECISION-REDUCTION TOOLS

- Eliminate repeat questions by defining the default action
- Remove ambiguity from day-to-day execution
- Reduce leadership involvement in routine decisions

SYSTEMS AS TRAINING ACCELERATORS

- Replace shadowing with documented execution
- Give new hires clarity on what "done right" looks like
- Shorten ramp time without sacrificing quality

SYSTEMS AS RISK-REDUCTION FRAMEWORKS

- Create consistency across people, roles, and volume
- Reduce errors caused by assumptions or memory
- Protect the business as complexity increases

SYSTEMS AS DELEGATION ENABLERS

- Define where thinking ends and execution begins
- Empower roles with clear ownership and authority
- Free leadership from being the default problem-solver

THE CORE PRINCIPLE

If a task requires thinking every time, it isn't a system yet.

This module sets the foundation for everything that follows. Once the mindset shifts, SOPs stop being documents — and start becoming operating infrastructure.



Pro Tip: If a process depends on someone remembering what to do, it isn't a system yet. Strong systems make the next step obvious—without needing context, reminders, or follow-up.

02

MODULE 02

Designing The SOP Ecosystem

Building Systems People Can Actually Use

Efficiency doesn't come from having more SOPs — it comes from having the right ones, organized in a way your team can actually navigate. Most businesses don't struggle because systems don't exist. They struggle because everything lives in one massive folder, nothing is clearly owned, and people aren't sure which SOP applies to them. This module focuses on designing an SOP ecosystem that supports execution instead of slowing it down. **Here's how scalable teams structure their systems:**

CORE BUSINESS SOPS

- Define non-negotiable workflows that protect the business
- Create consistency across people, volume, and transactions
- Establish the baseline standards everyone operates from

ROLE-SPECIFIC SOPS

- Clearly outline what each role owns and executes
- Reduce hand-offs, assumptions, and repeated explanations
- Empower team members to operate independently

SUPPORT & EXCEPTION SOPS

- Document how to handle edge cases and breakdowns
- Reduce escalation by giving clear next steps
- Maintain consistency even when things don't go as planned

GROWTH SOPS

- Systemize onboarding, recruiting, and expansion workflows
- Ensure growth doesn't dilute standards
- Support scale without reinventing processes each time

NAVIGATION & USABILITY

- Organize SOPs so the right ones surface at the right time
- Design systems that are easy to find, follow, and update
- Remove friction that causes teams to bypass documentation



Pro Tip: If your team needs help finding the right SOP, the system isn't broken — the structure is. Scalable SOPs are organized by when they're used, not just what they contain.

03 MODULE 03

Ownership, Accountability, & Role Design



WHERE SYSTEMS STOP ESCALATION. NO SYSTEM WORKS WITHOUT OWNERSHIP.

Most operational breakdowns don't happen because SOPs don't exist — they happen because no one is clearly responsible for maintaining them, using them, or enforcing them. This module is about assigning ownership in a way that creates clarity without micromanagement. When ownership is clear, systems stop escalating to leadership and start running through roles instead.

Here's how SOP Playbook 2.0 defines real ownership:

1

SOP OWNERSHIP MODEL

- Assign a clear owner responsible for accuracy and updates
- Separate ownership from execution to avoid bottlenecks
- Establish review cadences so SOPs stay current

Ownership doesn't mean doing the work — it means protecting the system.

2

ROLE-BASED SYSTEM DESIGN

- Build SOPs around role outcomes, not departments
- Define exactly what each role owns, executes, and escalates
- Eliminate ambiguity that causes delays and duplicate work

When roles are clear, teams move faster without asking permission.

3

ACCOUNTABILITY WITHOUT MICROMANAGEMENT

- Tie SOP usage to performance expectations
- Make systems the default answer before escalation
- Remove emotion from enforcement by relying on clarity

Accountability becomes structural — not personal.



Pro Tip: If a task regularly escalates to leadership, it's not a people problem — it's a system ownership problem. Clarify who owns the decision before documenting the process.

04

MODULE 04

Training Adoption & Enforcement

MAKING SYSTEMS THE DEFAULT

Well-documented SOPs don't create consistency. Adopted SOPs do. This module focuses on the most overlooked part of operations: what happens after SOPs are written. Without intentional training, clear expectations, and consistent enforcement, even the best systems quietly get ignored. This module shows how to move SOPs from reference material into daily behavior.

WHERE ADOPTION BREAKS DOWN:

SOPs Are Introduced Once — Then Forgotten

Teams are shown systems during onboarding, but usage isn't reinforced or measured.

Shadowing Replaces Systems

New hires learn by watching people instead of following documented processes, creating inconsistency from day one.

Enforcement Feels Personal

When expectations aren't defined, corrections feel subjective instead of structural.

HOW TO TURN SOPs INTO TRAINING TOOLS:

SOPs as Onboarding Paths

Structure onboarding around systems, not explanations. Each SOP becomes a required step in learning how the business actually runs.

Checklists & Milestones

Pair SOPs with execution checklists so progress is visible and measurable.

Default Before Escalation

Train teams to reference the SOP first — escalation only happens when true exceptions arise.

ENFORCEMENT WITHOUT MICROMANAGEMENT:

Clear Usage Expectations

Define when SOPs must be followed and when flexibility is allowed.

Neutral Correction Loops

Remove emotion by anchoring feedback to the system, not the person.

Leadership Backed by Structure

When systems are clear, enforcement becomes consistent and fair — not reactive.

OUTCOME OF STRONG ADOPTION:

- Faster ramp time
- Fewer repeat mistakes
- Less rework and explanation
- Reduced leadership involvement
- Systems that actually stick under pressure



Pro Tip: If SOP usage isn't part of onboarding, performance reviews, or daily workflows, adoption will always be optional — and optional systems don't scale.

MODULE 05

Scaling Maintenance & Evolution

KEEPING SYSTEMS ALIGNED AS THE BUSINESS GROWS

Systems that don't evolve don't fail loudly — they quietly get bypassed. As businesses grow, complexity increases. What once worked smoothly begins to feel heavier, slower, or misaligned. This module focuses on how to keep systems relevant, trusted, and effective as the business moves through new stages of growth. Scaling isn't about adding more systems. It's about refining the right ones at the right time.

SYSTEMS ACROSS GROWTH STAGES

Solo → Small Team

Systems reduce decision fatigue and prevent everything from living in the founder's head.

Brokerage → Multi-Location

Systems must support replication without constant oversight.

Team → Brokerage

Consistency becomes critical. SOPs protect standards as volume and headcount increase.

Service Business → Scalable Ops Company

Processes evolve into infrastructure that supports leadership, not dependency.

Recognizing when a system has been outgrown is as important as building it in the first place.

MAINTAINING LIVING SYSTEMS

Quarterly SOP Audits

Review what's still working, what's being ignored, and what needs to be updated.

Feedback From the Field

The people using the systems daily are your best source of insight.

Version Control & Change Logs

Track updates clearly so teams trust the system and know what changed.

Sunsetting Outdated SOPs

Removing what no longer serves the business is just as important as building new workflows.



Pro Tip: If a system hasn't been reviewed since the business last changed, it's already outdated. Schedule system reviews the same way you schedule financial or performance reviews.



MODULE 06

From Process to Workflow

TURNING REPEATED TASKS INTO SYSTEMS YOUR TEAM CAN FOLLOW

If a process only lives in conversation, memory, or scattered notes, it isn't ready to scale.

As businesses grow, repeated tasks need more than good intentions — they need structure. This module is about turning everyday processes into clear workflows your team can follow consistently. A strong workflow removes guesswork, creates clarity, and makes it easier to delegate, train, and improve execution over time. **Here's what that looks like in practice:**



WORKFLOWS AS CLARITY TOOLS

- Define the purpose and desired outcome of the workflow
- Identify the trigger that starts the process
- Break work into clear, sequential steps

WORKFLOWS AS EXECUTION MAPS

- Assign responsibilities by role, not by person
- Add timelines, handoff points, and due dates
- Make the next step obvious for every task

WORKFLOWS AS CONSISTENCY BUILDERS

- Standardize templates, checklists, and repeatable actions
- Simplify or remove unnecessary steps
- Create processes the team can follow the same way every time

WORKFLOWS AS TEST-AND-REFINE SYSTEMS

- Test the workflow before rolling it out fully
- Identify confusion, bottlenecks, or missed steps
- Review and improve the process as the business evolves

THE CORE PRINCIPLE

If a workflow can't be followed without explanation, it isn't ready yet.

This module turns operational knowledge into something usable. Once a process is mapped, assigned, and documented clearly, it becomes easier to train, easier to delegate, and far more reliable under pressure.



Pro Tip: Build workflows around triggers and roles — not people and memory. Strong workflows make it clear what starts the process, what happens next, and who owns each step.

07

MODULE 07

Making Systems Easy to Use

*Building systems agents
can actually follow*



MAKE THE RIGHT SYSTEM EASY TO FIND

A system only works if the people using it can quickly find it, understand it, and know what to do next. The goal is not to force every process into the same format. Some workflows are best documented in writing. Others need screenshots, video, checklists, or task-management software. What matters is choosing the format that makes execution easiest — then keeping everything organized and accessible. **Here's how to make systems easier to use:**

CHOOSE THE RIGHT FORMAT

- Use written instructions for clear, repeatable processes
- Add screenshots or video when visual guidance improves understanding
- Use checklists when completion and sequence matter

CENTRALIZE YOUR SYSTEMS

- Create one clear home for SOPs, workflows, and training resources
- Organize information so people know exactly where to look
- Avoid scattering instructions across folders, inboxes, and conversations

BUILD SYSTEMS INTO THE TOOLS YOU USE

- Put tasks and deadlines inside your project or task-management software
- Connect workflows to the CRM when the process starts with a lead or client
- Keep execution as close as possible to where the work already happens

TEMPLATE WHAT REPEATS

- Create reusable emails, forms, checklists, and documents
- Standardize recurring communication and handoffs
- Reduce unnecessary decisions by giving the team a clear starting point

AUTOMATE WITH INTENTION

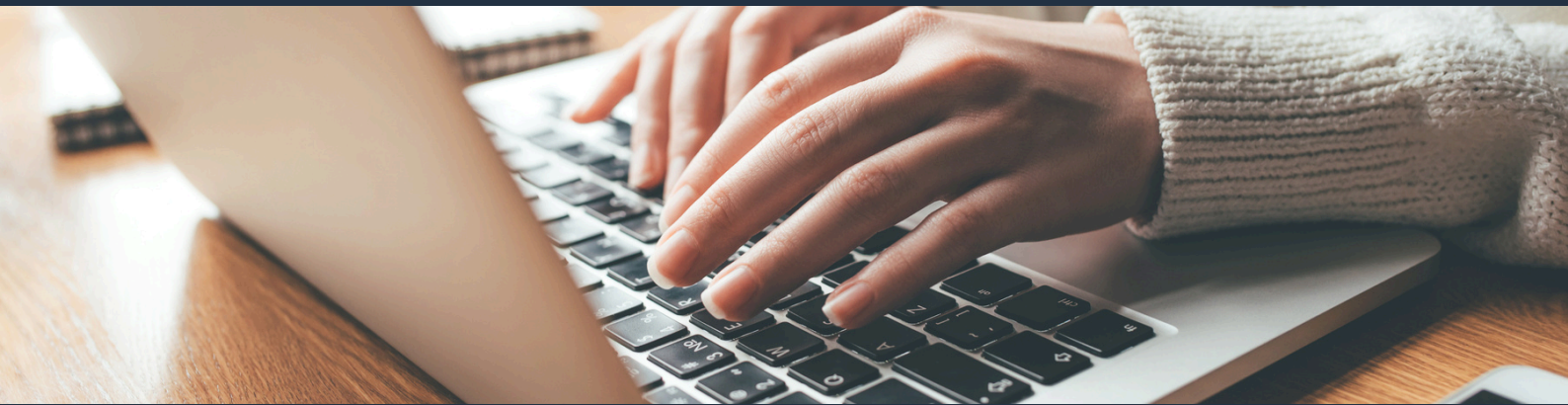
- Automate repetitive administrative steps where it improves consistency
- Keep human judgment and personal communication where they matter
- Use technology to support the process — not complicate it



Pro Tip: If your team has to ask where a process lives, how to use it, or what happens next, there is still friction in the system. Make the right action easier than working around it.

08 MODULE 08

Measure, Audit & Improve



STRONG SYSTEMS ARE MEASURED, REVIEWED, AND REFINED.

A system isn't successful just because it exists. It has to produce the right result, be followed consistently, and continue working as the business changes.

This module is about creating a simple feedback loop around your systems so you can see what is working, identify where execution is breaking down, and make improvements before small problems become bigger ones. The older SOP & Training material already introduces KPIs, performance reviews, feedback, and compliance audits as ways to evaluate execution. **Here's how to keep your systems effective:**

1

DEFINE WHAT SUCCESS LOOKS LIKE

- Identify the outcome each system is designed to produce
- Set clear standards for timing, quality, and completion
- Use simple KPIs or performance measures where they add visibility

If success isn't defined, it's difficult to know whether the system is actually working.

2

AUDIT EXECUTION, NOT JUST DOCUMENTATION

- Review whether the process is actually being followed
- Look for missed steps, delays, workarounds, and recurring mistakes
- Ask the people using the system where friction still exists

The goal of an audit is not to find fault — it is to find where the system needs support.

3

REFINE WHAT NO LONGER WORKS

- Update processes when roles, technology, or volume change
- Simplify unnecessary steps and remove outdated workflows
- Track meaningful changes so the team knows what was updated and why

Strong systems evolve with the business instead of becoming something the team eventually works around.



Pro Tip: If the same breakdown keeps happening, don't just correct the task. Review the system behind it. Repeated problems are often signals that the process, ownership, or expectations need to change.

Systems that scale action plan worksheet

Choose one process in your business that feels inconsistent, overly manual, or too dependent on one person. Use this worksheet to turn it into a clearer, more repeatable system.

1. PROCESS TO IMPROVE

What process are you working on?

2. WHAT'S NOT WORKING?

Where is the friction, confusion, delay, or inconsistency?

3. DESIRED OUTCOME

What should this process accomplish when it works well?

4. START TRIGGER

What specific action or event starts this workflow?

5. OWNER

Which role is responsible for overseeing this process?

6. KEY STEPS

What needs to happen from start to finish?

- 1.
- 2.
- 3.
- 4.
- 5.

7. WHERE WILL THIS SYSTEM LIVE?

CRM, task-management platform, shared drive, SOP library, checklist, etc.

8. WHAT CAN BE TEMPLATED OR AUTOMATED?

Emails, reminders, tasks, forms, checklists, handoffs, or recurring steps.

9. HOW WILL YOU KNOW IT'S WORKING?

What result, KPI, deadline, or standard will tell you the system is effective?

10. NEXT REVIEW DATE

START WITH ONE SYSTEM.

Build it clearly. Put it into use. Measure what happens. Then improve from there.

GROWTH

TIPS

FOR REALTORS

ARE YOU READY TO SCALE?

Operations and *Marketing* Built for Real Estate Businesses Ready to Scale.

We build the systems, structure, and support behind successful agents, teams, and brokerage, so growth feels intentional, not chaotic.

Book a consult call today with Staats to see how our services can help your business thrive.

