REAL GROWTH COLLECTIVE

OWN MORE THAN YOUR SALES

ENTERPRISE BRIEF | TEAMS AND BROKERAGES

Identity + Infrastructure Enterprise Brief

A decision framework for team leaders and independent brokerage owners evaluating a larger migration or customized Real structure.

PRESERVE WHAT MATTERS. REBUILD WHAT MUST CHANGE.

Identity. Governance. Economics. Compliance. Technology. People. Transition.

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The enterprise decision is a system decision.

Brand retention matters, but the operating model must also work under new supervision, technology, agreements, and controls.

DECISION ARCHITECTURE

Identity

Brand, market position, client promise, culture, and public continuity.

Authority

Broker supervision, governance, decision rights, entity limits, and approvals.

Economics

Retained economics, costs, team model, ownership, and optionality.

Infrastructure

Transactions, data, technology, accounting, compliance, and reporting.

Migration

People, clients, licenses, active business, communication, and stabilization.

USE THE MAP

01 Private Label is an eligibility- and approval-based path for established independent brokerages, not a universal promise.

02 Real states that eligible Private Label brokerages can retain their public-facing brand while operating under Real's brokerage structure.

03 A team or brokerage may need a different path based on state availability, production, tenure, claims, and regulatory factors.

04 Do not choose a structure until identity, authority, economics, technology, people, and transition dependencies are visible together.

WHAT MUST REMAIN TRUE FOR THE MIGRATION TO BE CONSIDERED SUCCESSFUL?

Identity, authority, and governance

Keeping a name is not the same as keeping every decision right.

IDENTITY

- [ ] Which names, trademarks, domains, signs, websites, phone numbers, content, and market positions must remain?
- [ ] Which advertising disclosures, brokerage identifiers, trade-name registrations, or state approvals will change?
- [ ] What client-facing promise must survive the transition without implying an authority the organization no longer holds?

AUTHORITY

- [ ] Who becomes the responsible or managing broker, and which decisions move to Real or a state broker?
- [ ] Which agreements, trust-account functions, compliance approvals, vendor obligations, and signatures can no longer be controlled locally?
- [ ] What governance forum will resolve conflicts between local leadership, brokerage policy, and agent needs?

DECISION RIGHT OR BRAND ELEMENT REQUIRING WRITTEN CONFIRMATION

Economics, technology, and data

Model the enterprise at the transaction, agent, leader, and organization levels.

ECONOMICS

- [ ] Build a current-state and proposed-state model using verified official terms, real agent cohorts, and conservative assumptions.
- [ ] Separate brokerage economics, team economics, ownership programs, revenue share, transition costs, and vendor savings.
- [ ] Identify which economics depend on production, eligibility, retention, program rules, or continued leadership work.

TECHNOLOGY AND DATA

- [ ] Map CRM, transaction, accounting, commission, website, IDX, email, domains, phones, data warehouse, ad accounts, and reporting ownership.
- [ ] Define authorized data migration, record retention, integrations, role-based access, cybersecurity, privacy, and rollback steps.
- [ ] Require end-to-end testing for lead routing, transaction compliance, commission statements, dashboards, and agent support before cutover.

ECONOMIC ASSUMPTION OR SYSTEM DEPENDENCY TO VALIDATE

People, transition, and operating continuity

A migration succeeds when agents and clients experience clarity while the back end changes underneath them.

PEOPLE

- [ ] Inventory every owner, leader, broker, staff member, agent, contractor, vendor, and shared-service relationship.
- [ ] Document individual agreements, licenses, compensation, benefits, roles, access, notice duties, and independent decisions.
- [ ] Design the day-one leadership, onboarding, transaction, compliance, technology, and communication support structure.

TRANSITION

- [ ] Sequence active listings, escrows, buyer agreements, referrals, trust funds, licenses, MLS, insurance, brand, data, and public messaging.
- [ ] Define no-go conditions, written approvals, escalation owners, rollback points, and 48-hour stabilization audits.
- [ ] Use a 30-, 60-, and 90-day operating review to validate service, adoption, economics, retention, compliance, and agent experience.

HIGHEST-RISK STAKEHOLDER OR CONTINUITY DEPENDENCY

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SCORE

Enterprise decision-readiness scorecard

A zero in authority, compliance, active business, or data is a stop signal regardless of total score.

Score each category 0, 1, or 2. Evidence beats intention.

Strategic case

Leadership agrees on why change is needed and what measurable outcome defines success.

☐ 0 ☐ 1 ☐ 2

Path eligibility

The proposed team, ProTeams, or Private Label path is officially confirmed and regionally available.

☐ 0 ☐ 1 ☐ 2

Identity continuity

Brand ownership, disclosures, registrations, client messaging, and public transition are mapped.

☐ 0 ☐ 1 ☐ 2

Authority and compliance

Broker supervision, agreements, trust funds, approvals, and decision rights are documented.

☐ 0 ☐ 1 ☐ 2

Economics

Current and proposed models use verified terms, cohorts, sensitivities, and full transition costs.

☐ 0 ☐ 1 ☐ 2

Technology and data

Ownership, migration, retention, integrations, security, testing, and rollback are ready.

☐ 0 ☐ 1 ☐ 2

People and clients

Individual choices, active business, support, communication, and escalation are sequenced.

☐ 0 ☐ 1 ☐ 2

Execution governance

Owners, milestones, no-go conditions, decision logs, and stabilization reviews are active.

☐ 0 ☐ 1 ☐ 2

WHAT MUST BE RESOLVED BEFORE AN ENTERPRISE REVIEW CAN ADVANCE?

Enterprise diligence action plan

Convert the structural conversation into owned evidence and dated decisions.

PRIORITY / DECISION	OWNER	DUE	STATUS

NO-GO CONDITION AND FINAL DECISION AUTHORITY

DAY-90 SUCCESS MEASURES

Official references and next step

Use current official materials before relying on any program, policy, eligibility, or migration statement.

OFFICIAL SOURCES

What is Private Label? — OPEN

Official overview of eligible brokerages retaining their established brand.

Who is eligible for Private Label? — OPEN

Current approval factors and regional considerations.

Private Label Journey — OPEN

Application, review, agreement, onboarding, and operations sequence.

Private Label FAQs — OPEN

Brand, entity, broker authority, trust accounts, agents, offices, and exit questions.

What is ProTeams? — OPEN

Current official overview of the configurable team-level structure.

BRING THE CURRENT STATE

Evaluate structure before migration.

(626) 888-1540 **@grantstar** **BOOK AN ENTERPRISE REVIEW**

therealgrowthcollective.com

IMPORTANT

Educational decision tool only. This guide is not an official Real program, brokerage, legal, tax, financial, employment, compliance, or compensation document. Program terms, policies, fees, eligibility, payments, and processes change. Verify current information with The Real Brokerage, Inc., the applicable responsible broker, onboarding or teams contact, and your own advisors. Real Growth Collective is independently led and is not an official program of The Real Brokerage, Inc. No income, production, recruiting, ownership, approval, savings, migration, or business result is promised or guaranteed.