

THE ULTIMATE REAL ESTATE PLAYBOOK: SYSTEMS THAT WORK

# Right People, Right Roles, Better Goals

Changing Your High-Level Strategy to Facilitate Efficiency

**Lisa  
Chinatti**

 Chinatti Realty

 @chinattirealty



# At a GLANCE

When you run a business the size of Lisa Chinatti's, it's easy for things to get out of hand. But when communication and internal disconnect begin to affect your quality of service to your clients, it's time to do a deep audit and align your systems. Lisa Chinatti shows how aligning your team with your goals can bring departments together and streamline efficiency.



**Boston,  
Massachusetts**

PRIMARY MARKET



**\$655k**

AVERAGE PRICE POINT



**10**

YEARS IN REAL ESTATE

## 2022 PRODUCTION STATS

**828**

TRANSACTIONS

**\$438,385,000**

SALES VOLUME

**\$9,460,000**

GCI

### CORE CLIENTELE

✓ **Wide range**

### PRODUCTION

**75% | 25%**

Buyers | Sellers

### TEAM STRUCTURE

✓ **103 agents**  
✓ **17 staff members**

# Lisa ON COACHING



The biggest benefit is accountability, right? Really, all it comes down to is accountability. Having somebody who can help me think bigger and not fall into my own glass ceiling and thinking that it should be this way or it has to be this way or just because somebody else did it this way, that I have to have the same result. And the camaraderie. My besties are all people that I've met through coaching.



## BY THE NUMBERS

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**6**

Departments represented

**75+**

Metrics monitored across the entire operation

**12**

Marketing specific metrics monitored

**19**

Operations specific metrics monitored

**16**

Hours per quarter committed to EOS management

**\$300**

Financial commitment a month





## THE STORY

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It was 2021, and Chinatti Realty was on fire. But with transactions reaching nearly 1,000 units, the intensity of activity was bringing to light and exacerbating underlying inefficiencies. There were breaks and service gaps across all areas of operation, agent turnover was rising, and management was in no position to address the problems because of dysfunctional internal communication. And it wasn't just an internal problem. Customer experience was affected and complaints were mounting.

Things worsened in 2022. Processes and systems were consistently breaking down, and maintaining a smooth workflow seemed impossible. Conversion became particularly troublesome, as the team found themselves constantly firefighting instead of working towards shared goals. It felt like nobody was rowing in the same direction. Sales were declining and the connection was obvious.

In an effort to improve the team and steer the company in the right direction, Lisa initiated a process of assessment and alignment. She did this by using the Entrepreneur Operations Systems (EOS) framework.

The process began in March 2022, with a focus on evaluating the leadership team and ensuring that the right individuals were occupying suitable positions for the right reasons. As she started implementing these changes, some individuals voluntarily left the organization while others were transitioned out.

EOS has been especially helpful in establishing, tracking, and analyzing metrics more effectively. In the early stages of restructuring, it was especially helpful that Lisa could see everyone's activities. This gave her a clear understanding of what was happening throughout the organization. Transparency became front and center, so Lisa could address issues promptly and ensure that everyone was aligned and working towards shared objectives.

The EOS framework proved to be a transformative solution. Lisa now has her business under control, and effective systems and processes have resulted in ever increasing efficiency – and, most importantly, sales.



## THE STRATEGY

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### **ALIGN SHORT-TERM AND LONG-TERM GOALS**

- Collectively generate a comprehensive list of objectives, starting from the larger milestones and breaking them down into smaller, actionable steps.
- For Lisa's team, the primary objective was to get everyone on the same page regarding goals, expectations, and the overall direction of the company. To reinforce this alignment, the goals and their progress were displayed on TVs strategically placed throughout the office, ensuring transparency and visibility for all team members.

### **ESTABLISH METRICS TO IMPROVE**

- Though now over 75 metrics are tracked and measured, the team started with the foundational metrics for each department



## THE STRATEGY

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### EXAMPLES OF EARLY METRICS

- Inside sales:
  - dials
  - hours in conversation
  - appointments booked
- Operations:
  - % of listings fully complete 24 hours before being posted in MLS
  - % of loops fully compliant within 48 hours of an accepted offer
- Finance:
  - accuracy of the commission statements
- Staff happiness
- Agent happiness
- Marketing
  - email click and open rates
  - # of customer reviews added to Google profile
  - new followers on social accounts
  - average time spent viewing YouTube videos
- Recruiting
  - appointments set
  - appointments met
  - agents onboarded
- Agent databases metrics
  - % of company generated leads being handled appropriately according to the company standards



## THE STRATEGY

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### TRACK PROGRESS

- Implement ninety.io, specifically designed to support the Entrepreneur Operations Systems (EOS) framework. With ninety.io, Lisa can systematically track progress, share updates, and stay accountable to goals. It serves as a hub for collaboration and communication, and it provides assessment, alignment, and tracking strategies.
- Conduct tracking on a rolling 13-week basis. Lisa can test and track various activities and identify areas for process improvement. By conducting A/B tests, they can quickly determine which strategies yield positive outcomes and which ones hinder business growth.
- Staff members report data on a weekly basis.

### SET QUARTERLY GOALS

Just as you need standardized processes for working with home buyers and sellers, you need processes for working with other agents.

- Communication
  - Find out from the agent you are working with how they like to communicate. What are the key events and how often?
  - With a buyer, there are a maximum of three communication touchpoints:
    - Initial buyer consultation
    - Under contract
    - Closing

Through their comprehensive tracking, goal-setting, and alignment of compensation plans, Lisa and her team are able to optimize their operations, improve communication, and foster a culture of accountability, thus helping them achieve their goals.



# Lisa's 3 Action Items FOR SUCCESS

1

Immerse yourself in better business systems. A good start is reading the book "Traction" by Gino Wickman.

2

Determine if you have the ability to track data. If you don't, figure out how you can.

3

Schedule time to make implementing this framework a priority.

# 6 Things Lisa Will Do **MOVING FORWARD**

**1**

Continue to learn how to do high-level management better.

**2**

Learning how to have better conversations and be more aware.

**3**

Continue to improve how she sets smarter goals.

**4**

Learning new ways to implement cross-department challenges and collaboration.

**5**

Develop new ways to get agents to work within the EOS framework.

**6**

Work with her Tom Ferry coach to help keep her accountable and implement these ideas!

# Lisa's TOOLKIT



FIND THE BELOW TOOLKIT ITEMS IN **illūm**

## Data Scorecard for Marketing

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The employee review template that ties in core values and the EOS "People Analyzer" utilized by Chinatti Realty.

## 90 Responsibilities Chart

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Overview of the distribution of responsibilities at Chinatti Realty.

## Data Scorecard For Operations

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Example of the Operations department data scorecard.

## Data Scorecard for Marketing

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Example of the Marketing department data scorecard.