Appendix E: The Next 90 Days (Post-Onboarding Growth)

This is the framework Mason returned to after completing his initial ramp-up — the guide that helped him understand why growth after the foundation phase should feel steadier, not heavier.

Purpose

The first 90 days are about building the foundation. This phase is about trusting it. The goal of the next 90 days is not acceleration for acceleration's sake — it is sustainable, repeatable growth built on systems that are already in place. Agents who skip this phase and push too hard too fast often rebuild the same problems at higher volume.

Primary Focus Areas

During this phase, the shift is from building systems to refining them. The work looks less dramatic than the first 90 days. That is intentional.

- Deepen sphere relationships through consistent, low-pressure contact
- Increase listing confidence through repetition and preparation
- Expand price point intentionally, not reactively
- Protect time aggressively as demand increases
- Review metrics monthly and adjust based on data, not emotion

This phase emphasizes quality over quantity and consistency over intensity.

What This Phase Looks Like in Practice

Agents who are progressing well through this phase will begin to notice changes that are subtle but significant. The work starts to feel less like effort and more like rhythm.

Indicators of healthy progression:

- Less emotional reaction to market shifts
- Stronger confidence in consultations — both buyer and seller
- More predictable pipeline flow, with fewer surprises
- Earlier recognition of capacity limits before they become problems
- Referral conversations happening naturally, without manufactured urgency

Growth should feel steadier, not heavier. If it feels heavier, something in the system needs attention before adding volume.

Quarterly Rhythm

Structure beyond 90 days requires a rhythm that holds even when the market is loud or unpredictable. Use this framework as a repeating cycle:

- **Monthly:** Metric review and one intentional adjustment
- **Quarterly:** Full CRM cleanup and re-tagging; identify stale contacts and renew relationship momentum
- **Quarterly:** Relationship-first marketing refinement — evaluate what is reaching people and what is noise
- **Quarterly:** Strategic planning for the upcoming season — review goals, capacity, and what the business needs next

Leader Coaching Prompts

Use these in weekly or bi-weekly conversations with agents in this growth phase:

- Where has this agent improved consistency since completing onboarding?
- Which systems are holding up under increased volume — and which are starting to show cracks?
- Where is friction beginning to appear? Is it a system problem or a behavior problem?
- What should be refined in the current approach rather than replaced entirely?

Success Marker

At the end of this phase, the agent is operating from a different posture than they were 90 days prior. The measure is not production volume — it is professional steadiness.

An agent who has completed this phase successfully:

- Maintains consistent activity without burning out
- Uses systems instinctively rather than consciously
- Adjusts calmly when the market shifts instead of reacting emotionally
- Is prepared — and willing — to expand intentionally

The foundation was built in the first 90 days. This phase proves it holds weight.