

Turning fragmented reporting into focused coaching for 70 teams

National real estate marketplace | 15-month engagement | AI-supported performance analysis and coaching

ENGAGEMENT AT A GLANCE

70

teams across 14 states and two regions

Weekly

actions informed by team and agent performance

Reusable

analysis tools designed for other advisors to adopt

The challenge: More reporting than an advisor could act on

A national marketplace supported real estate teams with different staffing models, lead pipelines, performance levels, and willingness to engage.

The information needed to coach them lived across multiple reports. Reviewing every funnel manually each week was impractical. Generic recommendations offered little direction for teams facing different problems.

The challenge was to make coaching specific enough to matter and efficient enough to repeat across the entire portfolio.

The work: Use AI to prepare the analysis and keep coaching human

The engagement connected performance reporting to a weekly coaching process:

Consolidated analysis

Built an AI command center that brought reporting together to identify performance gaps and opportunities at team and agent level.

Funnel visibility

Created a reporting app tracking progression from leads to appointments to closings.

Weekly priorities

Translated the analysis into concise action emails tailored to each team's funnel.

Leadership conversations

Conducted strategic business reviews covering staffing, inside sales models, agent accountability, and market expansion.

Repeatable delivery

Developed a reusable prompt engine so other advisors could recreate the analysis using their own data and AI tools.

The system helped advisors prepare for conversations with a clearer view of where attention was needed.

The outcome: A repeatable connection between data and action

The approach made it possible to support 70 teams with recommendations grounded in their own performance.

Reporting helped prioritize coaching time. Weekly actions gave team leaders concrete next steps. Business reviews connected those actions to broader decisions about people, capacity, and growth.

Across the teams coached, combined GCI exceeded \$560M, with approximately 1,500 transactions closed. These figures describe the teams' aggregate business activity, rather than incremental revenue attributed to the coaching system.

The reusable prompts also gave other advisors a way to apply the approach to their own portfolios.

Your reports should lead to decisions.

Goshen Consulting helps organizations connect performance data, AI-supported analysis, and practical coaching so leaders know where to focus next.

Book an introductory call: calendly.com/goshenconsultinggroup/introductioncall

This case study reflects operating and advisory experience gained by Goshen Consulting's founder in a prior role.