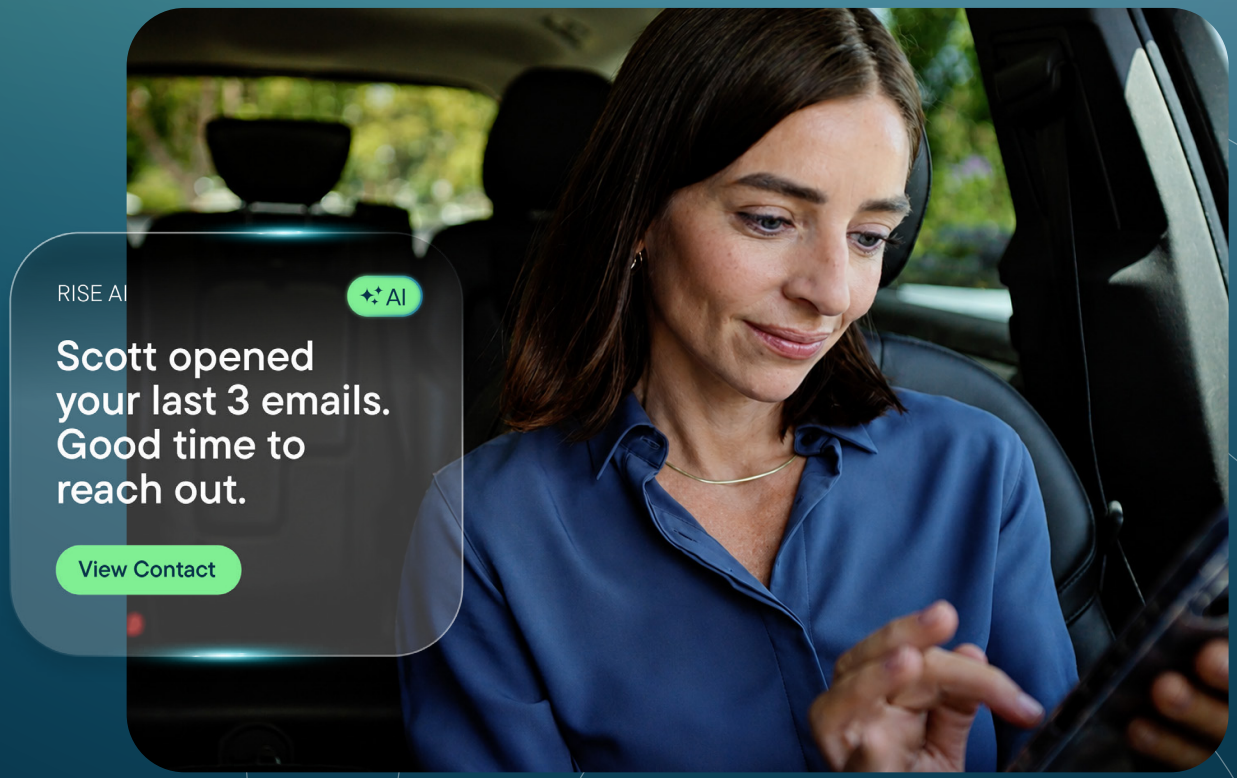
Don’t Miss the Moments

2027 Brokerage Playbook

Turn your database into a growth engine



MoxiWorks

Every missed moment is a missed deal.

A practical blueprint for broker-owners: find the moments already inside your database, help agents act on them, and measure what it does for production.

01 · The 2027 mandate

Capture more of what you already have

Brokerages are heading into 2027 with more technology, more data and more AI than ever.
But more tools don't automatically create more conversations, more appointments or more closed business.

Your brokerage doesn't have an opportunity problem. It has an attention problem.

The deals you lose to other brokerages are often already in your agents' databases: past clients, sphere, active buyers, homeowners thinking about a move. The brokerages that win in 2027 will build a system that turns those signals into timely human action.



02 · The framework

The Missed Moments growth model

A database becomes a growth engine when five things happen consistently. Think of it as the operating system for relationship-driven growth.

1. Find	Detect meaningful client and market signals, instead of waiting for agents to remember who needs attention.
2. Prioritize	Rank the relationships that matter today so agents know where to focus first.
3. Prompt	Give the agent a clear reason to reach out and a recommended next step.
4. Connect	Let the technology disappear into a timely, relevant human conversation.
5. Measure	Track what creates appointments, listings, repeat and referral business, then improve the system.

03 · Why this matters now

Past clients are your brokerage's best source of repeat business.

Yet most of them end up working with a different agent. Here's what the data says.

Most clients say they'd work with their agent again. But when it's time to buy or sell, many hire someone else.

97%

of brokerage leaders say their agents use AI. Adoption is no longer the question; outcomes are.

Source: Delta Media Group, 2026 Real Estate Leadership Survey, reported by Inman, Jan. 29, 2026

79% → 13%

of repeat buyers would consider using the same agent again, yet only 13% hired their agent based on that past experience.

Source: Zillow, 2025 Consumer Housing Trends Report for Agents, Dec. 30, 2025

47% / 59%

of buyers and sellers hired the first agent they spoke with. Being first is often the whole game.

Source: Zillow, 2025 Consumer Housing Trends Report for Agents, Dec. 30, 2025

49%

of sellers used a different agent to buy their next home than the one who sold their current home.

Source: NAR, 2025 Profile of Home Buyers and Sellers, Nov. 4, 2025 (51% used the same agent)

What it means for broker-owners

Consumers still value agents, and most brokerages have the data. But a lot of business is lost between "I'd use my agent again" and the moment a client decides who to call. Whoever reaches them first usually wins. That gap is where your 2027 growth is hiding.

04 · Where deals get missed

Three moments every brokerage misses

These happen in every brokerage, every week. Miss any one of them and the deal goes somewhere else.

Moment 1

They came back

A past client starts browsing again after months of quiet.

They open a market update, revisit listings or check what their home is worth. Your database sees it. The question is whether the agent does, before another brokerage earns the conversation.

Ask your team: *When a past client starts looking again, how long before their agent knows?*

Moment 2

Who gets the call

An agent has 150 contacts. One of them is ready to move.

Agents can't treat every contact as equally urgent. The system should show which relationships are heating up, and explain why that person belongs at the top of today's list.

Ask your team: *If you asked five agents who their most important call is today, could they answer, and say why?*

Moment 3

The right listing

A home that matches a client's search hits the market this morning.

The alert isn't the value. The value is the right agent reaching the right client, with context, while the listing is still fresh: a reason to reconnect.

Ask your team: *Does your agent hear about it before the client sees it somewhere else?*

05 · The 2027 shift

From tech stack to growth system

Use this to pressure-test whether your 2027 plan is still built around tools, or around outcomes.

Old model	2027 model
More tools	Fewer, better-connected workflows
Generic, calendar-based nurture	Outreach triggered by what the client is doing
AI as a copywriting shortcut	AI that tells agents who, why and what next
Activity metrics: opens, clicks, logins	Appointments, listings, repeat and referral business, revenue
“Did agents log in?”	“Did the platform help agents win the deal?”

06 · Evaluate

The 2027 technology test

Before you renew, add or replace technology, ask these five questions. A “no” doesn’t always mean cut the tool, but it should start a conversation about the value it creates.

1. Does it surface moments on its own, or wait for an agent to search?
2. Does it tell the agent who needs attention, and why?
3. Does it connect to the tools agents use to win the deal: presentations, CMAs and email?
4. Can leadership measure the business outcome it influences?
5. Would an agent see it as a reason to join, or stay with, our brokerage?

07 · Back to basics

AI finds the moment. The fundamentals win the deal.

Catching the moment is half the job. When the agent reaches out, they need to show up ready. In 2027, the most valuable AI won't replace the fundamentals agents already rely on. It will point them at the right person, at the right time, with those fundamentals ready to go.

The listing presentation

A seller is ready to talk.

The agent who arrives with a branded, data-backed presentation looks like the obvious choice. The one who scrambles to build it looks like everyone else.

The CMA

A homeowner wonders what their home is worth.

With most sellers hiring the first agent they speak with, the first credible answer usually wins the listing conversation.

Email marketing

A past client has gone quiet.

Consistent, relevant email keeps the agent top of mind, so when that client is ready, they come back to their agent instead of searching online.

Broker takeaway: judge your AI by whether it connects to presentations, CMAs and email, not by whether it can write a social caption.

08 · Activate

A 90-day activation blueprint

Don’t turn database activation into a year-long transformation project. Prove the model in one quarter, measure it and scale what works.

Days 1–30

Connect and benchmark

- Identify your priority databases, systems and data sources.
- Pick 3–5 high-value client signals to start with.
- Baseline adoption, response rates, repeat and referral business, and current pipeline.
- Choose a pilot group across production levels.

Days 31–60

Activate and coach

- Launch daily prioritized contacts for the pilot group.
- Pair every signal with a reason and a next action.
- Coach agents to turn a signal into a conversation, not a scripted blast.
- Remove workflow friction fast. Every extra click matters.

Days 61–90

Optimize and scale

- Compare surfaced moments to actions, appointments and listings.
- Find the signals producing the strongest response.
- Build repeatable plays around the winning moments.
- Expand to the next cohort, using pilot results as proof.

09 · Measure

Measure what matters

Metric	What it tells you
Agent action rate	What share of surfaced moments get timely agent action?
Time to action	How quickly does an agent respond after a meaningful signal appears?
Appointment rate	How many surfaced moments become CMAs, listing presentations or buyer consultations?
Influenced pipeline and revenue	How much business can be tied back to surfaced moments and follow-up?

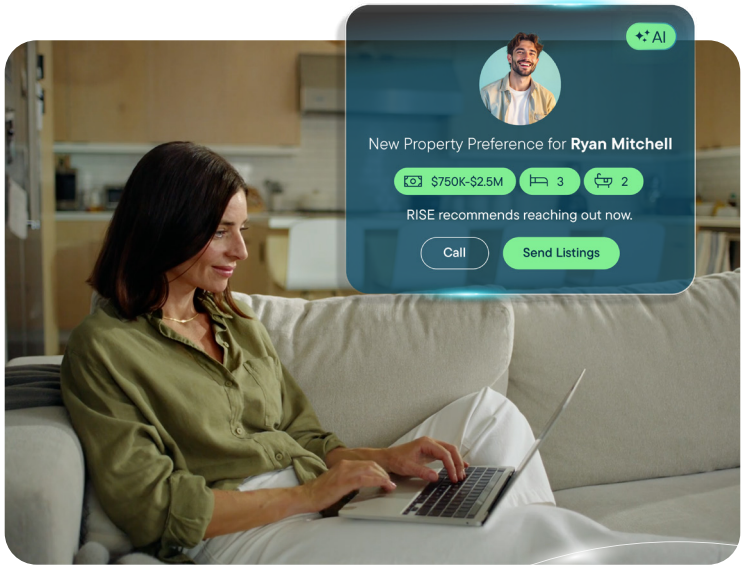
Where RISE by MoxiWorks fits

This playbook is bigger than any one product. But the model it describes is exactly why we built RISE: to help brokerages turn the relationships already in their database into deals.

Don’t Miss the Moments with RISE

RISE’s AI catches the moment. Your agents win the deal.

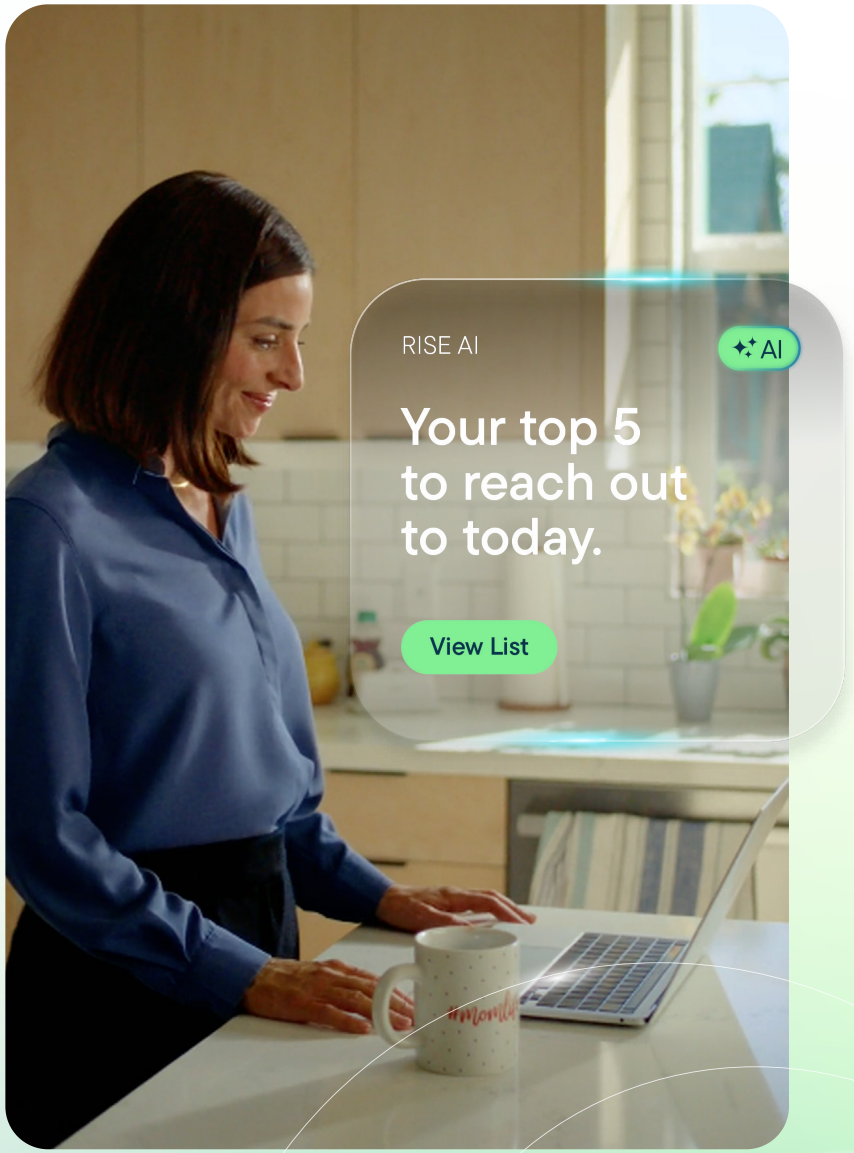
RISE helps your agents know which contacts need their attention, why it matters now and what to do next, so they catch the deals already in your database and have every reason to stay.



There’s a Sophia in every brokerage

She’s one of your best agents. A full pipeline, a full life, and no time to spot which past client is about to make a move. So the moments slip by: the check-in that never happens, the seller who calls someone else.

RISE surfaces those moments for her, so she catches the deal without working longer hours. Now imagine that across your entire roster.



MoxiWorks

From moment to deal, in one place

Presentations. RISE flags the seller who's ready to talk, and your agent shows up with a branded listing presentation.

CMAs. RISE spots the homeowner thinking about selling, and your agent answers "what's my home worth?" with a credible CMA, first.

Email marketing. RISE knows who's gone quiet, and automated, branded email keeps your agent top of mind so past clients don't list elsewhere.

See what catching these moments looks like for your agents.

Book a Demo

Sources

Delta Media Group, 2026 Real Estate Leadership Survey, as reported by Inman, "So pretty much everyone in real estate is using AI now," Jan. 29, 2026.

Zillow, 2025 Consumer Housing Trends Report for Agents, press release "Online research now shapes how most agent relationships begin," Dec. 30, 2025.

National Association of REALTORS®, 2025 Profile of Home Buyers and Sellers, Nov. 4, 2025.

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