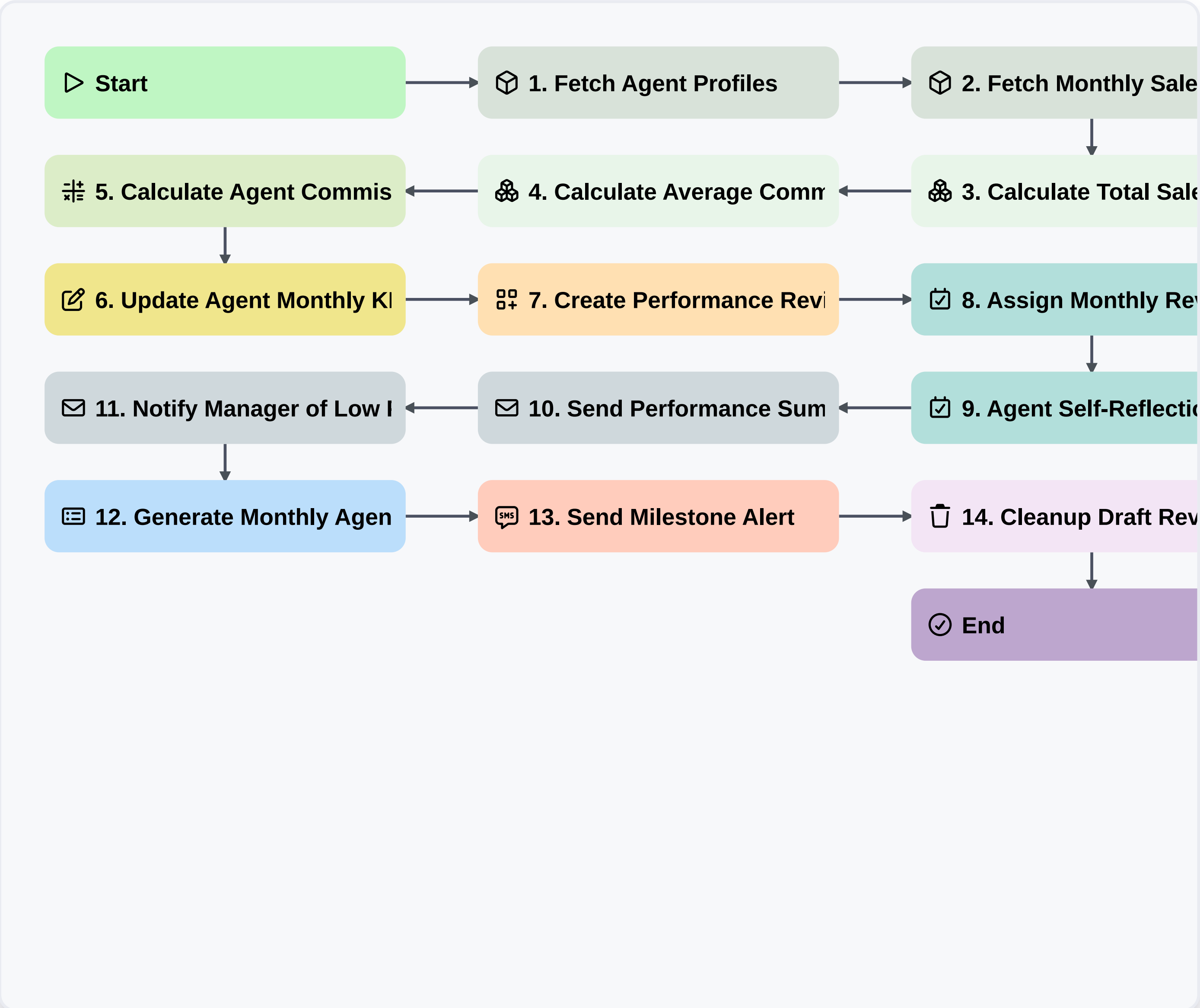
ChecklistGuro

Real Estate Agent Performance Tracking Process



Start
Start of the Workflow/Process.

1. Fetch Agent Profiles
Retrieve all active agents and their associated performance metrics from the Agent Data Model.

2. Fetch Monthly Sales Data
Retrieve all completed property sale entries for the current month.

3. Calculate Total Sales Volume
Sum the 'Sale Price' property from all completed sales entries to get total revenue.

4. Calculate Average Commission Rate
Calculate the average value of the 'Commission %' field from the monthly sales entries.

5. Calculate Agent Commission Earned
Multiply the Total Sales Volume by the Agent's specific commission percentage.

6. Update Agent Monthly KPI
Update the 'Monthly Revenue' and 'Units Sold' fields in the Agent's Data Model record.

7. Create Performance Review Record
Create a new entry in the 'Performance Reviews' data model for the monthly summary.

8. Assign Monthly Review Task
Create a task for the Sales Manager to review the calculated KPIs and approve the monthly summary.

9. Agent Self-Reflection Task
Create a task for the specific Agent to complete their monthly self-assessment checklist.

10. Send Performance Summary to Agent
Send an automated email to the agent containing their monthly sales totals and commission earned.

11. Notify Manager of Low Performance
Send an email to the Sales Manager if the aggregate sales volume falls below the predefined threshold.

12. Generate Monthly Agency Dashboard
Generate a comprehensive visual report summarizing all agents' performance for the agency leadership.

13. Send Milestone Alert
Send an SMS to the agent when a high-value sale (e.g., > $1M) is recorded in the system.

14. Cleanup Draft Reviews
Delete any incomplete or expired performance review entries from the previous month.

End
End of the Workflow/Process.