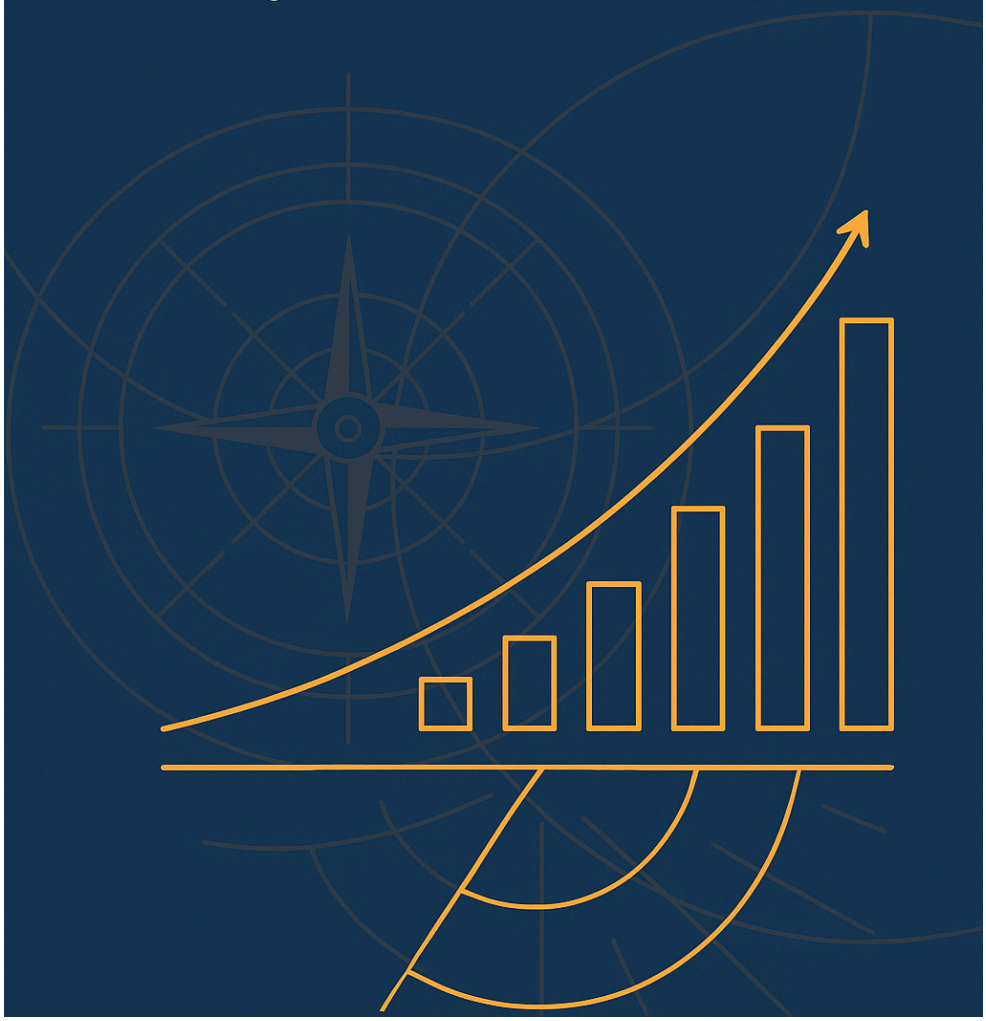
2025 Agent Playbook

Insights from the 4W Survey



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4W Strategic Consulting

2025 Agent Playbook: Insights from the 4W Survey

Introduction

The real estate industry is in constant motion — shaped by market forces, consumer sentiment, and the adaptability of agents on the ground. To capture what's really happening at the front lines, we conducted the **4W Survey**: 46 structured conversations with agents across residential, commercial, and new construction roles between **August 18–29, 2025 in the Raleigh NC Triangle Market**.

Participation funnel:

- **675 agents called**
- **211 answered the phone (31%)**
- **46 engaged with the survey (7% of total called)**
- **24 returned missed calls with partial responses**

This participation data underscores two truths:

1. **Reaching agents takes persistence** (only ~1 in 3 answered). Approx 70% Did not answer the phone.
2. **When engaged, agents are candid** (nearly 1 in 5 who answered shared substantive insights).

The **4W Survey** asked 46 agents four simple but powerful questions:

- What's working?
- What's getting in the way?
- Who's in your corner?
- What's your two-year vision?

Their candid answers reveal not just what's happening in the market, but also what separates agents who are adapting and growing from those who are struggling. This Playbook translates those insights into **tactical takeaways** you can apply directly to your business.

What's Working Right Now — and How You Can Double Down

- **Referrals & Sphere of Influence (~17%)**: Many agents said business is still coming from their relationships — but most admitted they don't have a system.
    - *Tactic:* Build a **simple touchpoint plan** (calls, notes, social check-ins) and track it in a CRM. Relationships aren't just luck; they're built.
- **Open Houses (~9%)**: Still a proven way to meet buyers and sellers face-to-face.
    - *Tactic:* Make every open house a **lead capture event** — sign-ins, follow-up calls, short video recaps.
- **Consistency Wins**: A few agents credited steady routines (scripts, video content, community presence).
    - *Tactic:* Pick **one channel** (video, farming, scripts) and commit to it for 90 days before switching gears.

What's Getting in the Way — and How to Break Through

- **Time Management (41%)**: The #1 barrier. Most agents are busy, but not always productive.
    - *Tactic:* Use a **time-blocking system**: mornings for lead gen, afternoons for appointments, evenings for admin/follow-up.
- **Market Conditions (18%)**: Rates, affordability, and uncertainty are slowing buyers — but they don't have to stop your pipeline.
    - *Tactic:* Educate buyers with options: rate buydowns, concessions, and the "refi later" strategy. Become the one who makes the market navigable.
- **Other Barriers (41%)**: Burnout, lack of systems, follow-up gaps.
    - *Tactic:* Automate what you can (email drips, reminders), and delegate what you can't (admin/TC).

Who's in Your Corner — and How to Strengthen Your Support

- Agents leaned on **family (9%)**, **broker/team (9%)**, or **mentors (7%)**. But many also said *"nobody"* or *"just me."*
- Working without support can stall growth and amplify stress.
    - *Tactic:* If your brokerage isn't providing coaching/accountability, **find it elsewhere**. Outside coaches, peer groups, or even accountability partners can fill the gap.

Your 2-Year Vision — Turning Ideas Into Goals

- Most agents described **broad aspirations** (growth, balance, stability).
- A smaller group (<15%) set **specific numeric goals** (units, GCI, volume).
    - *Tactic:* Follow the lead of the goal-setters. Set **measurable benchmarks** (e.g., 24 units/year or $250k GCI). Break them into quarterly and weekly targets.

Quick Wins You Can Implement This Month

1. Write down your **2-year numeric target** (units or GCI).
2. Build a **touchpoint plan** for your top 25 sphere contacts.
3. Host **one open house** and treat it like a marketing event.
4. Block your calendar for **daily lead gen time** (non-negotiable).
5. Identify **one gap** in your support (admin, coaching, accountability) and take action to fill it.

Conclusion

The difference between agents who are treading water and those who are building momentum isn't luck — it's structure. Referrals aren't just about waiting for the phone to ring; they're about consistent touches. Market headwinds are real, but so are solutions. Support may be uneven, but you can build your own scaffolding.

The Playbook takeaway: **Add structure to what's already working, and you'll multiply your results.**

Turn Insight into Alignment: Create Your 2-Year Vision

You've read what's working. You've seen where agents are stuck. Now it's time to apply it to *your* business, *your* goals, and *your* life.

We created a simple, high-impact worksheet to help you clarify your next two years — built around the 4W Framework:
Who you are. What you need. Where you thrive. Why it matters.

This isn't busywork. It's how agents start creating momentum with intention — instead of chasing what's loud.

-Define your income targets
-Clarify your ideal clients
-Align your time with your values
-Get clear on what *you* actually want

👉 **Click here to access the Vision Worksheet**
(It's free and built for where you are now.)

About This Report

The **4W Survey** is part of our commitment to understanding the realities agents face day-to-day. We believe that listening directly to practitioners — not just market data — reveals the real story of where the industry is and where it's headed.

Between **August 18–29, 2025**, 675 agents were contacted, 211 answered, and 46 shared candid responses to the 4W questions. Their feedback, combined with Triangle MLS and national mortgage context, creates a snapshot of both challenges and opportunities in today's market.

As part of our work in **supporting and placing agents in the right environments**, we see listening as essential. This survey is not about selling, but about surfacing insights that can help agents, teams, and brokerages make better decisions about growth, support, and long-term success.

For additional insights, placement opportunities, or resources:

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Local Market Context (Triangle MLS – Entire MLS)

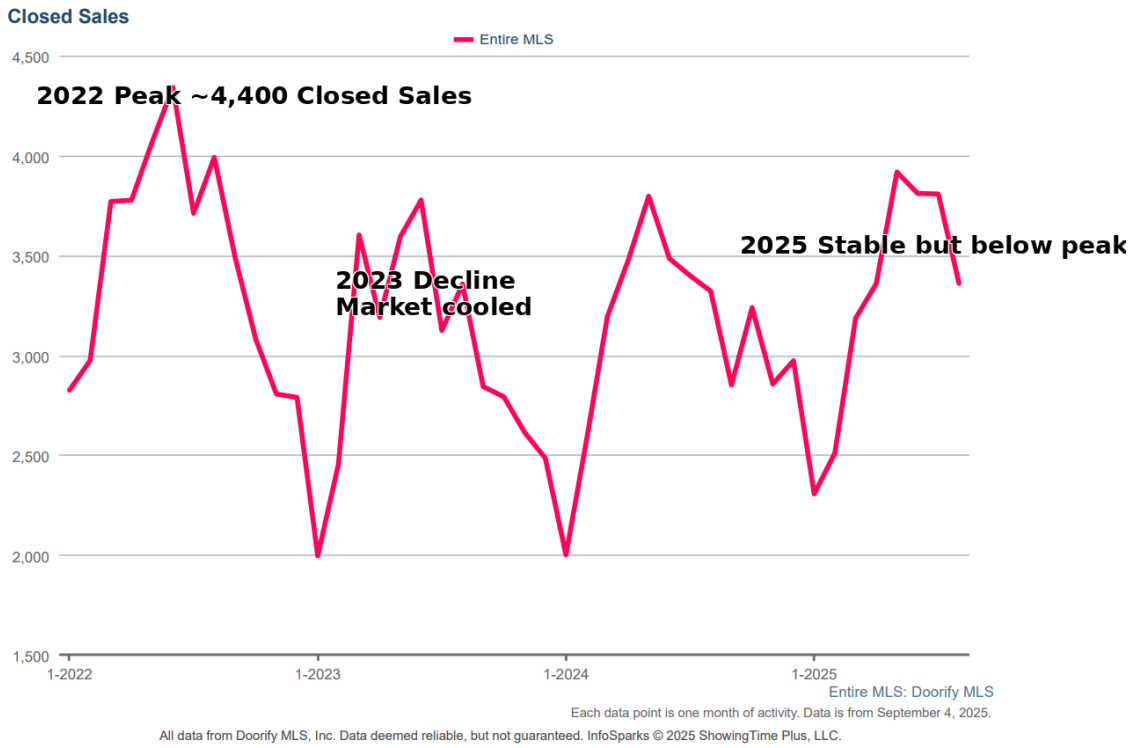
Data through Aug 2025 (YoY vs Aug 2024)
Source: Triangle MLS / InfoSparks (10K Research / ShowingTime Plus)

Metric (TMLS)	Aug 2025	Aug 2024	Change
Dollar Volume (Closed Sales)	$1.66B	$1.61B	**+2.7%**
Closed Sales (units)	3,279	3,320	**−1.2%**
Under Contract (units)	3,590	2,975	**+20.7%**
Homes for Sale (inventory)	11,534	8,698	**+32.6%**
Months Supply	3.5	2.9	**+20.7%**
Median Days on Market	9	5	**+80.0%**
Median % of Original Price	97.3%	99.1%	**−1.8 pp**

Interpretation:

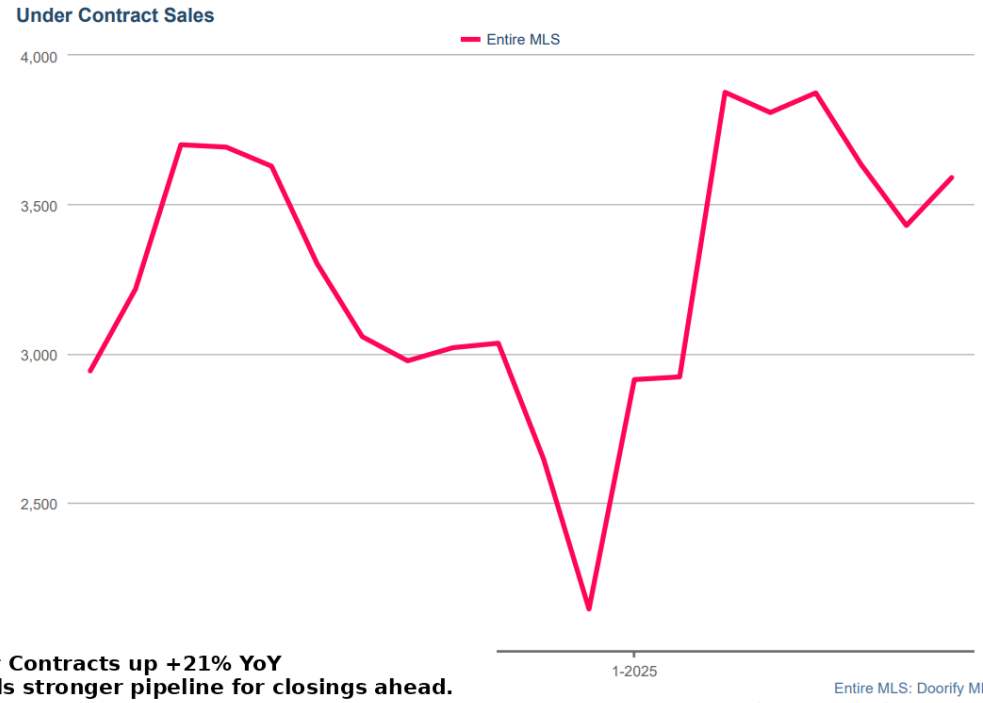
- **Inventory up sharply** (+33%) and **months supply at 3.5** → the market is **less tight** than 2024 (though still shy of the ~4–6 months often cited as “balanced”).
- **Pricing power has eased**: sellers received **97.3% of original list** (down 1.8 percentage points YoY).
- **Homes take longer to sell**: **DOM up to 9** days from 5 (still brisk by historic standards).
- **Closings are roughly flat** YoY (−1.2%), but **under contracts are up 20.7%**, which often signals **near-term improvement in closed sales**.
- **Dollar volume is up 2.7%** despite flat unit sales, implying **mix and/or price effects** supporting volume.

3-Year Closed Sales Trend (Entire MLS)



Closed sales peaked in 2022 at ~4,400 monthly units, fell sharply through 2023–2024 as higher mortgage rates slowed activity, and in 2025 have stabilized — but still remain well below the 2022 high-water mark. This context shows that today's "flat" year-over-year performance masks a **market still recovering from a two-year cooling cycle**.

Chart 1: Under Contract Sales (YoY)

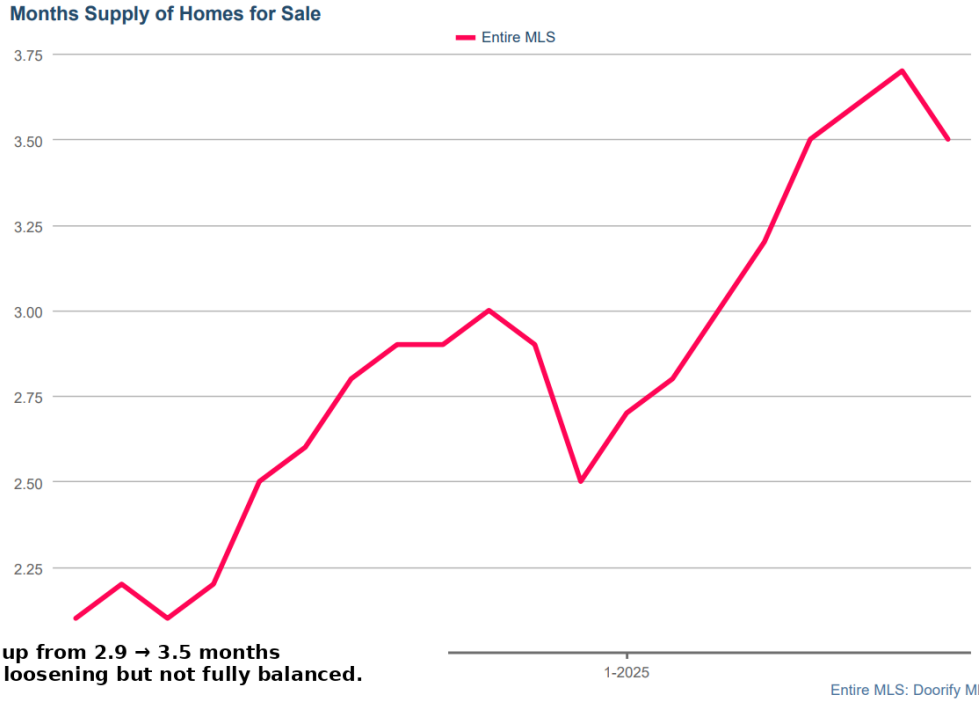


Under Contracts up +21% YoY
Signals stronger pipeline for closings ahead.

Entire MLS: Doorify MLS

Each data point is one month of activity. Data is from September 2, 2025.

Chart 2: Months Supply of Homes (YoY)



Supply up from 2.9 → 3.5 months
Market loosening but not fully balanced.

Entire MLS: Doorify MLS

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Chart 3: Median Days on Market (YoY)

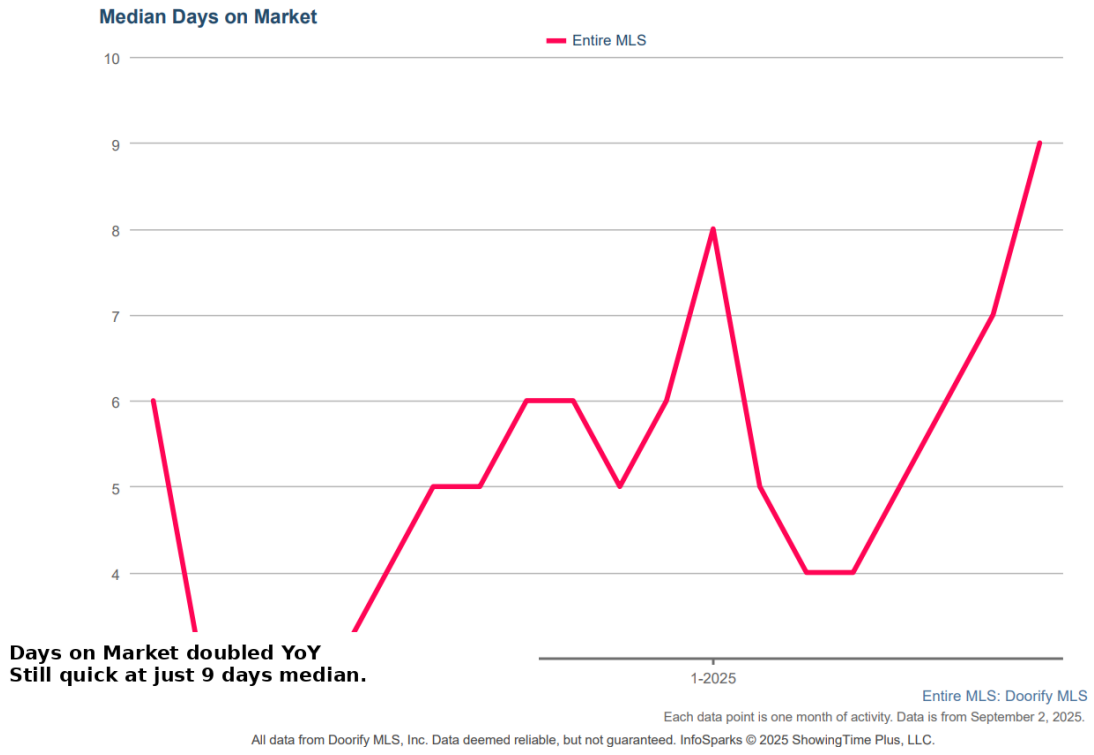


Chart 4: Homes for Sale (YoY)

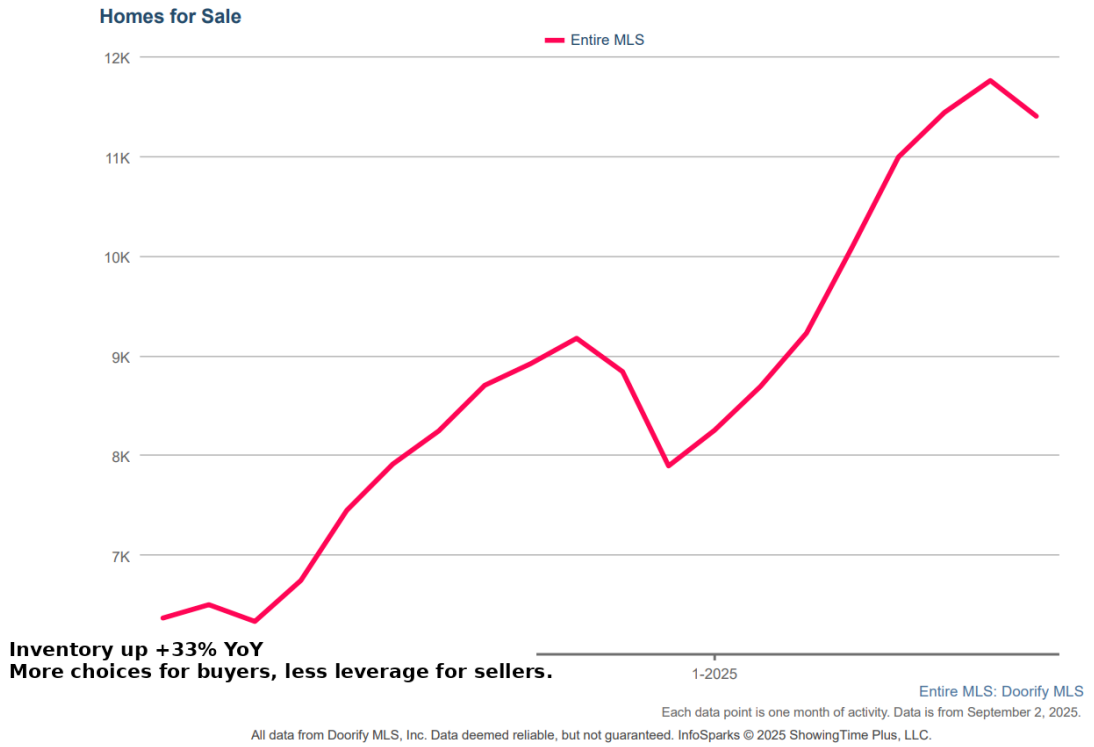


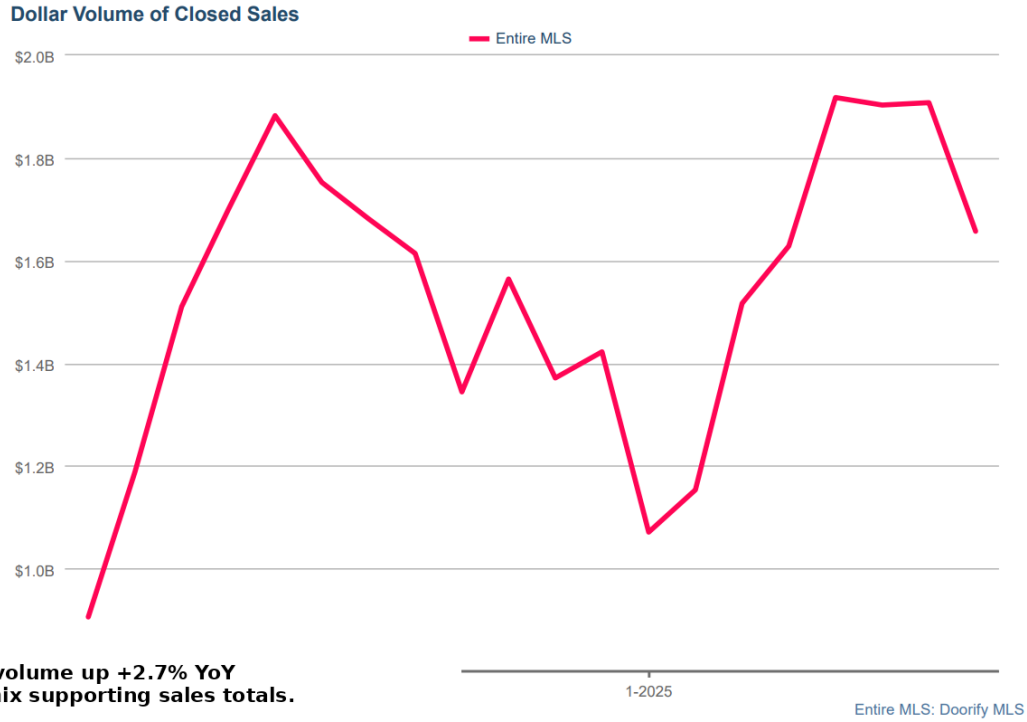
Chart 5: Median % of Original Price (YoY)

Median sale-to-list ratio dipped 97.3% vs 99.1% last year.

Entire MLS: Doorify MLS

Each data point is one month of activity. Data is from September 2, 2025.

Chart 6: Closed Sales (YoY)



Dollar volume up +2.7% YoY
Price mix supporting sales totals.

Entire MLS: Doorify MLS

Each data point is one month of activity. Data is from September 2, 2025.