NSBAR

2026 - 2027 Profitable Future Planning

Prepared by:

WAV Group

2026 to 2027 Profitable Future Planning Report

WAV Group facilitated the NSBAR Profitable Future Planning session on Monday, January 22, 2026. Prior to the session WAV Group conducted a Member Engagement and Satisfaction Survey and conducted interviews with the Executive Committee, Brokers along with several discussions with the Staff.

Company Mission

The participants reinforced the on-going relevance of the company's mission:

Cultivating a dynamic and agile real estate community by delivering robust resources & opportunities for growth, one Member at a time.

The discussion centered around ways to evolve the organization to align with this important focus.

Operating Principles

The discussion centered around several operating principles for the company to be driven by moving forward.

Get rid of Outdated, Immeasurable Strategic Plans

- Get rid of strategic plans with lofty goals and no specific deliverables or key performance indicators to measure it by
- Get rid of goals that have been very difficult, if not impossible to achieve
- Pursue meaningful ways to generate revenue and relevance

Ensuring Long-Term Viability of Organization

- Deliver Pain Killers not Vitamins
- Deliver Services that ***MATTER***
- Help Brokers and Brokerages ***Succeed***
- Create a proactive ***business-friendly*** environment
- Create meaningful differentiation_from competitive Associations

Stop Focusing on Ineffective and Irrelevant Programs

Objectively evaluate perceived value of programs offered today and discontinue the "nice to haves". Do not be afraid to kill off the sacred cows if they are no longer relevant. Critically evaluate attendance and satisfaction of events, education, reports, and workflows that do not help drive home ways to help members be more successful.

Five-Year Vision

In five years, NSBAR will be viewed as an organization solely focused on delivering meaningful programming proven to help members be more successful.

Capitalize on Shorter Term Opportunities – Rework Schedule for Goals 2 to 5

Take full advantage of revenue opportunities that have recently emerged. Move back timing and prioritization of Goals 2 to 5 to 2027 and beyond to make room for a focus on the shorter-term revenue growth opportunities.

Strategic Goals, Action Items and Key Performance Indicators

After a lengthy discussion of industry trends, member satisfaction survey results and interview discussion outcomes, the NSBAR leadership team outlined 5 strategic goals.

1. Fully leverage incremental revenue opportunities to fuel member initiatives

Leverage revenue opportunities with Association mergers, MRED growth opportunities that have arisen in just the past few weeks. Prioritize these opportunistic ways to make NSBAR more profitable, relevant and impactful for its members.

2. Help increase broker productivity and industry longevity

Launch initiatives and education that help brokers stay in the business longer and become more productive while helping to increase brokerage profitability.

3. Help managing brokers improve brokerage profitability

Support managing brokers to better support their operations to improve profitability and better service broker success and stay in business

4. Free up resources for higher level support for staff, managing brokers and brokerage staff by delivering 24/7 AI support

Deliver 24/7 support by fully leveraging AI, tech and tools to drive home 24/7, 365 support available – find efficiencies and business growth opportunities and continue to explore ways automation can free up staff for more member-centric deliverables

5. Drive up engagement in programs that drive up business success one member at a time

Launch on-going marketing and communications plan/program to drive home focus on driving business success one member, one customer segment at a time – to get more people to participate, creating a culture of inspired volunteers and fulfilling committees, and appreciate what they are participating in.

Action Plans for Strategic Goals

1. Fully leverage incremental revenue opportunities to fuel member initiatives

Dial up Marketing Capabilities

There are several revenue growth opportunities available to NSBAR today. To take full advantage of these new revenue sources, MRED is going to need to enhance its capabilities for creating on-going marketing campaigns, events, education sessions both inside and outside of the state. WAV Group suggests contracting with a third party to outline the strategies and tactics and build momentum and a consistent cadence and test several approaches. Once the programs are fine-tuned NSBAR can hire an internal team to continue to deliver the programs over time.

MRED-enabled Opportunities

1. **Out of State Brokerage Expansion**
   Capitalize immediately on Compass's commitment to purchase MRED subscriptions for 100,000 agents. NSBAR should aggressively leverage its Chicago relationships to recruit Compass offices and agents in key referral markets, including Florida, Texas, Arizona, California, and the Midwest, turning one agreement into a national growth engine. Conduct outreach with other brokerages in referral markets and convince them to join MRED as well with on-going marketing campaigns, webinars, industry events etc. If NSBAR can capture just 1% of the 100,000, the company's MLS subscription based can increase by more than 20%

   LeadingRE Brokerage Partnership
   Consider sponsorship/partnership in Leading Real Estate Companies of the World headquartered in Chicago to invite their network of 550 brokerages to join MRED/NSBAR as well.

   2. Open MLS Opportunity
   Today, there is an estimated 15,000 licensed real estate practitioners in the state of Illinois that are not REALTORS®. NSBAR can launch a statewide campaign aimed directly at every one of these real estate practitioners. With a compelling and on-going campaign of email blasts, webinars, local events around the state, NSBAR can sell the competitive advantage of accessing Midwest and select national listings while gaining the ability to expose their own inventory through an expanding, nationwide MLS marketplace now

without the requirement to become a REALTOR®. If NSBAR can capture just 3% of those 15,000 licensee only practitioners, the company can realize more than a 10% increase in membership.

3. A La Carte Services
MRED is offering ways for every Shareholder Association to offer its own unique suite of MRED technologies. NSBAR can leverage a la carte services as a strategic wedge to deepen relationships with large brokerages and bring more of their agents into MRED through NSBAR. Target the brokers with the greatest appetite for flexible services, prove the value quickly, and convert that interest into broader subscription growth. NSBAR can be the Association that "cracks the code" on the way to offer A La Carte services effectively.

WAV Group suggests meeting with each of the ten largest brokerages in the Chicagoland area and poll their interest in a variety of MRED technology packages. Be the Association that delivers the variety they need and then provide an incentive for brokers to encourage all of their agents to move their REALTORS® membership to NSBAR. WAV Group also suggests meeting with appraisers, property managers and even home inspectors and build MLS system packages that will attract them to buy MRED subscriptions. Third, WAV Group suggests fielding a survey to all of your brokers and measuring interest in bundled packages. NSBAR may also want to consider providing a FREE subscription for brokers that bring at least 10 new agents to NSBAR.

Once the packages are outlined, conduct a road show to each of the offices of the brokers interested in partnering with you and sell why NSBAR is the best Association to meet their needs, one member at a time. Lean in on the organization's unique positioning.

4. International Expansion
Pursue international growth with urgency by building stronger relationships in Mexico, Europe, and other high-value global markets. NSBAR can position itself as MRED's international gateway, expanding exposure for participating listings while creating new revenue, referral, and partnership opportunities. It can leverage the national MLS positioning MRED has carved out.

Other Realtor® Associations

Pursue methods for generating incremental revenues by finalizing merger(s) with local Association, share services with other Associations and roll-out an Association management model for real estate associations like the NICAR model.

Mergers

NSBAR can work to close mergers under way. The company can also promote its member satisfaction and value and more overtly pursue additional ways to create a larger Midwest regional Association.

Sharing of Services

NSBAR has a well-oiled machine of Association services. NSBAR can "productize" each of the services it offers with tiered levels to address services for different sized Associations. Services can include tech support, education, professional standards, and advocacy.

Association Management Company (AMC)

NSBAR has already perfected the ability to provide Association Management Services via the NICAR model. NSBAR can expand those services and mirror other Association Management Services like the one offered by the Atlanta Association of REALTORS®.

National Association of Realtors® (NAR) and Illinois Realtors® (IR)

Based on the decision for Illinois REALTORS® to offer MRED services and the perceived potential conflict of interest, NSBAR wants to continue an analysis of benefit of the benefit remaining in Three-Way Agreement.

Operational Elements to Support Growth

To position NSBAR for the growth it wants to pursue, the company is launching the following new initiatives:

nsbar.org

NSBAR has re-launched its website with a fresh look and new functionality that will enable communications to brokers in and out of the state and to potential Association partners.

Association Management System (AMS)

NSBAR is also in the process of launching its new Association Management System, Relevate One. This tool will make it much easier to communicate regularly to current members and drive-up adoption of education, advocacy and events. It will also enable the ability to deliver on-going campaigns to potential new customers.

Logo and branding

NSBAR is in the process of launching a new brand, that will drive home its key mission, serving the needs of members, one member at a time.

Brokerage Management Company (BMC)

While NSBAR is prioritizing short term opportunities for growth for new membership, the work done to productize Association Management services can also be applied to Brokerage Management services. This program will be worked on once the shorter-term opportunities are fully optimized.

AI

24/7 Customer Support

NSBAR is one of the first Associations in the country to offer ARDI, a 24/7 customer support tool to help address member questions and needs in real-time. The program is ideal for helping to relieve the 24/7 burden of broker-owners and managers to answer questions for their agents after hours and even during the day. NSBAR has an opportunity, with its enhanced marketing services to much more aggressively promote adoption and continual expansion of the information available via ARDI.

Workflow Automation

NSBAR also has an opportunity to make their staff more efficient, effective and inspired by relieving the burden of cumbersome, time-consuming tasks with the power of AI automation. Once Relevate One is up and running, the team will be turning more of their attention to this important effort.

2. Help increase broker productivity and longevity

Launch initiatives and education that help brokers stay in the business longer and become more productive while helping to increase brokerage profitability.

Action Items

New Agent Success Boot Camp – Getting to your First Transaction

Already under way, the leadership is focused on finding ways to help new licensees cross the chasm into being a productive real estate practitioner, teaching them the basics on how to nurture buyers and effectively support them to buy real estate AND to support REALTORS® with ways to secure, promote and sell listings. This program may include, but not be limited to the following:

- **Sales Process Training – Prospecting through Customer for Life**
- **Cash Flow and Financial Management**
- **Leveraging MLS tools**
- **Best practices for attracting, nurturing and working with clients**
- **Best practices for buying and selling real estate**
- **Training on disclosures, forms needed to close a transaction**
- **How does real estate financing work and what is your role**
- **How do appraisals work and what is your role**
- **How to inspections work and what is your role**
- **How to work effectively with your fellow REALTORS®**
- **Business etiquette**

- **Responsiveness and Communications Training – text messages are not always the best answer**
- **How to prepare a CMA**
- **How to prepare a listing presentation**
- **How to secure referrals**
- **How to nurture repeat business**

And more….

Investigate Online Learning Management System

Education is going to be a large part of what NSBAR delivers to drive home tangible ways to help its members be more successful. Today, there are online learning management systems that can be branded to NSBAR and make it easier to promote and participate in online education. Programs like Rialto, for example, can combine proprietary training with robust libraries of training already built, all branded to NSBAR. This initiative will happen likely in mid-2027 once the short-term growth opportunities have been capitalized on.

AI Training

In the 2025 WAV Group Customer Experience Index survey, fielded nationwide, 74% of agent and broker respondents are interested in AI training. This is a hot topic and a great way to attract additional members to engage in NSBAR training. Programs like the 7-Day AI Challenge from the REAL AI Guy and others can be geared to agent needs and brokerage automation can be taught separately by AI consultants working with brokerages.

Sales Success Speakers/Coaches series

Create an annual calendar of Sales Success Coaches and Speakers to speak to agents about proven sales success strategies and separately to brokers about how to help their agents improve productivity.

Training and Events for Advanced Agents

While the Boot Camp can be helpful for many NSBAR members more well-established believe association training is too basic and they do need it. If the most productive agents do not believe NSBAR training is relevant, they may disengage completely from the association, and the perceived relevance of the organization is minimized as well. NSBAR can work with brokers and top producers to better understand their unique training needs and create a targeted effort to re-engage them via education and meaningful events. AI can help make it easier to launch more training courses.

Training for Team Leaders

Team leaders often feel left out from targeted training and communications from Associations. Because they are not a legally recognized entity they sometimes get lost in the shuffle. NSBAR can recognize this important demographic and build training for small business owners, clarify their legal responsibilities and help support sales success in their teams. NSBAR may also want to think about offering courses for admins, marketing leads and transaction coordinators to support team efforts.

Success via Technology with RETechnology.com

Now that RETechnology has been launched to the entire membership, there can be on-going promotions to help members engage with the daily technology educational content that can help learn how to leverage tech for more sales success.

Define Member Segments and Targeted Communications Efforts

Divide the NSBAR database into targeted segments to allow for more granular marketing and promotional efforts for groups like agents, brokers, team leaders, less than 1-year agents, 20+ transactions per year, 50+ transactions per year, independents, franchises/national brands, appraisers, committee-engaged, education-engaged, education not engaged, YPN etc. Then build a customized communications, events and education for each of the key target audiences.

This work can be led by the marketing resource NSBAR contracts.

3. Help managing brokers improve brokerage profitability

Support managing brokers to better support their operations to improve profitability and better service broker success and stay in business

Action Items

AI Workflow improvements Training

Managing Brokers, like everyone, are struggling to find ways to leverage AI to reduce costs, improve agent productivity and retention and to figure out the best ways to vet AI providers. NSBAR can play a role by working with trusted firms proven to build reliable solutions for brokers after training brokers on how AI can help them in their business. WAV Group's Fluente AI Division can support this effort as desired.

Financial Management and Benchmarking Training for Managing Brokers

Many managing brokers, especially independents do not have a lot of expertise managing financials. They do not have a way to benchmark performance against other brokerages anonymously. NSBAR can play that role to collect financials, normalize them and then bring in strong financial management and brokerage operations trainers to learn what to look for and how to maximize the value of their businesses.

Strategic and Business Planning Skills for Managing Brokers

Many managing brokerages grew up as salespeople, not strategists of visionaries. There are lots of tools to help agents with business planning but very few to help brokerages identify ways to maximize the value of their organizations. NSBAR can contract with brokerage business planning consultants/trainers to deliver a valuable service.

Evaluate Potential for Transaction Management/Deal Doctoring Support/Training

There was discussion at the session about whether NSBAR can play a role in teaching newer managing brokers about the right ways to provide compliance over their transactions. The group also talked about whether "deal doctoring" could or should be a service offered by the company. The staff, along with the company attorney can look at the upsides and risks of providing a transaction management/compliance service.

Compliance questions can be added into ARDI as well to support Managing Brokers with their own questions.

MRED-specific training for Managing Brokers

Work with MRED to build a training class to help managing brokers learn how Managing Brokers can reduce costs, differentiate their brokerage with consumers and help their agents to be more productive using MRED technologies.

Bi-Monthly "Profitable Brokerage" Forums

Launch a series of brokerage forums helping them identify ways to manage their businesses more profitably with topics like:

- AI automation for brokerages
- Economic updates
- How to leverage market stats to enhance your brand
- How to take advantage of federal tax policies
- How to drive up the value of their company
- Effective staff recruiting
- Promotion of Boot Camp program and success stories
- How to brand MRED technologies to your brokerage and REALTORS to make them part of your tech stack
- How to use MRED tech to save money and drive-up productivity
- Succession planning
- Power of Broker Public Portal and free leads it generates for you and your brokers

4. Free up resources for higher level support for staff, managing brokers and brokerage staff by delivering 24/7 AI support

Deliver 24/7 support by fully leveraging AI, tech and tools to drive home 24/7, 365 support available – find efficiencies and business growth opportunities and continue to explore ways automation can free up staff for more member-centric deliverables

Action Items

Aggressively promote Ardi Customer Support Platform to Managing Brokers, Brokerage Staff and then Brokers

When speaking with managing brokers there was a LOT of enthusiasm for the 24/7 support NSBAR can provide to reduce the burden of managing brokers to be on call 24/7 for their agents. Conduct a comprehensive campaign including live and online events, on-going campaign to managing brokers and staff and solicit their input on what types of questions they get that could be answered by Ardi. It may also make sense to create a workgroup where you solicit input regularly to continue to improve the depth of questions that can be answered. This work will be focused on once the shorter-term revenue growth opportunities have been fully explored.

Once Brokerage awareness and support is established, then build a comprehensive campaign to help every member understand all the ways NSBAR and ARDI can help them.

Investigate Opportunity to Work with ARDI to add Brokerage-Specific answers to ARDI

Investigate potential to offer ARDI to brokerages for use in their business adding the NSBAR functionality AND their own documents and procedures.

Expand ARDI for internal processes to free up time for NSBAR staff

Load up key documents and standard operating procedures to internal company processes.

Expand brokerage outreach with time freed up from automating Customer Support

Once ARDI is fully up and running, deploy a portion of NSBAR resources to projects like Brokerage outreach and education.

5. Drive up engagement in programs that drive up business success one member at a time

Launch on-going marketing and communications plan/program to drive home focus on driving business success one member, one customer segment at a time – to get more people to participate, creating a culture of inspired volunteers and fulfilling committees, and appreciate what they are participating in.

Action Items

Identify customer segments

Define the most relevant and unique member segments to be able to target communications, events, and education specifically to their needs. Identify customer segments like brokers in independent vs. franchise brokerages, aspiring top producers, top producers, aspiring to be in real estate full-time, new managing brokers, etc.

Poll Managing Brokers for Education Topics

Work with managing brokers to identify education topics that will help their brokers be more effective and profitable. Field 3 to 4 Focus Groups to gather ideas from small, mid-sized, large and independent brokerages. Leverage AI to build a series of short training sessions to address key issues identified by managing brokers.

Design educational programming for every customer segment

Outline custom education tracks based on the unique needs of each customer segment beyond the new agent segment covered in the Boot Camp. e.g. Investor focus, Power of CRM training for mid-tier, Expectations of first-time home buyers' education, Effective Communications beyond text, Market Educator using stats. Etc.

Targeted marketing plans to improve engagement for every customer segment

Launch segmented marketing plans for every defined customer segment to increase appreciation of NSBAR by promoting targeted education, events and advocacy wins.

6. Continue to expand Association Management Company

Continue to deepen relationships with neighboring associations, generate incremental revenues, and provide capital to expand member-centric services.

Action Items

Package Association Management services/packages

Modelling after Asset Management and Association Services, NSBAR can create packages of services available for sale to fellow real estate associations in Illinois and beyond.

Collect Feedback/Testimonials from current Association Management Clients

- Build KPI's to measure satisfaction of current Association Management contracts.
- Secure feedback from current Association Management clients to be able to leverage in promotional campaigns and to ensure continual improvement of services.

Launch industry-wide campaign to promote availability of Association Management Services

Once the Association Management offerings are defined, NSBAR can launch a statewide/nationwide campaign and sales effort enabling small associations to provide effective programs without having to invest in staff and infrastructure beyond their reach.

Scale up AI support to be able to expand Association Management services without significant increases in staff

Leverage ARDI and other AI solutions to enable Association management growth. Automate delivery of services and expand number of Association Management customers without having to add significant numbers of staff

Next Steps

Plan Approval

Review strategic goals and action items with Exec Committee and Board of Directors to secure approval of the focus, timing and key performance indicators to be monitored

Build Action Plans and Finalize Key Performance Indicators

Break down action plans and key performance indicators into projects and then assign staff leadership responsibilities. Identify and hire/contract resources needed to achieve plan.

What Needs to be Discontinued

When presenting the action items to be focused on, staff will also recommend programs/processes to be discontinued to free up time for higher priority efforts.

Training Needs

The CEO will also outline additional staff training needs to build the skills to achieve the Profitable Future Planning sessions.

Board Meeting Progress Updates

Build a visual plan that is presented and discussed at every board meeting to ensure project executions stay on track and the Board of Directors is monitoring progress and providing oversight and maintaining focus on strategic priorities.