CASE STUDY · AGENCY OPERATIONS

Operating ~100 real estate accounts with one delivery *system*.

A California marketing agency serving U.S. real estate brokerages needed delivery that ran on process, not on people.

CLIENT	INDUSTRY	ROLE	PERIOD
R Creative Agency	**Marketing agency · U.S. real estate**	**Director of Operations**	**2023 – 2026**

~100
U.S. client accounts operated

680
posts through one approval system in 31 months

2 of 2
at-risk accounts retained

The challenge

The agency managed brokerages across the U.S., including 24 offices of a national franchise (14 at the same time) and 10 service lines.

Approvals and publishing lived in different places, every office had its own way of working, and two key accounts were at risk of leaving.

What we did

One approval flow
Built in Trello: every post moved from ready to approved or changes requested, with nothing lost in chats.

One publishing system
Content deck to Google Sheets to CSV to scheduler, with documented rules for each client.

Team leadership
Led a direct team of 9 across 5 departments and coordinated 120+ people, including account managers, supervisors and contractors.

Cost visibility
Mapped team and contractor costs and presented 4 restructuring options with benefits, risks and open questions.

Account recovery
Found the real cause (understaffing), redistributed accounts, added staff and ran a 2-month recovery plan with weekly check-ins.

Results

- **~100 accounts running on one standardized delivery system**
- **680 posts approved for a national franchise in 31 months, about 22 a month**
- **Both at-risk clients stayed**

In their words

“Yelisa was a key part of our team. She is highly organized, proactive, and very strong when it comes to communication with clients.”

Isaac Hodgson · Founder, R Creative Agency

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