



MANAGE & CLOSE

Business case worksheet

This worksheet will help you quantify the value of investing in Buildout's Manage & Close product. By documenting the time and cost savings from automating key tasks, you can build a compelling case for your firm's leadership.

Section 1: Identify Key Pain Points & Time Spent

Before you can show the value of a solution, you need to highlight the problems. This section helps you identify which manual processes are most time-consuming for your team.

For each task below, estimate the average time spent per deal or per week/month.

Task	Estimated Time per Deal (Hours)	Estimated Time per Week/Month (Hours)	Notes (e.g., Staff involved, specific challenges)
Manual data entry (deal sheets, contact info, etc.)			
Generating commission/fee reports			
Reconciling deal financials (splits, payments, etc.)			
Creating and managing deal playbooks and checklists			
Answering broker questions about deal status			
Compiling financial reports for leadership			
Auditing deal data for accuracy			
Other time-consuming tasks:			



Section 2: Quantify the Savings

Now, let's translate the time spent into a financial value.

A. Time Savings Calculation:

- Total estimated time saved per month (from Section 1): _____ hours/month
- Average hourly salary of operations staff: \$_____/hour
- Total monthly cost of time spent: (Hours/month) x (Hourly salary) = \$_____/month
- Total annual cost of time spent: (Monthly cost) x 12 = \$_____/year

B. Time Savings Calculation:

Consider the costs of manual errors and data discrepancies.

- **Estimated cost of a single commission error:** \$_____
- **Number of commission errors per year:** _____
- **Total annual cost of commission errors:** (Cost per error) x (Number of errors) = \$_____/year
- **Potential cost of a missed deadline or compliance issue:** \$_____
- **How often do you deal with this? (e.g., annually, semi-annually):** _____
- **Total annual cost of missed deadlines/compliance issues:** \$_____

Section 3: Quantify the Savings

This is where you project the future benefits of investing in the product.

- **Improved Efficiency:** How much more time could your team spend on high-value tasks like analysis, strategic planning, or broker support?
- **Enhanced Data Accuracy:** How would having a single source of truth for all deal data benefit the firm's forecasting and decision-making?
- **Better Broker Experience:** How would automating administrative tasks improve the experience for your brokers, allowing them to focus on revenue-generating activities?
- **Potential for Growth:** How could this new efficiency enable the firm to handle a higher volume of deals without increasing headcount?

Section 4: Quantify the Savings

Use the numbers you've calculated to create a concise summary for leadership.

Current Annual Costs of Manual Processes:

- **Time-related costs:** \$_____
- **Error-related costs:** \$_____
- **Total Estimated Annual Cost:** \$_____

Proposed Solution:

Investing in Buildout Manage & Close would automate these processes, directly addressing our current inefficiencies.

Projected ROI:

By eliminating \$_____ in annual costs related to manual work and errors, we can expect a return on investment within [Number] years. This investment will not only pay for itself but will also empower our staff and brokers, positioning our firm for future growth.

