buildout

THE STATE OF CRE

What top brokerages are doing **differently**

A look at the shift from disconnected point solutions toward one connected system for prospecting, marketing, and back-office operations.

The case for **one connected system**

Most brokerages don't end up with a fragmented tech stack on purpose. It happens gradually — a prospecting tool gets adopted here, a marketing platform gets added there, a separate system handles commissions, and a CRM sits in the middle trying to keep it all in sync. Individually, each piece might work fine. Together, they create a brokerage where the same information has to be maintained in five places at once.

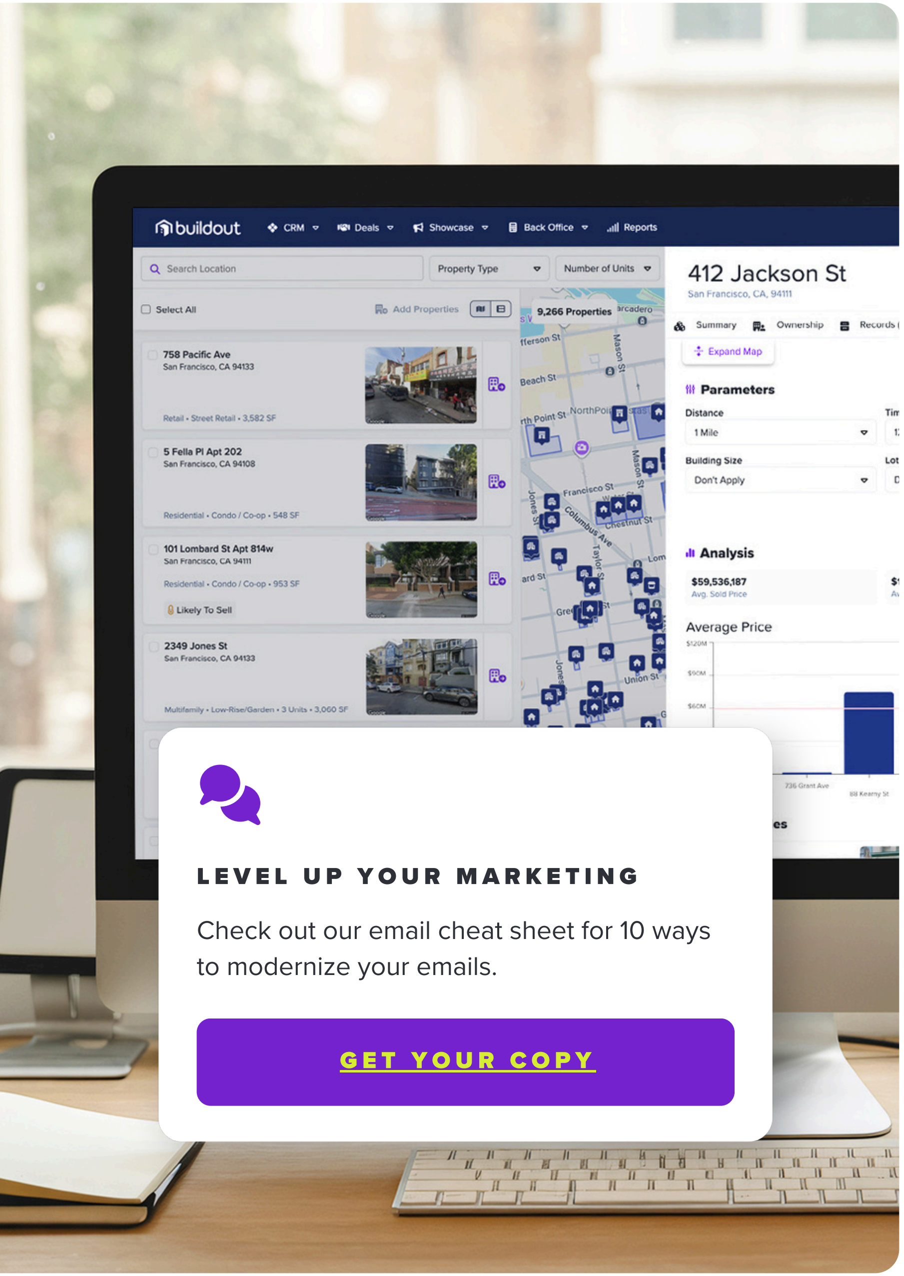
The alternative is simple to describe and harder to build: enter data once, and let it power everything downstream: prospecting, contact management, marketing, and back-office operations.

What **"consolidated"** actually means

- **NO DUPLICATE DATA ENTRY**
  A listing entered once is immediately available to prospecting, marketing, and proposal tools — not re-typed into each.
- **DATA ACCURACY**
  A contact updated in one place stays accurate everywhere, instead of drifting out of sync across separate systems.
- **FULL PIPELINE VISIBILITY**
  A deal's progress connects from the first prospecting touch through marketing, negotiation, and commission payout at close.
- **FULL DEAL REPORTING**
  Reporting reflects the full deal cycle, not a patchwork stitched together from disconnected tools.

It's tempting to solve this one department at a time. Simple order of operations would say first you fix marketing, then separately fix prospecting, then finally the back office. But treated as isolated problems, that approach just relocates the friction. The bigger opportunity, and the harder one, is treating brokerage technology as one connected system.

Discover the power of a **truly connected operating system**



LEVEL UP YOUR MARKETING

Check out our email cheat sheet for 10 ways to modernize your emails.

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WHY IT MATTERS

What a connected platform **should actually do**

Marketing is usually where the disconnect is felt first, since it's where listing data, design, and outreach all have to come together quickly and often. It's a useful lens for what "connected" should mean in practice; the same standard is worth applying to prospecting and back-office tools too.

Data shouldn't need to be re-entered

Whether it's an email, a proposal, or a prospecting list, the property and contact data behind it should already exist in the system — not require rebuilding from a spreadsheet or a separate design tool. Purpose-built CRE tools also tend to outperform general-purpose ones here: platforms built for every industry aren't optimized for what a property marketing email or proposal actually needs to include.

In practice, that looks like a campaign that opens with the address, price, square footage, and highlights already in place, a listing link that can be dropped in with one click, and lead activity on that link tracked automatically; so a team knows who engaged before they even follow up. It also means the send itself shouldn't force a tradeoff: a connected platform can send natively or push a built campaign out through a tool a team already relies on, like Mailchimp or Constant Contact. When 79% of brokers rank email as the most effective marketing tactic, you don't have time to waste building clunky emails and then exporting them into different solutions.

2026 DNA OF CRE INSIGHT

79%

of brokers rank **email as the single most effective CRE marketing tactic**.

AI should reduce manual entry, with a human still verifying it

Roughly a quarter of brokers spend 8 to 15 hours a week on administrative tasks, much of it data entry. AI-assisted data capture — pulling property details out of an uploaded agreement or spreadsheet — can meaningfully cut that time, provided the tool leaves a clear review step rather than pushing unverified data live automatically.

A well-built version of this handles more than one document at a time and processes in the background, so a team member can upload files and keep working instead of waiting. The goal is a head start on the data entry, not a replacement for someone's judgment on the final review.

Templates should populate themselves

A proposal or listing template that has to be manually updated with property details every time it's reused isn't saving much time. Smart, automated fields, where a saved template pulls in the right property name, address, price, square footage, and broker contact info automatically, turn a template library into a real efficiency gain rather than just a design shortcut. Build the layout once, save it, and every future deal starts from an accurate, on-brand document instead of a blank page.

AI generation should still leave room for something custom

Template libraries cover the common cases well, but deals don't always fit a standard format. A more flexible approach lets a team describe what they need, such as an investment summary, a specific market overview, or a page unique to one deal, and generates it on the spot, without forcing a rebuild of the entire document. If one page needs a revision, only that page should have to change; the rest of the document stays as it was.

Roughly 4 in 10 brokers say they want AI to help create marketing collateral faster. The differentiator among tools that offer this is whether the output is built on a design system that looks professional by default and stays fully editable, versus a generic layout that reads as obviously AI-made.

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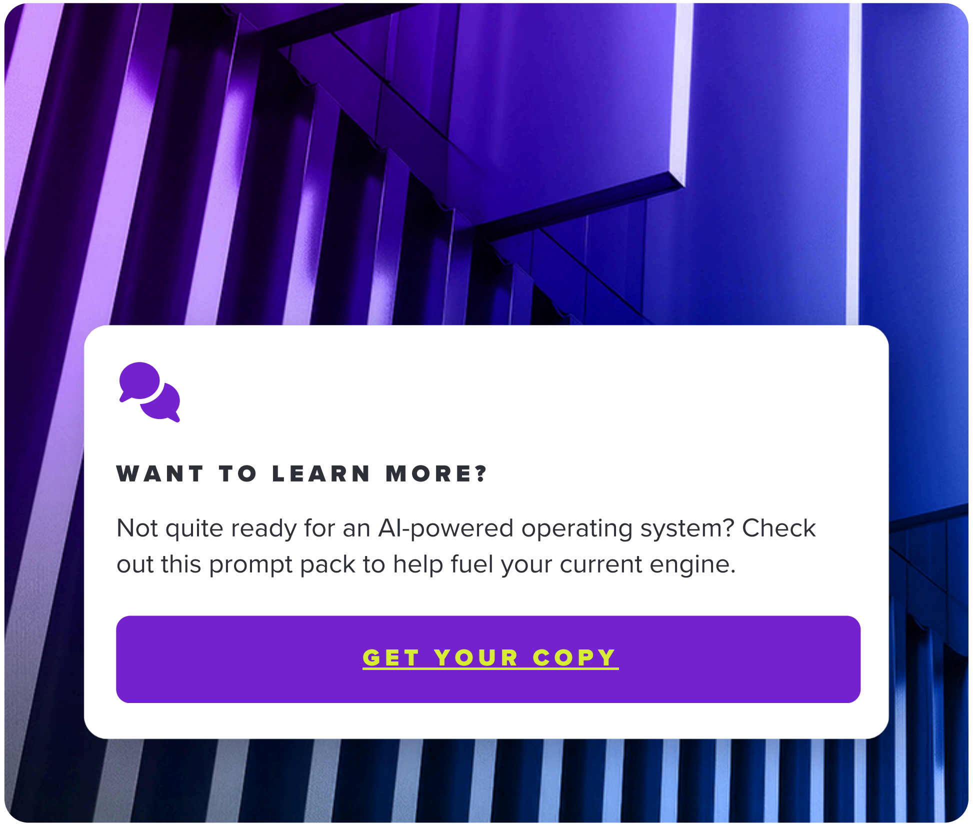
4% VS 53%

4% of brokers can turn around a proposal in minutes — versus the 53% who say it takes days.



WANT TO LEARN MORE?

Not quite ready for an AI-powered operating system? Check out this prompt pack to help fuel your current engine.

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A closer look at connected brokerage operations

Consolidating a brokerage's tech stack is a bigger decision than swapping one tool for another, and it's worth approaching with a clear picture of where your team's data currently lives and where it breaks down between systems.

Buildout has spent years building toward this idea of brokerage automation. One system where data entered once can power prospecting, marketing, and back-office operations alike. If it's useful context as your team thinks through its own stack, our resources on brokerage operations are a good next stop.

Check out our AI approach in our recent webinar

LET'S CHAT

Curious how this looks in practice? Learn more about Buildout's approach to **connected brokerage operations.**

BOOK A DEMO

THE IMPACT

What changes when you consolidate

The value of consolidation compounds across a brokerage rather than staying contained within the department that adopts it first. When prospecting, marketing, and back-office operations all pull from the same source of truth, the effects tend to show up in a few consistent ways:

- **REDUCED ADMIN WORK**
  Brokers spend more time on revenue-generating activity and less on administrative work.
- **CROSS-TEAM TIME SAVING**
  Marketing and operations teams can reclaim time while still keeping up with demand.
- **BACK OFFICE EFFICIENCY**
  Commission processing and reporting move faster because the underlying data is already accurate.
- **BRAND CONSISTENCY**
  Every client touchpoint feels consistent and on-brand, without anyone manually enforcing it.