



SCALE SMARTER

Stop hiring to scale.  
**Automate** instead.

How CRE brokerages are doing more with  
the team they already have





## INTRODUCTION

# The firms pulling ahead aren't bigger, they're smarter

Most brokerages scale by hiring. More brokers, more coordinators, more marketers. It's the obvious move when business is growing. But hiring only goes so far. The same problems show up again, just at a bigger scale.

There's a different way to grow. Instead of adding capacity, you build it in. You shift the repetitive work off your people and onto a system that runs the same way every time, across every deal, for every broker on the team.

This guide makes the case for becoming an automation-first firm and shows what that operating model actually looks like in practice.



### INDUSTRY INSIGHT

**41% of brokers say missed follow-ups** are their biggest deal management challenge. Yet **53% still don't use a dedicated deal management system**. That's not a coincidence. You can't stay on top of every deal without the right system holding it together.\*

\*All stats in this guide come from The DNA of #CRE 2026 report.





Picture two firms winning the same listing on Monday morning. **Here's where they end up on Friday:**

<b>MONDAY</b> Start of week	<b>TUESDAY</b> Getting a listing live	<b>WEDNESDAY</b> Pipeline visibility	<b>THURSDAY</b> Marketing materials	<b>FRIDAY</b> End of week
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**FIRM A | MANUAL FIRM**

You check your email, a spreadsheet, and your basic CRM to piece together what needs attention this week.	You manually pull together property details, email them to marketing, and wait.	You spend hours reading email threads and opening spreadsheets to pull together a status update.	You brief the marketing team verbally or by email and wait days for a first draft.	You spend Friday assembling reports and chasing updates instead of preparing for next week.
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**FIRM B | DISCONNECTED TOOLS**

You log into 6 different tools just to get a picture of your weekly priorities.	Your listing goes live 3 days later because every step requires someone to re-enter the data.	You pull data out of your CRM, reformat it, and paste it somewhere else just to share a status update.	Multiple back-and-forths with marketing just to get a brochure out the door.	You wrap the week pulling reports together by hand instead of looking ahead.
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**FIRM C | FULLY AUTOMATED SUITE**

You log into one system and see everything that needs your attention — deals, tasks, follow-ups — in one place.	You move the prospect you won into a listing. The OM and property website generate automatically in minutes.	Your pipeline report is live and current. You share it with leadership without touching a spreadsheet.	The property data already lives in the system. Collateral is created and marketing has time left over for higher value work.	You close the week reviewing live dashboards, knowing exactly where every deal stands and what comes next.
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## WHAT DOES THIS MEAN?

An automated brokerage is the key to **reclaiming** your time

On any single deal, the automated firm saves hours, even days. Multiply that across every broker and every deal and the gap stops being about time. It becomes the difference between a firm that can take on more volume, and a firm that can't.

Here's the number that puts it in perspective: **brokers spend only 19% of their time nurturing client relationships**, the work that actually wins repeat business. The other 81% is going somewhere. It's going to status updates, reformatting data, chasing down files, and pulling together reports that a system should be handling.

That 81% isn't a time management problem. It's a systems problem.

And with most deals taking anywhere from 4 to 12 months to close, that's a long stretch to stay organized without the right tools supporting you. The firms winning the next listing and the repeat business aren't working harder. They're the ones who got that time back.





**GUIDED EXERCISE**

# Where does your firm **actually stand?**

Answer honestly. The goal isn't a perfect score — it's to see clearly where time is being spent on things that shouldn't need a person.

	Yes	Sometimes	No
My team switches apps to finish one task	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brokers spend time on entry, formatting, or chasing updates	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Errors show up in documents, listings, or flyers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We pay for 4 or more separate tech tools each month	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our tools rely on workarounds to share data	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brokers are in the field or with clients less than half of their week	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Mostly yes or sometimes?**

You're not dealing with a people problem. You're dealing with a systems problem. Your team is spending time on work a system should own, and your tools aren't built to work together.

**THE OUTCOME**

## What this is actually costing you

The cost of not automating and working in one system isn't always obvious on any given day. It shows up in small friction: a file that needs to be resent, a status update that takes 20 minutes to pull together, a listing that goes live two days late. Those aren't big problems in isolation; but rather a small piece of a larger problem.

▶ **FOR THE PRINCIPAL**

Every tool you add to patch a gap comes with a price tag: software fees, onboarding time, and a person whose job is just keeping everything connected. But the bigger cost is what you're paying your team to do. Roles that could be handled by software. Talented people spending their day on work that doesn't need them.

▶ **FOR THE BROKER**

Add up the hours you spend each week on entry, formatting, follow-up reminders, and status updates. For most brokers it's 8–12 hours. That's time that isn't in front of a client.

▶ **FOR THE FIRM COMPETING FOR TALENT**

The best brokers have options. When they're evaluating where to land, they're looking at more than commission splits. A firm running on disconnected tools and manual processes is a harder sell than one where the system does the heavy lifting. Your tech stack is part of your pitch now.



## NOT ALL BROKERAGE WORK IS THE SAME

# What **automation-first** actually means

Automation gets a bad reputation in CRE because people picture it replacing the broker. It doesn't. Brokering is a relationship business, and that part isn't going anywhere.

AI adoption in CRE jumped from 38% in 2024 to 83% in 2026. The industry has already decided. The real question isn't whether to use it. It's whether you're using it strategically across your business, or just bolting it onto a broken one.

Automation-first means one specific thing: every repetitive task has a system owner instead of a person owner. The broker still owns the conversation, the negotiation, the judgment. The system owns the entry, the routing, the syndication, the reminders.

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### RELATIONSHIP WORK | BROKER OWNED

Pitching, negotiating, walking the property, building trust. This is what wins business. It stays with the broker.

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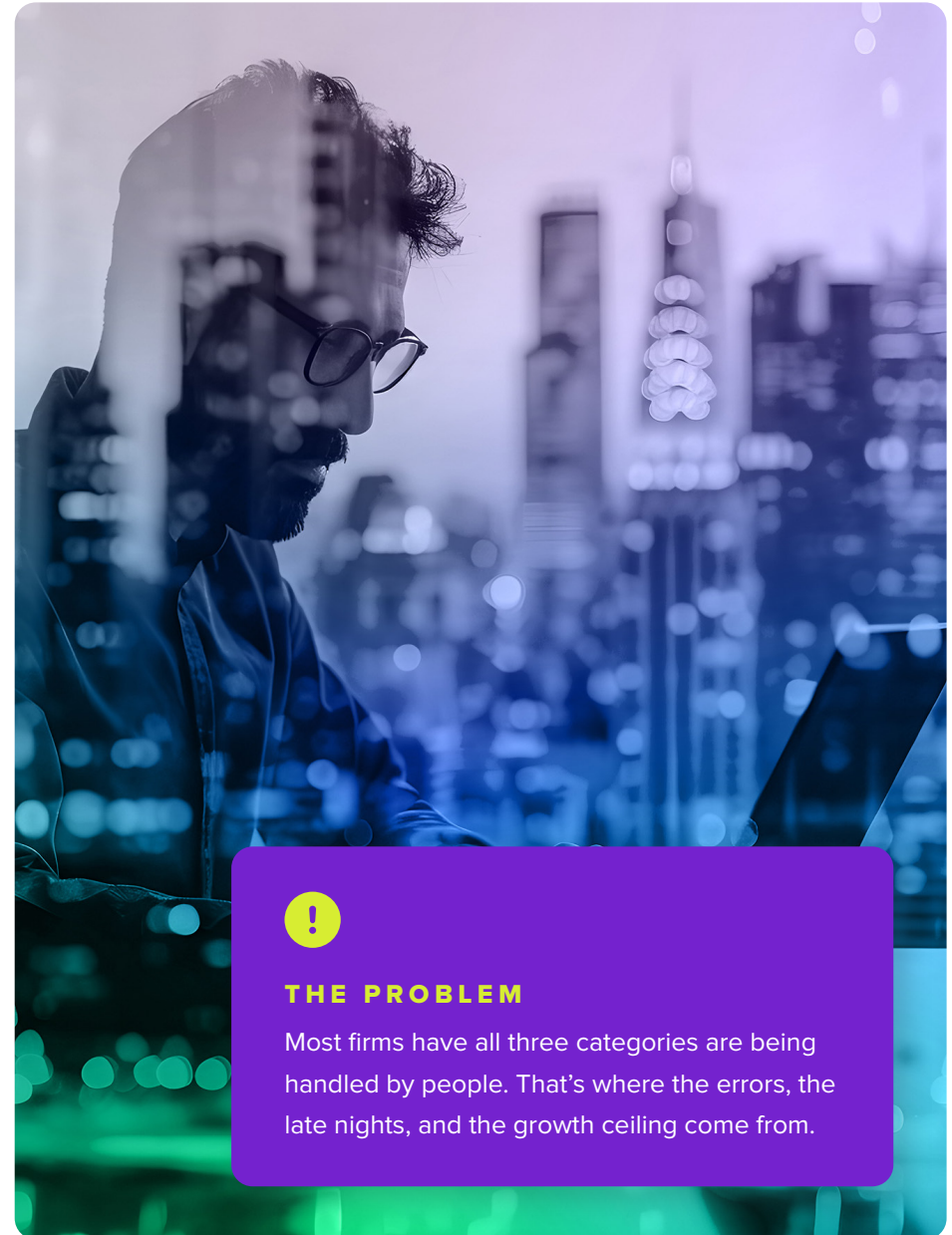
### DECISION WORK | HUMAN ASSISTED

Pricing strategy, positioning, deal structure. The system surfaces the data and a person makes the call.

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### OPERATIONAL WORK | AUTOMATED

**This is what Buildout owns.** Data entry, syndication, follow-up reminders, status updates, reporting, file routing, research collection, document generation, and transaction processes. The work that quietly eats your week.



### THE PROBLEM

Most firms have all three categories are being handled by people. That's where the errors, the late nights, and the growth ceiling come from.



## HOW A CONNECTED SUITE WORKS

# A stack of apps is **not** **a system**

It's a stack of handoffs and a stack of hours spent by people filling the gaps where the tech falls short or doesn't exist.

Most brokerages run on a pile of separate tools. A CRM here, a marketing tool there, transaction software somewhere else, a spreadsheet for forecasting, and countless email threads in between. And a roster of people whose day is spent keeping it all together. Each one does its job. The problem is what happens between them.

Every time information moves from one app to the next, someone on your team has to move it. They retype, copy, paste, export, reformat, and forward. Those are hours your brokers spend managing software instead of managing relationships. And when you need to edit a listing, there goes your entire day.

An AI brokerage automation solution works differently. It's one system underneath the whole workflow. Less like another app, more like an operating system for your firm. The data lives in one place and flows forward on its own.

Buildout Suite is exactly that: an AI brokerage automation solution for every step of the deal cycle. In other words, from contact to commission, everything is automated for you.

**Four workflow layers, one connected system.**

## HOW DATA FLOWS IN A CONNECTED SUITE





# A deal in a **connected** brokerage

Most of the time lost in a brokerage isn't lost on bad deals. It's lost on the work that surrounds a good one. Here is what it looks like when that work runs itself:



## THE PROSPECTING

You identify a likely seller directly in the system. Ownership details and contact information are right there on the property record. No switching to another tool to research, no manually logging the outreach. You add them to your pipeline and the follow-up runs on a schedule without you having to remember it. No retyping, no follow-up emails to get things moving.



## THE ROLLOUT

The listing goes live without a handoff chain. The property website is generated, the listing pushes out to your syndication network, and the deal appears in the pipeline — all from the same action. Marketing doesn't wait on the broker. The broker doesn't wait on marketing.



## THE ACTIVITY

Leads start coming in. Instead of checking three different platforms to see who's engaged, the activity flows back into the system automatically. The broker knows who clicked, who downloaded, who came back — without leaving the deal record.



## THE UPDATE

A client wants to know how the listing is performing. The broker pulls a live report in minutes. Website views, document downloads, lead activity, all current, all in one place. The broker looks prepared because the system kept the data ready.



## THE CLOSE

When the deal moves forward, the pipeline updates. Leadership sees it without asking. Reporting reflects it without anyone assembling it by hand. The next deal is already in motion before the paperwork is finished on this one.



## THE POINT

A connected brokerage doesn't close deals faster because its brokers work harder. It closes deals faster because nothing is waiting on a person when it shouldn't be.



## LET'S CHAT

# See the full Buildout Suite **in action**

**Book time with our team** and we'll walk through how a connected brokerage operates — using your real deal cycle as the example.

Whether you're a broker looking to get your week back or a principal ready to grow without adding overhead — we'll show you exactly what changes.

Buildout is a CRE AI brokerage automation solution built to help brokerages close more deals with less friction. From prospecting to commission, everything runs in one connected system.



**“I feel less overwhelmed** and things are streamlined. I'm always clear what's my next priority.”

**HANNAH GREENING** | FANCY REAL ESTATE

