



BROKERAGE OPERATIONS CHECKLIST

8 signs your brokerage is leaking margin

Stop Managing Tools. Start Closing Deals.

Commercial real estate teams don't realize how much "operational drag" is costing them until it's gone. When your CRM, marketing, and back office don't talk to each other, you aren't just losing time—you're losing margin.

01 THE "DATA ENTRY" TEST

- Zero Re-entry** | When a lead is captured in your CRM, does that data automatically flow into your flyers, brochures, and listing pages without a single "copy-paste"?
- Single Source of Truth** | If a property's square footage changes, does it update across your CRM, active listings, and internal deal tracking simultaneously?

02 THE WORKFLOW CONNECTIVITY AUDIT

- Cross-Team Visibility** | Can your Finance or Marketing teams see exactly where a deal stands in the pipeline without having to email a Broker for an update?
- One Login to Rule Them All** | Does your team manage prospecting, CRM, marketing, and commissions within a single system, or are they "duct-taping" 4+ different tools together?

03 THE AI "WORKFORCE" REALITY CHECK

- Execution Over Assistance** | Does your AI actually do the work (like drafting property descriptions or ingesting property data) rather than just offering a chat box for suggestions?
- Automated Follow-ups** | Are your prospecting tasks and follow-up reminders generated automatically based on your real-time deal activity?

04 THE "OPERATIONAL DRAG" PULSE CHECK

- Speed to Market** | Can your marketing team take a listing "live" in minutes instead of days because the property data was already in the system?
- Frictionless Closing** | When a deal closes, do the specifics automatically convert into a Comp record in your database for future prospecting?



THE FLOW

The Buildout Suite

The **Buildout Suite** is the only end-to-end "AI Deal Engine" designed to own the full lifecycle of a deal. From the moment you identify a prospect to the second the commission hits the bank, your data flows forward automatically. No more manual data re-entry, no more "duct-taping" apps together, and no more missed follow-ups.

