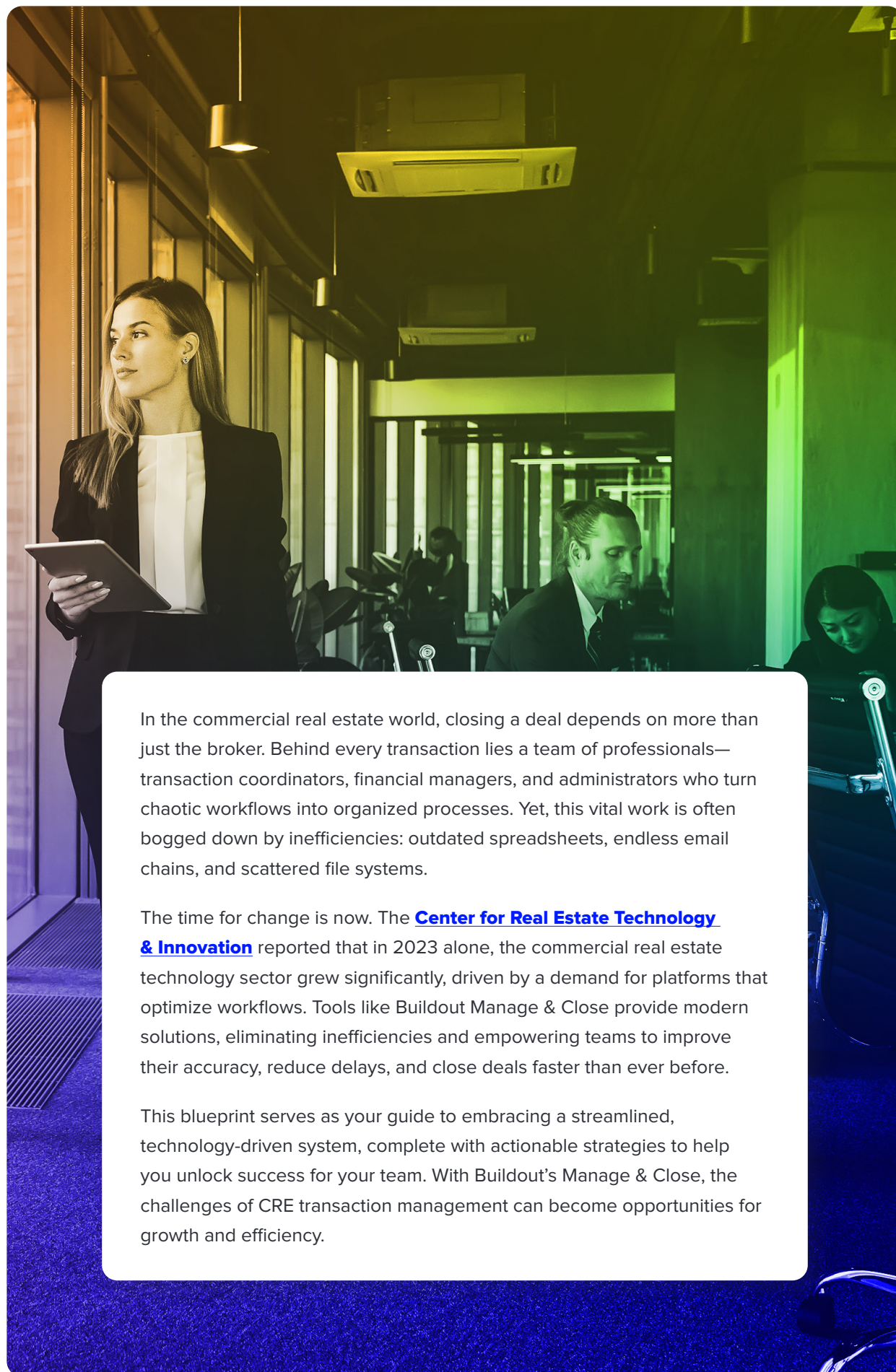




BEYOND THE SPREADSHEET

# The new standard for CRE transaction management





In the commercial real estate world, closing a deal depends on more than just the broker. Behind every transaction lies a team of professionals—transaction coordinators, financial managers, and administrators who turn chaotic workflows into organized processes. Yet, this vital work is often bogged down by inefficiencies: outdated spreadsheets, endless email chains, and scattered file systems.

The time for change is now. The [Center for Real Estate Technology & Innovation](#) reported that in 2023 alone, the commercial real estate technology sector grew significantly, driven by a demand for platforms that optimize workflows. Tools like Buildout Manage & Close provide modern solutions, eliminating inefficiencies and empowering teams to improve their accuracy, reduce delays, and close deals faster than ever before.

This blueprint serves as your guide to embracing a streamlined, technology-driven system, complete with actionable strategies to help you unlock success for your team. With Buildout's Manage & Close, the challenges of CRE transaction management can become opportunities for growth and efficiency.





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## CHAPTER 01

# The hidden risks of a disorganized process (and how to fix them)

Coordinating deals in commercial real estate often feels like juggling while blindfolded. Think about the number of spreadsheets you've had to update, the countless times you've dug through inboxes for one email attachment, or the sheer confusion of locating the latest version of a key document. The inefficiencies in this system are more than just frustrations. In fact, according to CFlow, companies can lose between **20%-30% of their annual revenue** due to inefficiencies.

## Where disorganized processes **go wrong**



### FRAGMENTED SPREADSHEETS

A static master list that's immediately outdated after you make the next update.



### EMAIL OVERLOAD

Crucial information is buried in endless threads, making even simple tasks time-consuming.



### UNRELIABLE DOCUMENT SHARING

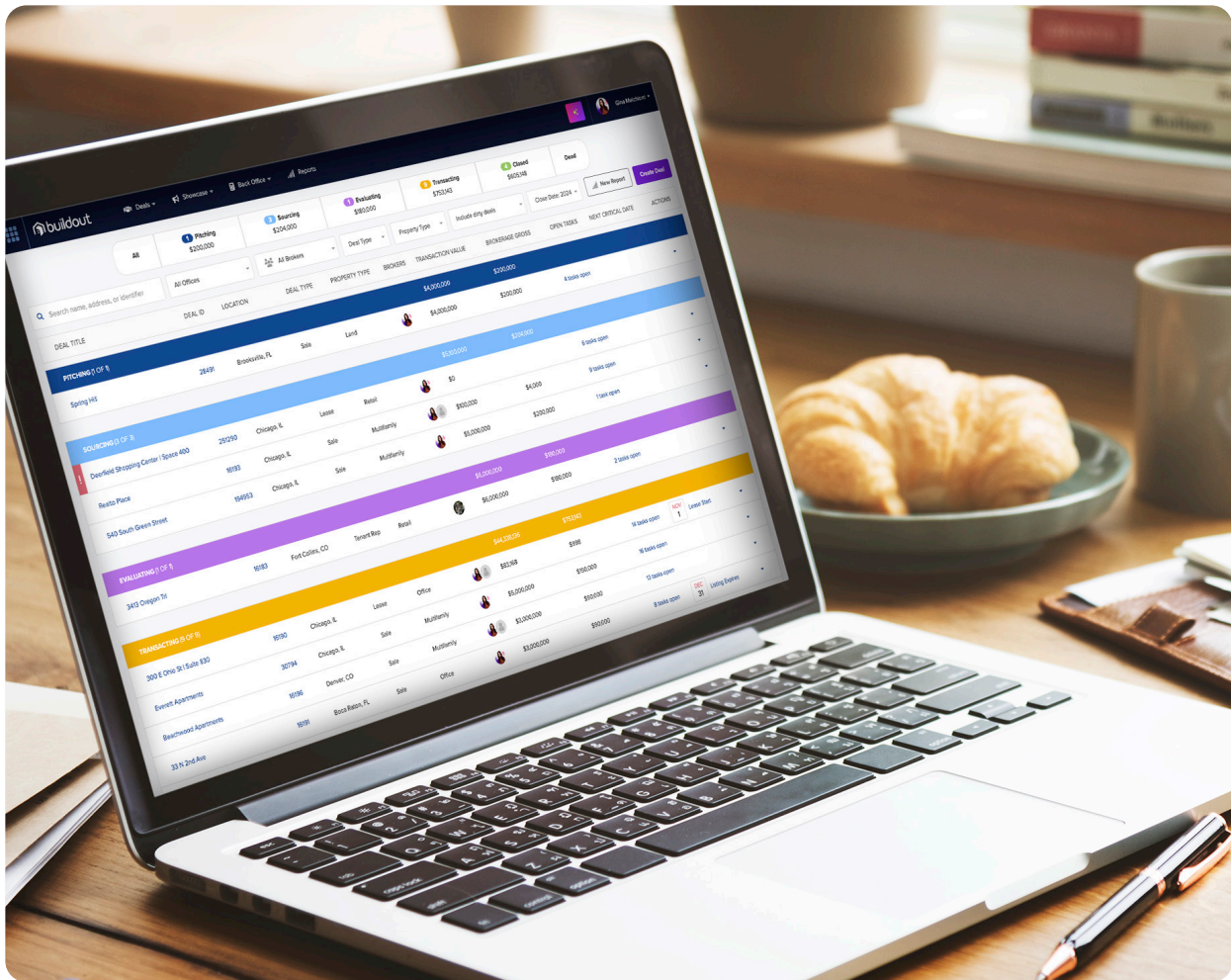
Shared drives with unclear organization make it difficult to be certain you've accessed the correct version of a file.



### MISSED DEADLINES

Tasks and milestones can be overlooked amidst manual systems and scattered communication.





## The solution: A unified system with **Buildout's Manage & Close**

The answer to eliminating these inefficiencies starts with centralization. Buildout Manage & Close creates a single source of truth for all your deal data, documents, and communication, bringing everything into one secure and easy-to-access platform.

How Manage and Close Helps Fix Common Issues:



### **CENTRALIZED DATA MANAGEMENT**

Eliminate fragmented spreadsheets and store all your deal details in one comprehensive, real-time platform.



### **STREAMLINED COLLABORATION**

Team members can access shared files, messages, and updates without digging through email inboxes.



### **DEADLINES YOU CAN RELY ON**

Automated task reminders and milestones ensure no critical date gets overlooked.

With the right technology, clarity and efficiency are built into every deal, giving your team the foundation they need to succeed.



## CHAPTER 02

# Get your workflow in order | From spreadsheet confusion to a visual pipeline

For many people in the CRE Industry, the deal lifecycle is mapped out in spreadsheets. Static rows and columns don't provide the dynamic insights you need to stay organized. Spreadsheets don't show where bottlenecks exist, which deals are at risk, or where you should prioritize your efforts. Without a dynamic system, delayed closings and workload overwhelm become inevitable. A [2023 Deloitte study](#) found that 74% of CRE professionals admit that manual processes slow their workflows.

## What's missing?



### REAL-TIME STATUS UPDATES

Spreadsheets don't reflect the current state of deals.



### PRIORITIZATION

It's hard to see what tasks need immediate action.



### ACCOUNTABILITY

Spreadsheet versions are often passed around with no clear owner overseeing progress.

## A visual pipeline for **every deal**

With Buildout Manage & Close, you can transform your static spreadsheets into a real-time visual pipeline that shows the status of every transaction at a glance.

Here's how we make it happen:



### DEFINE CUSTOM DEAL STAGES

From prospecting to closing, set up clear stages that reflect your brokerage's unique transaction process.



### KANBAN-STYLE VIEW

Use drag-and-drop functionality to move deals between stages easily, which eliminates confusion and highlights stalled deals in seconds.



### REAL-TIME INSIGHT UPDATES

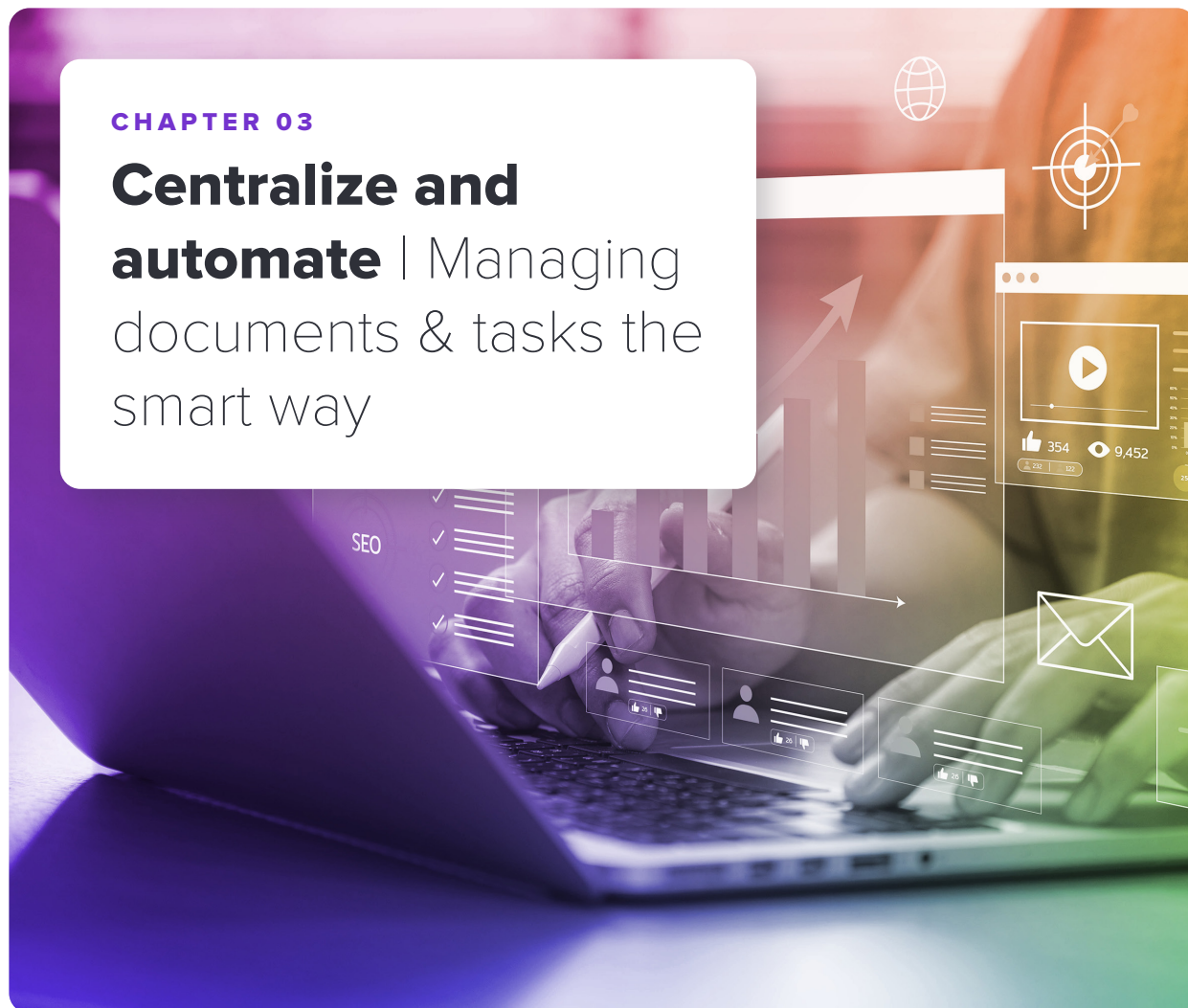
As tasks are completed, the system automatically updates deal progress, making tracking effortless.

With visibility, your team can focus on moving deals forward while identifying risks and opportunities quickly. A visual pipeline is no longer just an idea; it's the standard for building an efficient and proactive brokerage.



**CHAPTER 03**

# Centralize and automate | Managing documents & tasks the smart way



Every deal generates mountains of contracts, due diligence files, financial reports, and other critical documents. When stored across multiple platforms, email, shared drives, and desktops, disorganization creates delays, errors, and frustration. [Gartner reports poor data management](#) costing organizations an average of \$12.9 million annually.

## Common risks you face

**VERSION CONTROL ISSUES**

- Accidentally working with outdated or incorrect files can jeopardize a deal.

**MISSED DEADLINES**

- Critical timelines are easy to lose track of without a centralized system to house and prioritize tasks.

**COLLABORATION GAPS**

- Lack of structure often leads to miscommunication between team members or delays in approvals.





## The fix: **The automated deal file**

An automated deal file is a centralized, digital workspace where every transaction has its own secure location for managing documents and tasks. With Manage and Close, you can:



### **STORE AND SHARE FILES EASILY**

No more hunting for documents across multiple platforms.



### **TRACK TASKS WITH PRECISION**

Assign responsibilities, set deadlines, and enable automated reminders to stay on target.



### **ENSURE CONSISTENCY**

Everyone works off the same information, from transaction coordinators to the brokerage partners.

Not only does automation make your day-to-day work simpler, but it also ensures that the entire brokerage team is aligned, reducing the risk of errors and improving deal efficiency.

The push for automation has become increasingly important for many senior executives. In fact, the [MRI's digital transformation journey study](#) cited that more than 76% of C-Suite and director-level industry professionals identified automation as an urgent priority.



**CHAPTER 04**

## Using deal data for **long-term success**



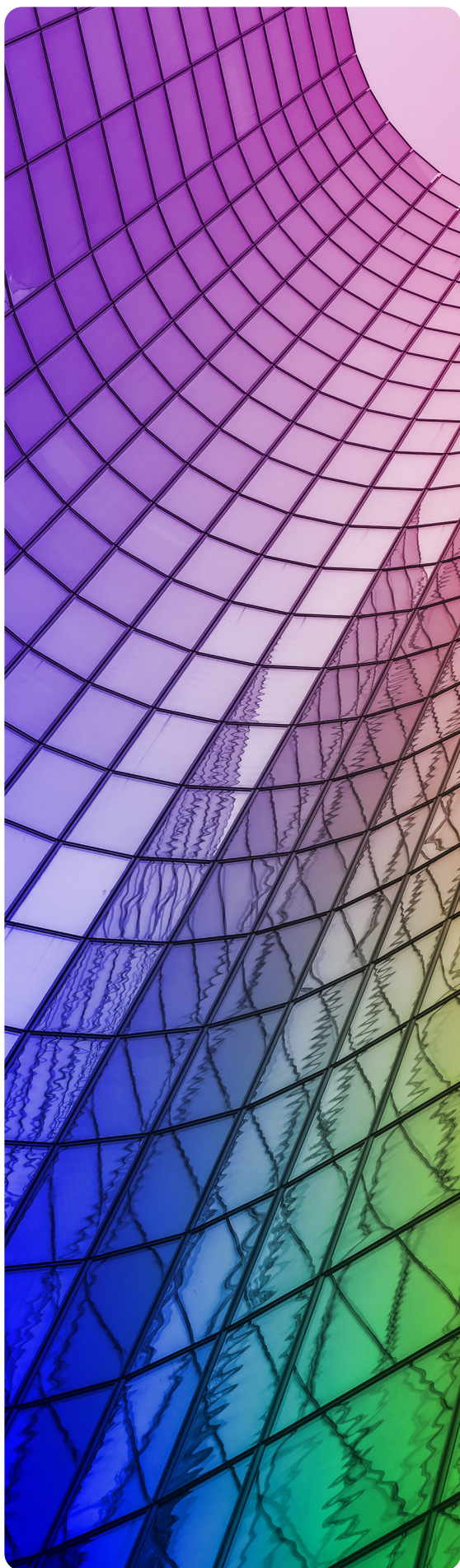
A brokerage's greatest asset isn't just its network—it's data. A report by Forrester Research found that **[data-driven companies grow more than 30% annually](#)** on average, and this principle holds especially true in commercial real estate. Every transaction you coordinate contains the essential information that, when properly managed, can become a source of insight, enabling the brokerage to close more business and gain a competitive edge in the future.

### Unlocking the **value of standardized data**

The real key to turning deal data into actionable insights lies in standardization. How transactions are documented, stored, and archived plays a critical role in delivering long-term value to your brokerage. If you can ensure consistency in the way deal information is captured, you create a resource that brokers, transaction coordinators, and decision-makers can use to succeed.







## From data to **competitive advantage**

Standardizing and archiving deal data doesn't just create a useful record; it establishes a strategic tool that helps your brokerage adapt, grow, and succeed in a competitive market. If you empower your team with a robust data infrastructure, you make it possible to:

- Support brokers with accurate, reliable insights during client meetings.
- Streamline operations with performance metrics tailored to your business.
- Stay ahead of local market shifts by anticipating opportunities and challenges.

Accurate data collection and management are not just “nice-to-haves”; they're essential for staying competitive.

## How **Manage & Close** helps leverage deal data



### **CLOSED DEAL ARCHIVE**

Create a searchable database of past transactions with detailed analytics—property type, pricing, size, and more. Manage and Close makes it easy to store and retrieve this data.



### **PERFORMANCE METRICS**

Use our reporting to assess team performance, spot bottlenecks, and refine processes.



### **MARKET INSIGHTS**

Manage and Close delivers local market data trends by analyzing deal cycles, pricing data, and key performance indicators.

With Buildout Manage & Close, your data becomes actionable intelligence that drives more informed decisions, competitive pitches, and long-term growth for your brokerage.





## CHAPTER 05

## Seamless workflow

### From transaction to market

At this point, we've outlined the common challenges and solutions in CRE deal coordination. But how can all these improvements come together? Enter Buildout Manage & Close, a solution that empowers your team to manage transactions with ease and clarity while ensuring every task is completed on time and without errors.

### Key features to expect

**PIPELINE CENTRALIZATION**

A visual dashboard to track every deal, from first contact to close.

**TASK AUTOMATION**

Templates for recurring tasks, reminders, and workflows ensure no deadlines are missed.

**SECURE DOCUMENT MANAGEMENT**

Every deal has its own digital folder for storing and sharing files.

**REAL-TIME REPORTING**

Generate financial and performance insights at the click of a button.

**INTEGRATION WITH MARKETING TOOLS**

Align the transaction process with the platform your brokers already use.

Buildout Manage & Close empowers CRE professionals to manage their processes efficiently, eliminate repetitive tasks, and reduce operational chaos.

While Manage & Close is a powerful tool on its own, its true value is unlocked when it operates as part of a connected ecosystem. The goal of a digital platform is not just to simplify one part of your workflow, but to unify the entire process. This is precisely why we've designed Manage & Close to work in tandem with our powerful marketing suite.



## THE COMPLETE BROKERAGE WORKFLOW

# Combining **Manage & Close** with **Showcase**

While Manage & Close transforms how you coordinate transactions, pairing it with Buildout Showcase takes your operational and marketing processes to the next level.

### HOW THE PAIRING WORKS

When Manage & Close is integrated with Showcase, your transaction management and property marketing platforms connect seamlessly. This integration creates a robust system that not only keeps transactions moving but also ensures that property marketing is flawlessly aligned with the deal lifecycle.

## Key benefits of the integration



### SEAMLESS DATA SYNCING

As brokers or coordinators update deal stages in Manage & Close, those changes are reflected in Buildout Showcase, ensuring that marketing materials such as property flyers, offering memorandums, and websites remain accurate and up-to-date.

Example: If a property under contract returns to the active listing pool, Showcase can automatically relist it with updated details, saving time and ensuring nothing is missed.



### ONE SOURCE OF TRUTH

With data flowing consistently between both platforms, brokers, support staff, and marketing professionals can all work from the same reliable data, reducing errors and unnecessary back-and-forth communication.



### ENHANCED COLLABORATION

Marketing teams can start preparing materials immediately as transaction details become available, ensuring that brokers always have the right collateral for client presentations, prospecting, or negotiations.



### FASTER MARKETING TURNAROUND

The integration reduces manual input, enabling marketing teams to deploy listings or email campaigns significantly faster. This means properties hit the market sooner, giving your brokerage a competitive edge.



### BETTER REPORTING & INSIGHTS

Combining the reporting capabilities of Manage & Close and Showcase offers a comprehensive view of both transaction and marketing data. It enables valuable insights, including time-to-market analytics, property performance trends, and pipeline forecasting accuracy.





## Why this pairing **benefits everyone**



### TRANSACTION COORDINATORS

Spend less time juggling emails & updates between brokers and marketing teams—your tools do the work for you.



### MARKETING TEAMS

Focus on creating stunning campaigns instead of manually updating redundant property listings.



### BROKERS

Use accurate, real-time marketing materials and benefit from a pipeline that moves faster than ever.



### THE BROKERAGE

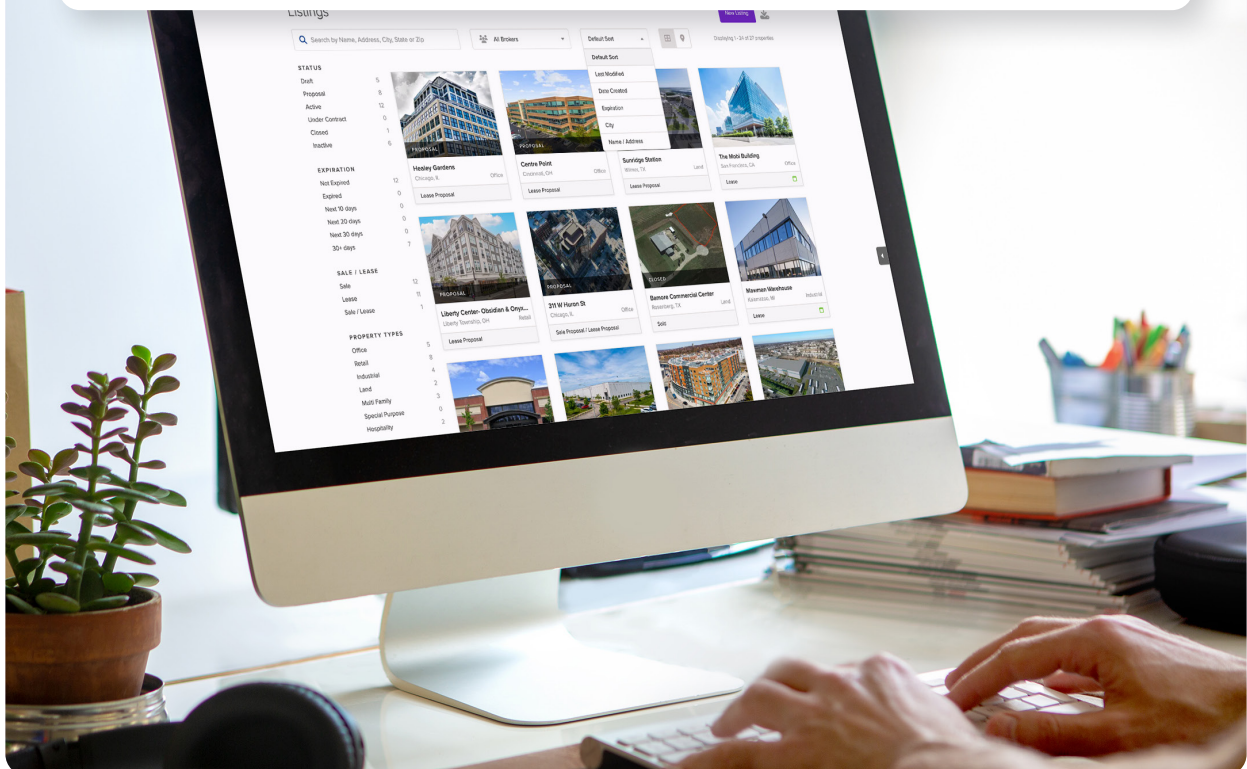
Gain a competitive edge with faster deal cycles, reduced inefficiencies, and unified branding across every property.

By pairing Manage & Close with Showcase, your brokerage transforms its processes into a cohesive, high-performing system that accelerates deals while maintaining professional-quality marketing throughout.

## Next steps with Buildout

If you're ready to take your brokerage to the next level, adopting Manage & Close is the first step toward simpler, more efficient transactions. Pairing it with Buildout Showcase amplifies these benefits, empowering every department while reducing complexity.

It's not just about closing deals. It's about creating a connected workflow where every piece supports the next. With both tools, your team is equipped to handle the challenges of today's market while setting the standard for tomorrow.





## CONCLUSION

# Empower your role, **empower your team**

Transaction coordinators, financial managers, and deal administrators are the unsung heroes of commercial real estate. Your work ensures that deals run smoothly, deadlines are met, and clients are satisfied. But the success of your role depends on having the right processes and tools in place to sustain efficiency and reduce errors.

With strategies like visual pipelines, automated workflows, and smarter data handling, you can enable your team to close deals faster with less chaos. Platforms like Buildout's Manage & Close give you the capability to centralize, optimize, and take control, making your work more impactful than ever.

The future of CRE isn't just in the hands of brokers; it's in the systems you create to support them. Let's make your processes as efficient and professional as the deals themselves. It's time to take control.

Don't wait to gain a competitive edge. Request a personalized demo of Manage & Close and Showcase to see how a unified platform can simplify your process and accelerate your business.

**BOOK A DEMO TODAY**