



A BUILDOUT OPERATIONS GUIDE

Running operations, not just patching them

CRE operations automation: the visibility leaders
have been missing





WHY IT MATTERS

Discover the **strategic potential** of your operations team

A brokerage's operations team should be the strategic command center.

You could be giving leadership a real-time view of commissions, deals, and revenue. You could be closing the books on time, every time. You could be the operations leader who anticipates cash flow issues before they hit, not the one chasing brokers for paperwork at month-end.

Instead, most CRE operations teams spend their week reconciling commission splits across spreadsheets, chasing brokers for deal updates, and stitching together reports from four different systems. The strategic work waits. The reactive work wins.

This guide will help you become a strategic operations leader, not by working harder, but by removing the manual handoffs between your tools so you can run the operations your brokerage actually needs.



DNA OF CRE INSIGHT | 2026

53% of CRE brokers don't use a dedicated deal management system, tool fragmentation being a top deal management challenge.





THE POWER OF AUTOMATION

One closed deal = **8 places** to update

You're the person who makes sure every closed deal gets accounted for, every commission gets paid correctly, and every report leadership asks for is accurate. When a deal closes, a broker pings you with the details. What looks like one update becomes a chain of manual work: logging the commission in the accounting system, calculating the split, updating the pipeline, generating the invoice, marking the deal closed in the CRM, refreshing the forecast, and pulling new numbers for the next leadership meeting.

When more than half of brokers don't have a single system tracking deals, you become the system. Every closed deal, commission split, and forecast update lands on you or your team to reconcile by hand. And when you're chasing down different email threads and excel sheets, you end up spending most of the day looking for the information rather than actually working it.

Connected tools change that math. The data flows from the deal closing through every downstream system on its own.



In most brokerages, these 6 steps are your job, multiplied across every broker and every closed deal. Each one is a chance for a missed commission, a delayed invoice, or a forecast that doesn't match what leadership saw last week. With a connected system, one entry creates momentum. Operations no longer have to feel like a bottleneck and instead start running the brokerage.

NO AUTOMATION		WITH AUTOMATION
You log the closed deal in the CRM, then re-enter it in accounting, then update the pipeline.	VS	One entry closes the deal across the CRM, the pipeline, and the financial record.
You manually calculate the commission split based on tier, deal type, and broker agreement.	VS	The split is auto-calculated from stored broker agreements and deal data.
You build the invoice in a separate tool, then chase signatures and payment status.	VS	The invoice generates from the deal record and tracks through to payment.
You rebuild the forecast in a spreadsheet every time a deal closes or shifts stages.	VS	The forecast updates in real time as deal stages change.
You pull deal reports from the CRM, then financial reports from accounting, then merge them by hand for leadership.	VS	Live dashboards combine deal pipeline, commission, and revenue data in one view.
You chase brokers for closing dates, signed agreements, and deal updates.	VS	Brokers update deal stages in the system, and the back office sees it instantly.



The hidden ceiling on **your output**

Here's what happens when you work off of disconnected tools rather than one connected system. **You're not just losing hours, you're losing the visibility and accuracy your brokerage relies on.**

	 THE PROBLEM	 THE COST
01 Reconciliation is its own job	Every closed deal lives in three places: the CRM, the accounting system, and the spreadsheet you actually trust. You spend hours every month making sure they match, and when they don't, you have to figure out which one is right. By the time the books close, you've spent more time reconciling than analyzing.	Half your month, gone to reconciling. The strategic work waits, every month.
02 The broker bottleneck	You can't close the books without deal updates, signed paperwork, and commission details. Brokers send them in pieces, over email, Slack, and texts, when they remember. Months close late because you're still chasing what should have been logged at close.	44% of brokers keep deal data in private databases. You can't reconcile what you can't see.
03 Every change ripples everywhere	A deal stage shifts. A commission split gets renegotiated. A close date moves. In a disconnected stack, that one update means hunting through every place the deal lives and fixing it by hand. Something always gets missed, and a broker shows up at the end of the quarter asking why their commission is short.	One change, six places to fix. Something always slips through.
04 Reporting becomes rebuilding	Leadership wants a view of pipeline, commission liabilities, and revenue trends. You pull from the CRM, the accounting system, and three spreadsheets, then merge them by hand. By the time the report is ready, the numbers are already stale.	By the time the report ships, the data has moved.
05 Operations over strategy, every time	When commission checks are due Friday and the operational efficiency project is due "eventually," the checks get done. The project doesn't. Reactive work crowds out the systems work that would actually grow the back office, because the reactive work has a name attached and a date attached and a broker waiting.	The deadline always wins. Reactive work crowds out strategy, every week.



From reacting to running: **Where to spend your time**

The work changes when automation handles the reconciliation, reporting, and routine updates. Here's what shifts:

FROM CLOSING THE BOOKS TO FORECASTING THE YEAR

Move from monthly catch-up to forward-looking financial planning.

- ▶ Build rolling forecasts leadership can act on, not just historical reports
- ▶ Model commission liability and pipeline value in real time, not at month-end

FROM CHASING BROKERS TO BECOMING THEIR STRATEGIC PARTNER

Become the operations partner brokers go to for deal structuring advice, not just paperwork follow-up.

- ▶ Help brokers understand the financial impact of how they structure deals
- ▶ Build self-service tools so brokers can see their own commission status

FROM REPORTING NUMBERS TO INFLUENCING DECISIONS

Use the data to recommend where to invest next, not just report what already happened.

- ▶ Bring leadership a point of view on pipeline health, commission trends, and operational costs
- ▶ Go from sending the report to being in the room when the decision gets made

FROM REPORTING METRICS TO INFLUENCING THEM

Stop fixing the same operational gaps every month and start building systems that prevent them.

- ▶ Document and automate the workflows your brokerage runs on
- ▶ Invest in the back office infrastructure that scales with broker headcount

FROM KEEPING UP TO GETTING AHEAD

Spend your week on next quarter's operational priorities, not this week's reconciliation.

- ▶ Tighten controls and audit-readiness before they're a problem
- ▶ Build the operational playbooks your brokerage will scale with, not just the reports it needs by Friday



SEE IT IN ACTION

Ready to run operations, not just patch them?

Book a demo and **see how Buildout makes it possible.**

[BOOK A DEMO](#)