



DEAL SPEED ASSESSMENT GUIDE

Ready to go from
tools to **workflow?**

Find out where you stand and what it takes to
operate as a leading CRE brokerage





We've all walked into two very different kinds of buildings. In one building, everything runs manually. Lights are controlled by separate switches. Temperature is adjusted floor by floor. Security systems run independently from access control. And if something needs to change, someone has to track down the right system to fix it.

Now walk into a modern building. The lighting adjusts automatically. The temperature balances across floors. Security, access, and building systems all run through a central platform.

The difference isn't the equipment. It's the system connecting everything together.

Commercial real estate technology has followed a similar path. For years, brokerages adopted tools one at a time from data platforms and CRMs to marketing software and spreadsheets, each solving a single problem but rarely working together.

The result? More software... but more manual work.

Brokers re-enter the same data multiple times. Marketing teams chase information across email threads. Deal updates live in spreadsheets that don't connect to anything else.

In many firms, the broker becomes the integration layer. But the most successful brokerages are moving toward a different model. Because in modern commercial real estate, the competitive advantage doesn't come from having more technology. It comes from having technology that runs the work.

That's the idea behind today's Buildout Tech Maturity Model. This tool highlights what is best practice for optimizing every stage of the deal process, from collecting data, to managing contacts, to prospecting, and finally, to closing. All in order to make you a strong leader.

Does this feel familiar? Buildout launched the Tech Maturity Model before. The challenge for 2026 is that the problem is no longer how much tech to pick (like food at a buffet)—it's how well everything works together. So here's the updated model to fit today's modern broker.



		UNSTRUCTURED	EMERGENT	STRATEGIC	LEADER
Data & Prospecting	Tech	Google, cold calls	Paid data sources, CoStar, Excel, some email marketing	Multiple paid data sources + CRM + cold calling	Data is aggregated in one tech + continually refreshed, built-in data source; AI assist
	Process	Limited, canvassing	Inconsistent time blocking, sporadic data checks	Organized cadence for research / updating data; CRM may have built-in dialer	Behind the scenes in the tech; data visualization; AI tells you who to call; data flows to CRM
	Insights	Limited / None	Manual	Automated	Predictive
Marketing Automation	Tech	InDesign or PowerPoint	Template tools; outside designers	Listing data automatically populates marketing materials, websites, and email campaigns	AI generates descriptions, updates listings, syndicates listings, and email lists
	Process	Reactive	Campaigns run ad hoc	Operate from a central system of record	Property data powers the entire marketing lifecycle
	Insights	Limited / None	Manual	AI assisted	Automated
Contact Management	Tech	Roladex + Pen & paper+ Sticky notes	Excel + Outlook / basic CRM	CRM	Relational CRM that powers entire brokerage workflow
	Process	None	Notes / update spreadsheets when remembered	Contacts are well organized; complete relationship view	AI surfaces contacts to engage based on listings, activity, and deal signals
	Insights	Limited	Manual	Automated	Predictive
Deal Flow	Tech	Email + notes + spreadsheets	Excel	CRM	Full lifecycle deal management connects pipeline, commissions, reporting, and tasks
	Process	Discuss in team meeting, follow-ups if remembered	Some lightweight repeatable systems	Can update deal stages in isolation and get taskreminders for deal activities	Clear deal milestones + Visibility into commissions statements + AI automates operational steps
	Insights	Limited / None	Manual	Automated	Predictive



TECH MATURITY MODEL

Data & prospecting

UNSTRUCTURED

Data lives everywhere—and nowhere.

Brokers rely on Google, scattered notes, and manual research to piece together property and ownership information. Prospecting is inconsistent, often driven by memory, inbox searches, or last-minute list building. There's no clear system for who to contact, when to reach out, or how activity is tracked. As a result, more time is spent gathering information than acting on it—and opportunities are often missed before outreach even begins.

EMERGENT

Data is accessible, but not actionable.

Brokers invest in data platforms and begin organizing information in spreadsheets or basic tools. Prospecting becomes more intentional, with time blocked for calls and email outreach. But the workflow is still manual—lists are built by hand, follow-ups are difficult to track, and insights are limited to what the broker can surface themselves. Data exists, but it doesn't move. And in a fast market, delays in acting on that data mean missed deals.

STRATEGIC

Data drives action—and the system does the work.

Brokers operate from a CRM that connects properties, contacts, and activity in one place. Prospecting becomes structured, with defined outreach processes, trackable interactions, and visibility into performance. Brokers can see who they've spoken to, what was discussed, and where opportunities are developing. This creates consistency and scale—but the system still relies on the broker to initiate the next step.

LEADER

Data drives action—and the system does the work.

In leading brokerages, data, prospecting, and outreach operate as one continuous workflow. Property data is automatically ingested and kept up to date. AI identifies likely sellers, surfaces high-priority opportunities, and generates curated call lists. Outreach is guided—or even executed—through built-in workflows, with follow-ups, tasks, and insights happening automatically.

Brokers don't spend time searching for who to call next.

They spend their time having the right conversations—while the system handles everything else.



TECH MATURITY MODEL

Marketing automation

UNSTRUCTURED

Marketing is manual, reactive, and time-consuming.

Brokers and marketing teams build materials from scratch using design tools, email platforms, and disconnected systems. Property details are re-entered multiple times across brochures, websites, and emails. Updates require starting over or chasing down the latest information. The process is slow, inconsistent, and heavily dependent on individual effort—turning every listing into a one-off project instead of a repeatable workflow.

EMERGENT

Marketing is templated, but still fragmented.

Teams introduce templates and standardized formats to speed up production. Brokers rely on marketing support or external tools to create materials and send campaigns. While output improves, the workflow remains disconnected—property data must still be updated in multiple places, and coordination between brokers and marketing teams creates delays. Marketing becomes more efficient, but not yet scalable.

STRATEGIC

Marketing is centralized and system-driven.

Brokerages adopt a platform where property data powers the creation of marketing materials. Listings, emails, and websites are generated from a single source of truth, reducing duplication and improving consistency. Marketing teams can move faster, and brokers gain more control over execution. The workflow is streamlined and repeatable—but still requires manual input to initiate updates and distribution.

LEADER

Marketing runs as an automated engine.

In leading brokerages, marketing is no longer a series of tasks—it's a connected system that executes the entire listing lifecycle. Property data is entered once and automatically flows through every output: documents, websites, email campaigns, and syndication channels. AI assists with content creation, while distribution happens instantly across platforms and audiences.

Listings don't wait on marketing to go live.

They're activated immediately—fully branded, fully distributed, and continuously updated—without manual effort.



TECH MATURITY MODEL

Contact management



UNSTRUCTURED

Contacts are scattered and difficult to act on.

Brokers manage relationships through inboxes, spreadsheets, and personal notes. Information is incomplete, outdated, or stored in different places depending on who last touched it. There's little visibility into past interactions, and follow-ups depend on memory rather than process. Relationships exist—but they're not organized in a way that consistently drives new opportunities.



EMERGENT

Contacts are stored, but not fully leveraged.

Brokers begin using basic systems like spreadsheets or entry-level CRMs to organize contact information. Data is more accessible, but still largely static. Notes, emails, and interactions may be logged, but turning that information into meaningful outreach requires manual effort. Follow-ups are inconsistent, and collaboration across teams is limited. The system holds information—but it doesn't actively support relationship-building.



STRATEGIC

Contacts are connected to deals, properties, and activity.

Brokers adopt a CRE-specific CRM that brings structure to their network. Contacts are tied to properties, companies, and deal activity, creating a more complete view of each relationship. Interaction history is visible, outreach can be tracked, and teams can coordinate more effectively. This enables more consistent follow-up and better pipeline visibility—but the broker is still responsible for deciding who to engage.



LEADER

Relationships are activated across the entire deal workflow.

In leading brokerages, contact management is no longer a standalone system—it's part of a connected data layer that spans prospecting, marketing, and deal execution. Every interaction, listing, and activity continuously enriches the network. AI surfaces the right people to engage based on real-time deal signals, property activity, and relationship history.

Outreach isn't driven by memory or manual lists.

It's triggered by the workflow itself.

Brokers don't "manage" contacts—they operate within a system where relationships are continuously updated, prioritized, and activated to move deals forward.



TECH MATURITY MODEL

Deal flow



UNSTRUCTURED

Deals are tracked manually and prone to gaps.

Brokers manage active deals through email threads, spreadsheets, and personal reminders. Key details live in different places, and progress is often discussed in meetings rather than tracked in a system. Follow-ups are easy to miss, timelines slip, and visibility is limited across the team. Deals move forward—but inconsistently, and often with unnecessary risk.



EMERGENT

Deals are tracked, but coordination is still manual.

Brokers begin using spreadsheets or lightweight tools to track deal stages, milestones, and potential commissions. There is more structure and some repeatable processes, but updates depend on manual input. Collaboration is limited, reporting is incomplete, and important next steps still rely on individual follow-through. The process is defined—but not enforced.



STRATEGIC

Deal flow is visible, structured, and coordinated.

Brokerages adopt a CRM-based pipeline that connects deals to properties, contacts, and activities. Stages are clearly defined, tasks can be assigned, and progress is visible across the team. Brokers and operations can track milestones, manage responsibilities, and maintain consistency across deals. This creates accountability and predictability—but still requires users to actively manage and update the system.



LEADER

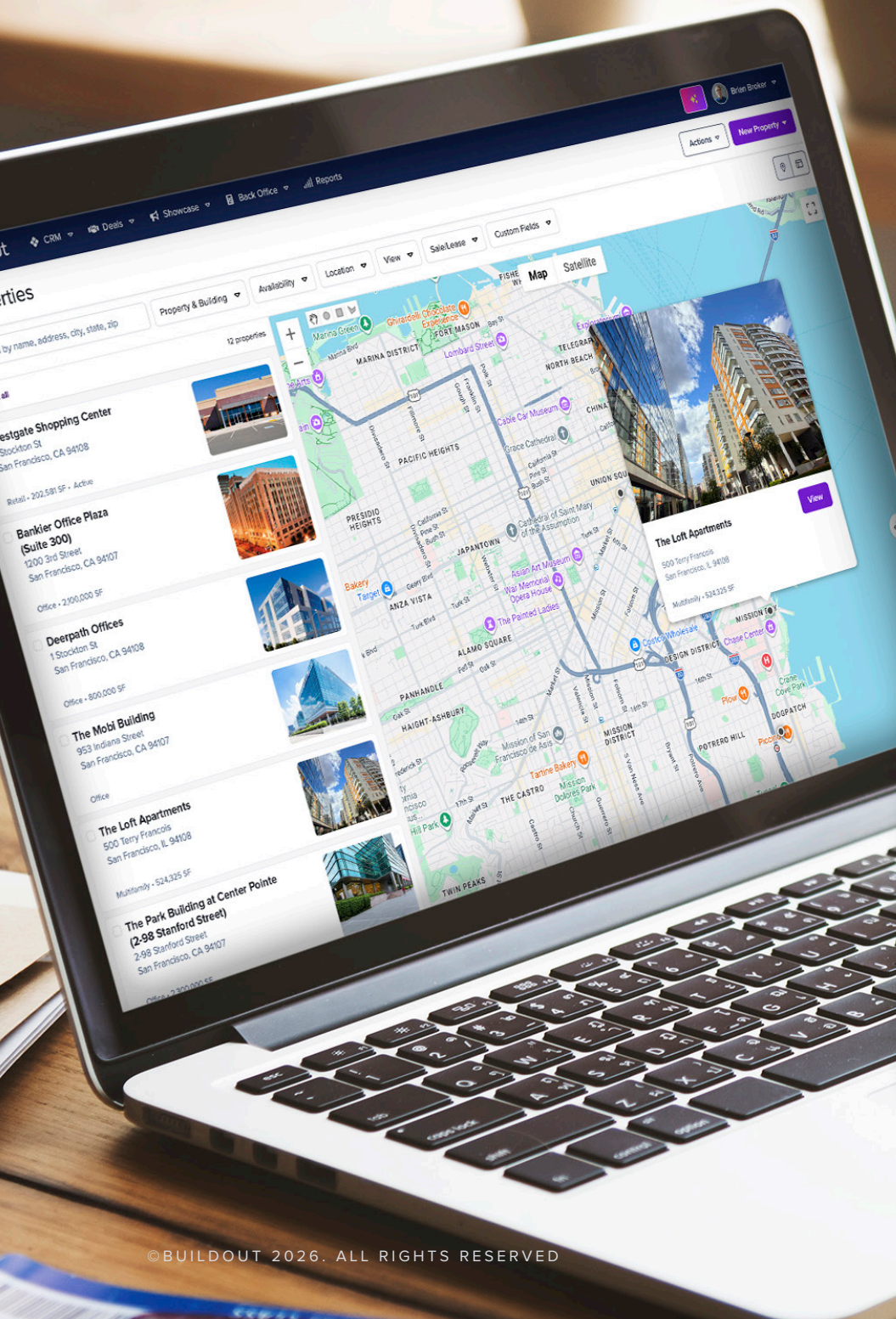
The deal runs on a system—not on manual coordination.

In leading brokerages, deal flow is fully integrated into a connected workflow that spans prospecting, marketing, and transactions. Every stage—from opportunity to close—is tracked, updated, and advanced automatically as data flows through the system. Tasks, timelines, and next steps are triggered without manual intervention. Financials, commissions, and reporting are always up to date.

The system doesn't just show where a deal stands.

It helps move it forward.

Brokers stay focused on relationships and negotiations, while the platform handles coordination, execution, and visibility across the entire lifecycle.



Every brokerage operates in a **different kind of building.**

Some are still flipping switches—managing data, marketing, contacts, and deals in separate systems that don't quite connect. Others have started to modernize, adding structure and improving visibility. But the most advanced brokerages don't just upgrade individual tools, they run on a fully connected system, where everything works together seamlessly behind the scenes. Because reaching the leader stage isn't about adopting more technology. It's about understanding how the entire operation is designed to function as one.

That's where the throughline becomes clear. Data & Prospecting finds the opportunity. Marketing Automation activates it. Contact Management connects the relationships. Deal Flow executes and closes. When these stages are connected, the system starts doing the work, information flows automatically, teams stay aligned, and deals move forward with less friction. The result isn't just efficiency. It's a brokerage that runs like a modern building—intelligent, coordinated, and built to perform.

If you're ready to move from unstructured to a fully connected workflow leader, Buildout can help you get there. See what it looks like to operate at the leader level where your data, marketing, relationships, and deals all work together, and the system handles the work behind the scenes.

Request a demo and start building a brokerage that runs itself.

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