buildout

Growth engine
checklist

How to **use** this checklist
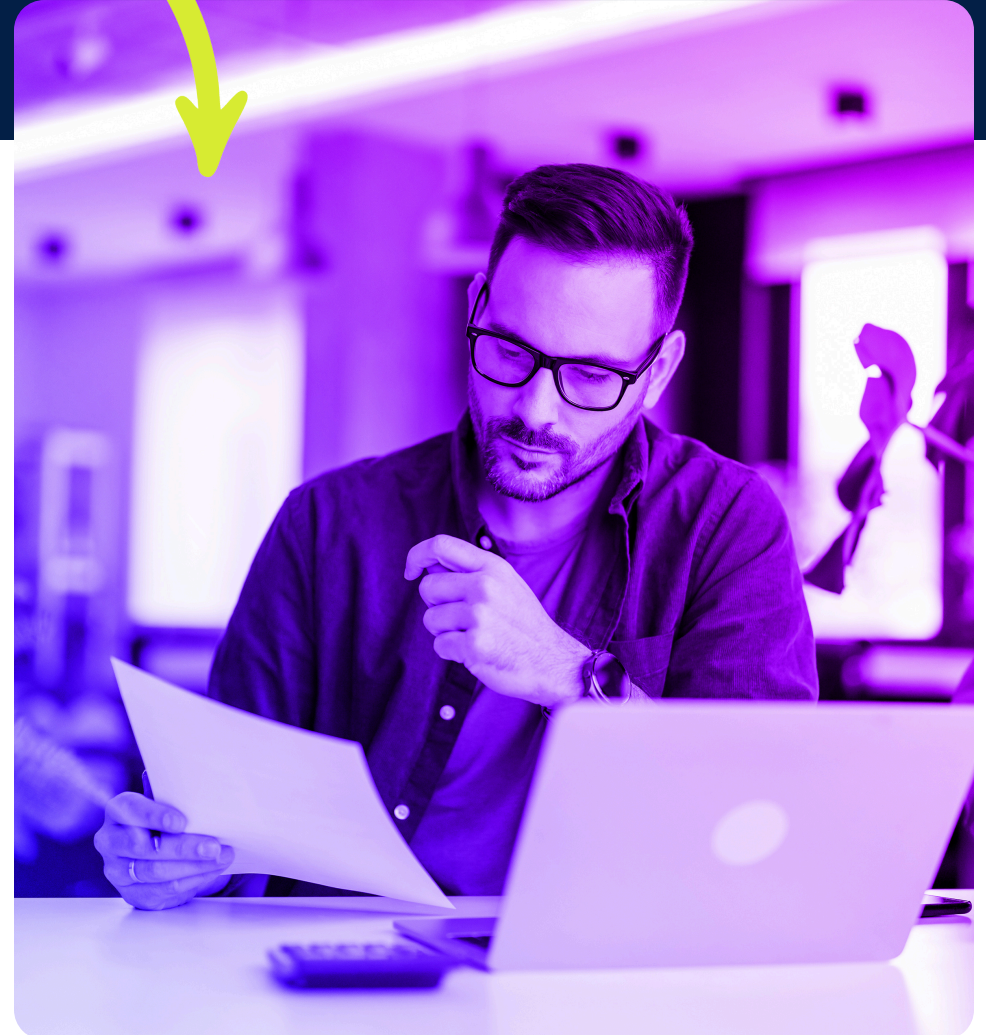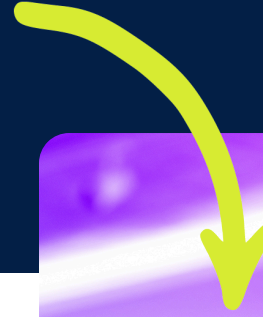
THE RIGHT CRM MAKES ALL THE DIFFERENCE

Are you searching for a CRM that not only enhances your efficiency but also drives your business growth? Look no further. Here are the essential features your CRM should off to streamline your operations and boost success.

GOOD MARKETING JUST HITS DIFFERENT

Are you on the hunt for a marketing partner that not only boosts your earnings but also frees up your valuable time? Here are a few things your marketing tool should check off your list.

UNLOCKING THE GROWTH ENGINE

Key needs in CRE for seamless integration of CRM and marketing automation tools designed to capture, nurture, and engage every lead efficiently.

What is the ultimate **goal?**

Before you dive into anything new, it's important to reflect on what obstacles you've encountered previously that led you to seek out a new CRM system. Determine the primary goals you want to achieve with the CRM (e.g., improving client relationships, increasing sales efficiency) and then set clear objectives.

▶ Contact **management**

☐ Seamlessly organize and track all your client interactions, ensuring you never miss a beat and can nurture relationships effectively.

☐ Centralize database to store all costumers information, making it easily accessible to your team.

☐ Advanced search and filtering options to quickly find specific contacts or groups.

▶ AI **capabilities**

☐ Leverage advanced AI tools to gain predictive insights, automate routine tasks, and personalize customer interactions for better engagement.

☐ Machine learning algorithms that improve over time, providing more accurate predictions.

☐ AI that you can tailor to match your tone of voice, ensuring consistent and brand-aligned communication.

▶ Email **integration**

☐ Email communications sync directly with your CRM, ensuring all your client interactions are logged and easily accessible.

☐ Email templates and scheduling features to save time ensure consistent communication.

☐ Tracking and analytics to monitor email performance engagement.

CRE specifics **matter**

Other CRMs use one address per contact, but what if an investor has properties across multiple cities? Or consider a strip mall with multiple tenants and staggered lease expirations—a reason to call the owner. Adding custom fields helps, but generalized CRMs can't handle this kind of complex relational data, making them fall short for brokers when there are solutions such as Rethink CRM that can handle it.

▶ Task **management**

☐ Streamline your workflow with built-in task management tools that help you prioritize and track the progress of your activities.

☐ Task delegation features to assign responsibilities and monitor completion.

☐ Automated reminders and alerts to ensure nothing falls through the cracks.

▶ Reporting & **analytics**

☐ Access comprehensive reports and analytics that provide actionable insights, helping you make data-driven decisions optimize your strategies.

☐ Customizable reports to focus on the metrics that matter most to your business.

☐ Real-time data visualization to quickly identify trends and opportunities.

GENERAL CRMS

COMMERCIAL REAL ESTATE CRM RECORDS
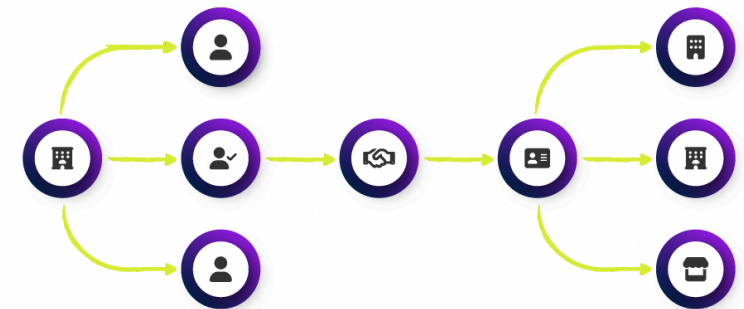
Why be good, when you can be **great**

"I looked at a bunch of competing platforms and I had one resource that was entirely free to me at KW commercial and it just didn't meet the parameters I needed and I knew that Buildout [Showcase] was a platform... I can customize and have it fit my needs."

– REGAN CHERRINGTON
BROKER - KW COMMERCIAL

SHOWCASE PUT US ON THE MAP

Fun fact, almost 15 years ago, Buildout started off solving for the marketing efficiencies for brokers.

CUSTOM PAGE TEMPLATES

- [ ] Tailor-made templates that align with your brand, ensuring consistency and a polished look across all your marketing collateral.
- [ ] Easy-to-use drag-and-drop interface for quick customizations.
- [ ] Responsive designs that look good on both desktop and mobile devices.

BROCHURES & FLYERS

- [ ] Professionally designed materials that captivate your audience and convey your message effectively.
- [ ] Customizable designs to match your branding and specific campaign needs.
- [ ] High-quality print and digital options to cater to different channels.

AI CAPABILITIES

- [ ] Advanced AI tools that optimize your marketing strategies, from personalized content creation to data-driven decision-making.
- [ ] Predictive analytics to identify opportunities.
- [ ] AI that you can tailor to match your tone of voice, ensuring consistent and brand-aligned communication.

LISTING LANDING PAGES

- [ ] Dedicated landing pages for your listings that drive engagement and conversions by showcasing your properties in the best light.
- [ ] SEO-optimized to improve visibility.
- [ ] Interactive elements like virtual tours and 3D renderings.

EMAIL MARKETING SERVICES

- [ ] Comprehensive email solutions that nurture leads, maintain customer relationships, and promote your offerings directly to your target audience.
- [ ] Automated email workflows to save time and ensure timely communication.
- [ ] Detailed performance analytics to track open rates, click-through rates, and conversions.

Key CRE features when you expect a **growth engine**

FLEXIBLE DATA FLOW OPTIONS

The integration supports both bi-directional and one-directional data flows, allowing teams to customize data transfer based on specific needs.

COMPREHENSIVE DATA MAPPING

Standard fields are automatically mapped between systems, with the option to support certain custom fields for added flexibility.

ENHANCED DATA SYNCING

Listing and lead data sync immediately, while space and comp data refresh in scheduled batches, ensuring timely updates without overloading the system.

IMPROVED LEAD MANAGEMENT

Leads now flow directly into the Deal Pipeline, streamlining deal creation by linking leads with deals rather than just properties.

REAL-TIME VISIBILITY ON KEY UPDATES

Users gain insights into recent changes through Showcase, focusing on only the most relevant updates to keep brokers informed.