



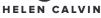
Commercial real estate has always been a game of relationships, intuition, and strategy. Deals were forged over handshakes, nurtured through trust, and sealed with expertise. But let's be honest—the last few years have changed the rules. Today, the brokers who win are those who embrace both human ingenuity and cuttingedge technology. Now more than ever, success in CRE is both an art and a science.

At Buildout, we've spent over fifteen years studying what makes brokers thrive. Our annual DNA of CRE survey has uncovered the evolving patterns of prospecting, marketing, and deal-making, providing brokers with the insights they need to stay ahead. The big takeaway? Winning brokers are perfecting the playbook of tech powered efficiency, punctuated in the exact right areas with human touch. When to do what, is the secret sauce.

This white paper isn't just another industry think piece. It's an actionable guide for brokers looking to navigate a rapidly shifting market. We'll break down how to build trust, make data-driven decisions, and leverage the right tools without losing the personal connections that drive this business.

We're proud that commercial real estate continues to stand out as being broker-led. But in 2025, the smartest brokers are ensuring they're tech-enabled. That, the art and the science, is the winning combination.

LET'S DIVE IN.



CEO, Buildout

Table of contents

04

01

The state of CRE in 2025

06

02 | THE ART

Human behavior in CRE success

03 | THE SCIENCE

Technology as a catalyst

18

04

The intersection of art and science

05

The blueprint for 2025 success









The CRE landscape is shifting faster than ever coming out of a two-year industry slog. We've seen the rise of hybrid work and interest rates alike all the while working diligently towards some sort of balance just to have new wrinkles pop up in our strategies.

It's been challenging to say the least, but there's renewed optimism around us. From tech adoption to changing client expectations, brokers are rewriting the rules. Here's what the data tells us:

Rapid Changes in CRE—Optimism is High

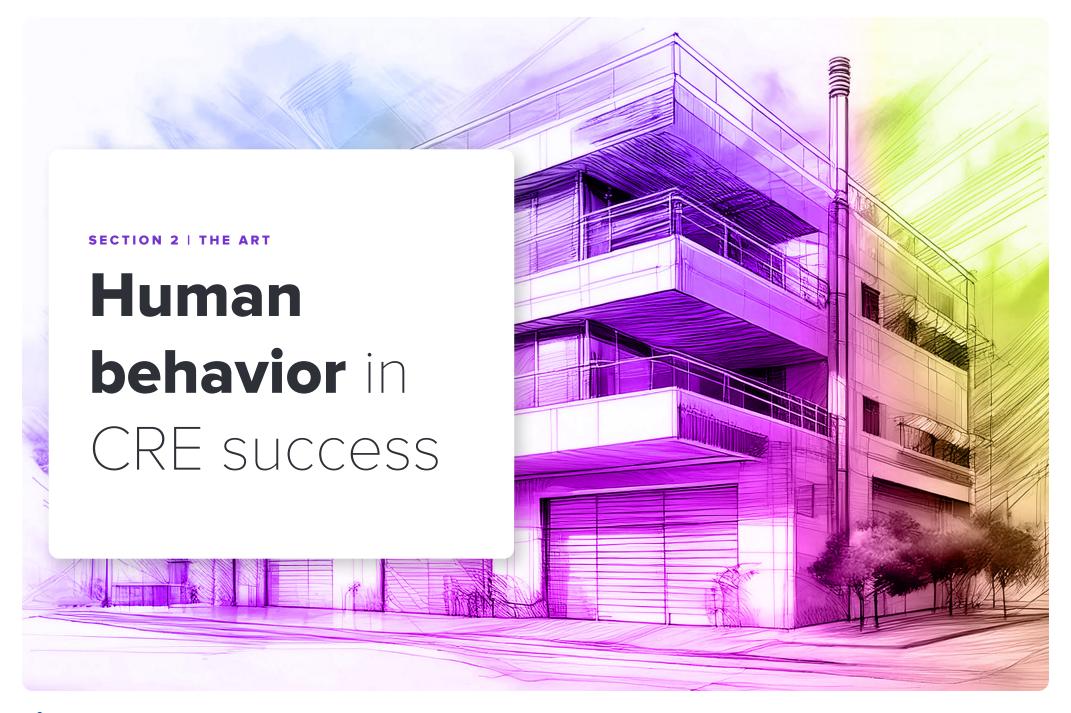
Our recent **DNA of CRE** report showed that the majority, a whopping 76% of CRE professionals, are still optimistic about the future. And that's great news considering that sentiment is coupled with a rising interest in adopting emerging technology such as Al chatbots which saw a 10% jump in usage from last year's data. Other digital tools are on the rise with increased use or planning to use within two years of social media,

analytics and CRM. As we see it, tech is trending high when there's more optimism in business and business potential.

But not without challenges...

But you know what they say, in some cases the more things change, the more they stay the same. A majority of brokers say that relationships and people are still at the cornerstone of their strategies with seventy-four percent agreeing it's the most important driver of new business, something that's been consistent throughout the last ten years. The challenge for most is finding the right tools that allow them to focus on the driving force behind their business; those relationships.

The takeaway? Success requires embracing both the timeless (relationships) and the timely (tech). Let's break it down.





Why people still matter more than platforms

Just having the fanciest tech stack doesn't mean that you have all the right tools for success. Let's be crystal clear: without human touch, even the most sophisticated platforms are like Ferraris without fuel—impressive, but going nowhere fast. It's the people, their connections, relationships and trust that fuel a company's success. Redefining the CRE sales playbook is defining the harmony between the human power—or as how Buildout says it, broker-led success. This whole section explores how the CRE industry is harnessing the art of human behavior.



TOP METHODS BROKERS USE TO WIN NEW BUSINESS

your gateway to CRE success

Trust & relationships

In the competitive commercial real estate (CRE) environment, trust and relationships stand as the foundation upon which thriving businesses are built. Our 2025 DNA of CRE survey revealed that an overwhelming 74% of brokers rank the cultivation of relationships as the top driver for securing new business. This emphasis highlights a key point in the CRE sales strategy — building strong connections is essential, not just beneficial. Close behind in importance, personal reputation is vital for attracting clients and opportunities, with 69% of professionals agreeing. Once trust is established through consistent expertise and integrity, it draws both enterprises and investors. Market expertise also plays a crucial role, noted by 52% of professionals, as it helps to build trust and strengthen relationships, while enhancing one's reputation. By combining trust with strong relationships, one can effectively navigate the CRE market, turning strategies and connections into results.









Behavioral insights in

decision-making

Don't underestimate the secret sauce of top brokers; emotional intelligence (EQ). EQ isn't just about reading emotions; it's about using that information to guide interactions and build stronger connections. Here's how top brokers leverage EQ in their day-to-day work:



ACTIVE LISTENING

Great brokers listen more than they talk. By focusing on what clients say (and don't say), they uncover hidden motivations and concerns.



EMPATHY IN ACTION

Empathy helps brokers see the deal from the client's perspective, making them feel heard and valued—two keys to building trust.



ADAPTABILITY

Clients come in all types, from data-driven analysts to big-picture visionaries. Successful brokers adjust their communication style to meet the client's needs, whether it's diving deep into financials or painting a vivid picture of possibilities.

These aren't theories—these are proven strategies witnessed in the trenches, leveraged by successful brokers who turn behavioral cues into closing cues.

DON'T JUST TAKE OUR WORD FOR IT:

"Commercial real estate may seem focused on buildings and deals, but it's really all about the people and the connections we make. Being there for your clients consistently, ready to support them however necessary, is crucial. For example, I had a client hit a financial snag on a deal we had under contract. He reached out for advice and we worked together to find a funding solution that allowed him to secure the property he wanted. Challenges can always arise, but my client knew he could trust me to find a way through. It's about more than transactions; it's about being a trusted advisor, a dependable expert, and a friend they can rely on."



AJ STANFORD
Buildout Account Executive
former CRE broker

Engagement

Techniques

As you evaluate your own CRE playbook, take into consideration where your engagements play a critical part to staying connected. From what we can determine, repetition plays a part. Call it consistency or call it persistence; either way, it's about making those connections stick. Regular check-ins through phone calls (68%) and face-to-face meetings (68%) are non-negotiables for solidifying bonds.

What we recommend to help stand out from the pack, is ensuring you have your personal spin. Mastering personalization is not just an art; it's a strategy and how do you get the job done? With these tactics.

In the world of CRE, success isn't a solo act—it's about human connections and understanding that at the end of every transaction is a handshake, a smile, and a relationship that stands the test of time. When you master the art of human behavior, every handshake is the beginning of endless possibilities.



Mirror and Match

It's subconscious, it's subtle, but by mirroring a client's demeanor, you're building bridges before they even know they want to cross.



Anticipate Objections

The canny broker knows the path may have bumps; they smooth it out ahead of time, showcasing their resourcefulness and foresight.



Build a Vision

Beyond the ink on the contract, you aim to be the architect of your client's future, dovetailing deals into their grander life blueprint.

Behavioral science in action

Think about it: Every phone call, handshake, and coffee meeting builds a foundation of trust. It's why relationships lead to referrals, which account for a whopping 78% of opportunities. Here are three scenarios to put behavioral cues into action:

EXAMPLE 01

Reading the Room to Win a \$5M Listing

A top broker in the Midwest faced stiff competition for a \$5M industrial property listing. During the pitch, the client's body language signaled hesitation—crossed arms, averted gaze—but the broker picked up on subtle shifts when discussing their expertise in navigating zoning challenges. Sensing an opening, they pivoted, diving deeper into how their solutions could address these specific concerns. By the end of the meeting, the client was leaning in—literally and figuratively—and signed on the dotted line the next day.

EXAMPLE 02

Empathy Seals the Deal on a \$2M Retail Property

During a meeting with a first-time property seller, a broker noticed their client's nervousness about the selling process. Instead of overwhelming them with market data, the broker took a moment to share a story about a similar client's journey and how they navigated their first sale. By humanizing the process and showing empathy, the broker eased the client's fears and won their trust—and the listing.

EXAMPLE 03

A Collaborative Approach Closes a \$3M Investment Deal

When pitching to a corporate investor, a broker noticed the decision-maker repeatedly mentioning "team consensus." Recognizing this as a priority, the broker shifted focus to a collaborative approach, offering to host a workshop for the investor's team to discuss potential opportunities. This tailored engagement strategy not only impressed the client but also expedited the decision-making process, leading to a swift deal closure.





How **tech** continues to transform CRE

Technology isn't just nice to have—it's table stakes. While the personal touch might seal the deal, it's the tech that gets you there faster and smarter. Today's brokers are harnessing new tools to streamline their workflow and amplify their efficiency, seeing remarkable results along the way.

Tools like **Rethink CRM** revolutionize how brokers track client interactions, ensuring they tailor their approach to each individual's preferences. Imagine knowing exactly what your client wants before they have to tell you—that's the power of these tools. Meanwhile, real-time insights from platforms like **Showcase** let brokers see how clients interact with marketing materials, empowering them to make the perfect pitch at the perfect time.

By blending emotional intelligence with strategic engagement techniques, brokers aren't just selling properties—they're building relationships that last long after the deal closes. And in CRE, that's where the real art lies.

Tech trends transforming CRE

Al: The Assistant You Didn't Know You Needed

From drafting emails to creating engaging social media content, Al is reshaping the brokerage landscape, allowing realtors to focus on what they do best: selling. It's why we, in jest, say that AI is the assistant you never knew you needed. Check out Buildout Showcase's AL. We began to include Al questions into the DNA of CRE only in recent history and the takeoff rate is staggering. In publishing the survey findings, Mark Duclose, SIOR, the President of Sentry Commercial, highlighted an intriguing point regarding Al adoption among survey participants, questioning, "With 31% planning to implement Al tools within the next two years, one has to wonder, 'What are they waiting for?" Seeing these results here, what would cause 31% to wait?

CRM: Your Deal-Tracking Sidekick

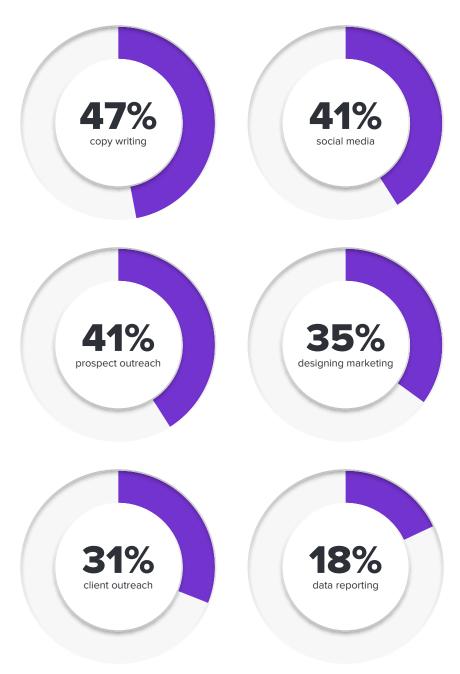
With a significant surge in adoption rates, tools like Buildout CRM solutions are proving indispensable with a 27-37% adoption rate. Why? Because it makes tracking deals, organizing leads, and managing client info a breeze.

And those aren't all the benefits you can expect from the tool. Seventy-four percent of businesses say their CRM gives them improved access to client data and 47% of businesses say it has a significant impact on client retention.

Marketing Tech: Your Not-So-Secret Weapon

As nearly half (49%) of the brokerages plan to up their marketing tech budgets, it's clear: tools for listing syndication, automated marketing, and analytics are becoming essential for staying competitive.

TOP WAYS BROKERS LEVERAGE AI DAY-TO-DAY



EMERGING TOOLS AND THEIR IMPACT

Al and its transformative role

Al adoption in CRE is skyrocketing, with 47% of brokers using it for marketing copy, 41% for email drafting, and another 41% for prospecting. Here's how Al is transforming these critical workflows:



MARKETING COPY THAT CONVERTS

Harness the power of AI to revolutionize your marketing copy by analyzing what makes your messaging effective. our copy now has the muscle to not only catch the eye but clinch the deal.



EFFORTLESS EMAIL OUTREACH

Streamline your email outreach with AI, perfecting every last detail, from razor-sharp subject lines to content that feels like a one-on-one conversation. This isn't just timesaving; it's relationship-building at scale.



SMART PROSPECTING

When it comes to identifying the hottest leads, trust in data. All lays out a roadmap, pointing directly to those prospects eager to sign on the dotted line. Brokers, it's time to zoom in on the opportunities that promise the highest returns.

It's essential to recognize that AI, as groundbreaking as it is, is still in its evolutionary stages. While it streamlines operations and offers unparalleled insights, it's not foolproof. The initial programming of AI can introduce inherent biases that might skew its outputs. It's crucial to pair AI's cutting-edge capabilities with the irreplaceable depth of human judgment. Remember, using Al is like wielding a powerful tool—it greatly enhances performance, but the strategic direction must be guided by your expert insight and real-world experience.





Imagine having the ability to not just gauge the market as it stands but to anticipate shifts before they happen. This isn't the stuff of fantasy; it's the reality for brokers who are leveraging advanced analytics. Here are some of those ways:

Spotting Trends: Predictive analytics help brokers identify market shifts before they happen, giving them a head start on opportunities.

Optimizing Strategy: By analyzing property performance, marketing effectiveness, and deal timelines, brokers can fine-tune their approach to maximize outcomes.

Custom Reporting: Tools like Buildout's analytics module offer intuitive dashboards that translate complex data into actionable insights, helping brokers make informed decisions with ease.

Ninety two percent of businesses believe that CRM software plays an important role in achieving their revenue goals. It offers unparalleled advantages in revenue tracking, team collaboration and data management. If you're trying to run your business on spreadsheets then you know how difficult and stressful it can be to find what you need quickly. Having the right tool can propel your business to next levels and respondents from our DNA of CRE survey agree.

Sixty-four percent of brokers are already using CRM software and interest is on the rise with another 20% looking to adopt the technology within the next two years.

Long story short...

Embracing emerging technology opens up untapped potential for brokers, allowing them to exceed their own expectations and those of their clients. The real magic happens when you combine the precision of technology with the human touch of CRE. Al simplifies marketing and outreach, analytics optimize strategy, and a robust CRM keeps everything on track. Together, these tools empower brokers to work smarter, not harder—because in a competitive market, efficiency and expertise aren't just advantages; they're necessities. After all, in a market that never stands still, staying ahead means staying innovative.



LAST SECTION





Here's the secret: It's not about choosing between human connection and technology. It's about striking the right balance to create a sales playbook that's greater than the sum of its parts.

HOW TO MARRY THE TWO

Build trust with data

Show clients that you're not just personable but also informed. Use analytics to back up your market expertise.

Automate the boring stuff

Leverage AI to handle repetitive tasks like email drafting and data entry, freeing up time for relationship-building.

Streamline your workflow

Tools like Buildout let you enter property data once and use it across proposals, listings, and more—no more double entry or missed details. This is a critical part to optimizing your sales playbook by integrating behavioral insights with tech-driven workflows to build trust and credibility.

Metrics-driven creativity

How brokers combine metrics (e.g., transactions, total commissions) with creative strategies to drive results.

CASE STUDY

Winning with both art and science

Easier said than done? Not really, and here at Buildout we're loaded with examples of top CRE experts leading the charge. Take Allen C. Buchanan, who used Buildout to secure top-dollar listings and sell a multimillion dollar investment property.

Allen Buchanan, a top producer at Lee & Associates Orange since 1984, knows commercial real estate like the back of his hand. But even pros need the right tools. Before Buildout, his brokerage's marketing process was a mess—manual, inefficient, and sometimes nonexistent. One teammate even spent half the day just sending e-blasts.

Buchanan wanted better. He needed a tool to streamline proposals, manage critical documents, and free up time for actual deal-making. Enter Buildout.

The ultimate test? A high-stakes call from a property owner needing a same-day proposal. No support staff. No time to waste. But with Buildout, Buchanan whipped up a slick, professional pitch that won him a \$4 million listing—later selling for \$5 million. The happy client came back for another \$6.5 million deal.

Now, instead of drowning in marketing busywork, Buchanan and his team use Buildout to automate, organize, and impress—securing more listings and closing more deals. All the while, giving them the time to nurture the right relationships and be ready for those critical phone calls.

Because in commercial real estate, it's a blend of art and science to win.

DON'T JUST TAKE OUR WORD FOR IT:

Bo Hamrick, Buildout's VP of Sales, highlights the importance of balancing art and science in commercial real estate. "Consider the difference between quickly asking a client question after question versus taking the time to really talk and listen. The first is methodical, it feels like an interrogation, but the second—that's where you build a real bond," Bo explains. He shares that while you can't ignore the practical side of things—you talk to heaps of people, a few bite, and you might get one solid meeting—you also can't forget the personal touch. "In CRE, it's about getting both the numbers and the relationship right. When you do, that's when you truly excel," he says. "Forget one, and you lose your edge. Combine them, though, and you boost not just your performance but also the enjoyment of the job."



BO HAMRICKVice President of Sales





CRE is a blend of art and science, heart and hustle, people and platforms. To succeed in 2025, you need to master both. By blending behavioral insights with tech-driven efficiency, you'll not only redefine your sales playbook—you'll rewrite what it means to be a top broker. If redefining your CRE sales playbook was on your bingo card for the year, use the following as critical planning questions as well as sections worth building into plan.

ACTIONABLE QUESTIONS

01

How do you plan to leverage Al for repetitive tasks and freeing time for relationship-building?

02

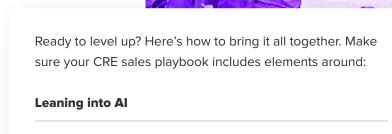
Have you considered adopting integrated platforms (such as Buildout) for streamlining marketing and data insights? If not, what is holding you back?

03

What are your strengths when it comes to emotional intelligence? What are the areas you can lead harder into?

04

What are your strengths when it comes to navigating new tech? Do you have team members to help fill gaps or do you need more of a tech partner?



Automate your outreach and marketing to focus on highvalue activities. <u>Click here</u> for the on-demand webinar on the '5 Ways Brokers are Leveraging Al'

Double down on relationships

Use your extra time to connect with clients in meaningful ways. Looking to start a referral program? We have the building blocks for **that here**.

Invest in integrated platforms

Buildout's suite of tools eliminates silos and keeps your team on the same page. We call this your "growth engine."

Click here to get your checklist on building yours.



