



SUCCESS STORY

Lee & Associates broker secures \$4 million listing with Buildout

THE GOALS

- » Create marketing materials more efficiently
- » Streamline the chain of custody of documents

THE APPROACH

- » Onboard Buildout to quickly draft proposals, emails and other marketing collateral with document automation and improve document access

THE RESULTS

- » Secured \$4 million dollar listing (that sold for \$5 million)
- » Secured \$6.5 million dollar listing
- » Implemented simple, secure way to share important sale documents
- » Reallocated team resources to drive more revenue

WEBSITE

LEE-ASSOCIATES.COM/ORANGE

LOCATION

ORANGE, CALIFORNIA

FOUNDED

1983



Allen Buchanan is a principal with Lee & Associates Commercial Real Estate Services in Orange, California. He's been with the firm since 1984 and became a shareholder in 1988. Allen specializes in owner and user representation and investment sales, and he writes a blog focused on location insights for owners and occupants of industrial buildings in Southern California.

Buchanan has been continually recognized as a Top Five Producer of the Lee & Associates Orange office over his years at the firm.

And he uses Buildout to secure top dollar listings.

The opportunity

Prior to implementing Buildout, brokers at Lee & Associates created marketing materials manually, if at all. Sometimes, they were forced to miss opportunities altogether due to the hassle of creating proposals and other materials. And efficiency was limited—one team member spent half of every workday manually sending e-blasts to promote listings.

Buchanan started looking for a tool that would make material development more efficient.

He also wanted a solution that would streamline the chain of custody of documents like phase 1 environmental reports, escrow instructions, building inspections, title reports, fully executive sales agreements and more.

When he saw Buildout, he quickly recognized that the tool could help his brokerage secure even more business and he made the decision to onboard.

Buildout brings professionalism in less time

One morning, Buchanan got a call inquiring about his ability to represent an owner for a major property. The challenge: the prospective client wanted to meet that same day and there was little time to prepare.

There was no support staff in the office that day to help Buchanan create a proposal. He was on his own. But because his brokerage had Buildout, he was able to complete a polished, professional proposal in time for his important meeting. In fact, the proposal was so impressive that it helped Buchanan win the \$4 million listing, which later sold for \$5 million. And because the client was so happy with Buchanan's responsiveness and service, they chose to work with him again on another \$6.5 million listing.

After they began using Buildout to create listing emails, Buchanan and his team reallocated the hours they previously spent sending e-blasts to other tasks that have a more direct impact on revenue. The brokers at Lee & Associates have also started using Buildout's vaults to share important forms in a secure, sleek and simple way.

Buildout has streamlined a wide variety of marketing and material creation tasks for Buchanan the rest of the team at Lee & Associates, helping them win more listings and close even more deals.

Don't miss out on valuable opportunities for your brokerage. Use Buildout to draft professional, customizable proposals, send emails and create marketing materials in a fraction of the time.

Buildout is a marketing tool for the whole brokerage. It produces and publishes custom materials and streamlines the entire property listing process. With Buildout you can market and manage all of your CRE listings from one centralized place, saving you time to focus on more important things.

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