

THE RECURRING WORK AUTOMATION REMOVES

What we take off your plate.

Commercial Brokerage

Every business has a set of tasks that repeat forever. None of them are hard. All of them have to happen. And every one competes with the work that actually earns money.

Commercial brokerage runs on timing. A tenant rep assignment is won well before the lease expires, a listing is won around the time an owner's loan comes due or a hold period ends, and both go to the broker who was already in the conversation. The expiration and maturity data sits in CoStar, a comp database or a spreadsheet, and the follow-up sits in one broker's memory. About \$875 billion of commercial and multifamily mortgages, 17% of the \$5.0 trillion outstanding, was scheduled to mature in 2026 (MBA). Investment volume rose 21% in the first half of 2026 to \$250.3 billion (CBRE). Every one of those maturities and trades is a conversation some broker started early. Meanwhile the deal already signed carries its own dates (due diligence end, deposit going hard, estoppels, rent commencement, renewal-option notice) that live in one person's spreadsheet.

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The Expiration-to-Close Engine

Every lease expiration, loan maturity and hold period on a clock, and every deal date watched to close

RECURRING TASK	HOW OFTEN	AUTOMATE?	WHAT CHANGES
Respond to LoopNet, Crexi, website and sign-call inquiries	Every inquiry	Full	Reply in under 60 seconds; routed to the listing broker or relationship owner.
Know which leases expire and which loans mature	Weekly	Full	The radar turns dates into dated prospecting tasks at the broker's windows.
Stay in touch with owners and tenants who are not moving yet	Quarterly per contact	Full	The cadence runs under the broker's name; replies become tasks.
Build and dial the prospecting call list	Weekly	Partial	The list builds itself with DNC checks; dialing stays manual.
Match new listings to tenant requirements and buy boxes	Per listing	Partial	The registry lists matches; the broker approves outreach.
Send teasers, collect CAs, release the OM	Per listing	Full	CA-gated flow with open tracking.
Book tours and collect feedback	Per tour	Full	Booking, reminders and feedback requests to the touring broker.
Log co-broker registrations	Per registration	Full	Form, date stamp and tour history on the listing.
Weekly landlord and seller report	Weekly per listing	Full	Inquiries, CAs, tours, feedback and proposals compiled for review.
Track proposals, LOIs and counters	Per deal	Partial	Log and expiry alerts are automatic; the negotiation is not.
Watch every PSA and lease date	Daily	Full	Back-solved critical dates with alerts to all parties.
Chase diligence and closing documents	Per deal	Partial	Live board and reminders; the review is human.
1031 date watch	Per exchange	Partial	Staff alerts only; the QI and CPA advise.
Tombstone and referral ask at close	Per deal	Partial	Draft is automatic; the client approves.

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Continued

RECURRING TASK	HOW OFTEN	AUTOMATE?	WHAT CHANGES
Owner-routed onboarding	Per new client	Full	Every new client gets the welcome from their own rep: the rep's name, the rep's email and the rep's own sign-up link, so the file lands in that rep's queue. One message per client, never duplicates. For you: per broker. (Growth and up.)
Billing that runs itself	Per invoice	Full	Branded invoice email; a reminder ladder (3 days before due, due day, a 3-day grace nudge, a final notice at 7 days); card-on-file autopay with a 'charge coming up' notice and a 'card declined, update your card' notice; receipts; invoice defaults (terms, due days, logo, from address). Email-first. For you: retainers, consulting and BOV fees, if you charge them. (Growth and up.)
Commission ledger	Monthly	Full	Commissions calculated from money actually collected, not signed deals, using your own plan rules (splits, first-half / second-half payouts, clawbacks, lead-type rates), with a monthly statement per rep and a 'needs attention' list. For you: co-broker splits and your broker and agent splits. (Full Engine.)
Typical reclaim	Measured in your own time audit (Section 9 of the intake packet) — we don't quote an hours figure before we've seen yours		

THE SEAT THIS DEFERS

A marketing coordinator runs about \$70,000 a year loaded

Salary.com puts a real estate marketing coordinator at \$56,342 (June 2026); add 25% for taxes and benefits. Growth is \$14,364 a year after year one. The coordinator's judgment on a piece stays; the reports, the cadence, the date calendar and the document chase run on their own.

WHATEVER THE INDUSTRY

The work that stops being yours.

Not features. Tasks — the ones currently done by you, done badly by someone else, or not done at all.

Every new lead

- Answered within seconds by text and email, day or night
- Assigned to the right person automatically
- Every missed call texted back
- The quiet ones chased on a schedule that doesn't annoy them
- The appointment booked without a phone-tag loop

Your existing list

- Old leads re-activated after being written off
- Anyone who re-engages detected and routed to a human
- A long-term nurture running in the background
- Unsubscribes and bounces handled automatically
- The list kept clean and deliverable

Clients in progress

- Onboarding sequence and document collection
- Status updates so nobody has to ask
- Invoices and payment links
- Review requests at the right moment
- Referral asks after a win

Partners and referral sources

- Tagged links so every referral is credited automatically
- Printable materials for their counter or desk
- Monthly statements sent without you touching them
- Recruitment outreach to bring on more partners

YOU, ON MONDAY MORNING

One email with the numbers that matter: what came in and from where, what closed, what stalled, how the campaigns did, which partners sent business, and what got built or fixed that week. Plus a dashboard you can open on your phone. Written for an owner, not a technician.