WHAT YOU ARE GETTING

The build, itemized.

Commercial Brokerage

Not a feature brochure. Every line below is something that exists and works when the four weeks are done, and that you can open in your own account and see.

Each package is cumulative. Growth includes all of Launch. Full Engine includes all of Growth. The prices are the same in every industry; what is inside them is built for commercial brokerage.

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Launch

Foundation, plus every lead answered fast. For a small team whose main leak is response time and follow-up.

BUILD FEE	MONTHLY
$3,500	$697
one time	includes the platform

DELIVERED

- **Tracked number, domain and email.** A tracked local number, your domain and professional email on your own identity, with call routing and recording.
- **Pipelines in your team's language.** CRM pipelines and stages named the way your team actually talks.
- **Lead capture with written consent.** A lead-capture page and forms that record written consent to call and text, with a privacy link, on every entry point.
- **Reply in under 60 seconds.** A reply to every new inquiry in under 60 seconds, by text and email, that stops the moment they answer.
- **Round-robin with a claim window.** Round-robin assignment with a claim window and automatic reassignment, so no lead sits with someone who is off.
- **Missed-call text-back.** Missed-call text-back with a booking link.
- **Booking calendars.** Booking calendars per person with confirmation and reminder sequences.
- **5-day follow-up drip.** A 5-day follow-up drip that stops instantly on any reply or opt-out.
- **Lead-source tagging.** Lead-source tagging at entry on every channel, so cost per sale by source is measurable from day one.
- **Review requests.** A review request at the right moment after the sale or visit, sent to everyone, never filtered by sentiment.
- **Business texting registration.** A2P 10DLC brand and campaign registration prepared with sample messages that match your consent language.
- **Compliance shell.** Consent records with timestamps, STOP and any-reasonable-means opt-outs honored across every channel and workflow, quiet hours, the required footers and identifiers, and a blocked-phrase list applied to every template.
- **Daily recap and weekly funnel report.** Daily recap and a weekly funnel report to the owner.
- **Handoff booklet and training.** A handoff booklet with screenshots of every system, and team training.

BUILT FOR COMMERCIAL BROKERAGE

PIPELINE STAGES

Leasing: Prospect → Contacted → Meeting → Representation Signed → Marketing / Touring → Proposal / LOI → Lease Negotiation → Lease Executed → Occupancy. Investment sales: Prospect → Contacted → BOV Delivered → Listing Signed → Marketing / CA & OM → Call for Offers → LOI → PSA Executed → Due Diligence → Deposit Hard → Closed

- **Two pipelines.** Leasing: Prospect, Contacted, Meeting, Representation Signed, Marketing / Touring, Proposal / LOI, Lease Negotiation, Lease Executed, Occupancy. Investment sales: Prospect, Contacted, BOV Delivered, Listing Signed, Marketing / CA and OM, Call for Offers, LOI, PSA Executed, Due Diligence, Deposit Hard, Closed. Side lanes: Owner Long-Term, Tenant Expiration Watch, Buyer Requirement (including 1031), Lost / Went Elsewhere.
- Instant reply covers LoopNet, Crexi and website inquiries, sign calls and missed calls. An inquiry on a listing routes to the listing broker; an unassigned inquiry goes by round robin with a claim window, and an existing client goes to the broker who owns the relationship.
- **Source tags:** LoopNet, Crexi, CoStar, the local CIE, sign call, direct mail, email campaign, cold call (manual), broker-to-broker, attorney or CPA referral, lender referral, LinkedIn, repeat client.
- The compliance shell adds the licensed brokerage name (and license number where the state requires it) on every page, email, flyer and card, CAN-SPAM footers on all email, DNC checks and manual dialing for prospecting calls, consent capture before any text, and fair-housing screening on any multifamily leasing copy.
- **Review request:** a Google review ask plus a private testimonial request at close or lease execution. A testimonial becomes a tombstone only with written approval.
- A2P 10DLC sample messages cover appointment, tour and transaction updates to people who asked, not cold outreach.

Growth

Everything in Launch, plus onboarding, retention, database re-activation, the full Monday report and your industry engine. The package most businesses land on.

BUILD FEE
$6,500
one time

MONTHLY
$1,197
includes the platform

DELIVERED — EVERYTHING IN LAUNCH, PLUS

- **Branded email templates.** Branded email templates with your identifiers locked in.
- **Client onboarding.** Client onboarding on “Sold”: welcome, what-happens-next, document request with secure upload links, e-sign, payment link. Never asks for sensitive data by email reply.
- **Invoicing and payment links.** Invoicing and payment links with reminders until paid.
- **Document and signature chase.** Document and signature chase with a live staff checklist showing who owes what and how long it has been outstanding.
- **Long-term nurture.** Long-term nurture sized to your buying cycle, kept separate from the 5-day drip, with a re-engagement detector that moves anyone who responds back to the front of the pipeline with an alert.
- **Owned-list re-activation.** Owned-list re-activation: a ramped, bounce-guarded campaign against every old lead and past customer you already paid for.
- **Retention program.** A retention program for existing customers: anniversaries, check-ins, renewals, and the save flow when someone tries to leave.
- **Per-rep pages and QR cards.** Per-rep landing pages and QR cards, each feeding the same pipeline with attribution to the rep.
- **After-hours AI assistant.** An after-hours AI assistant that answers, qualifies and books, fenced by your industry’s never-list.
- **Full weekly owner’s report.** The full weekly owner’s report, written as what the business accomplished, never a task log.
- **Live dashboard and command center.** A live dashboard and an owner’s command center: one screen instead of four logins, showing this week’s recurring tasks with tick-off, a green, amber or red light on every system, the documents and logins in one place, and a fix-it runbook for when something breaks.
- **Client onboarding is the engagement packet:** the listing agreement or tenant or buyer representation agreement with its written commission terms, the agency disclosures the state requires, a confidentiality agreement where needed, a property data request (rent roll, T-12, leases, surveys, prior reports) through a secure upload link, and the kickoff meeting. It comes from the broker who owns the client.
- Invoicing and payment links are rarely used, because commissions are paid at closing or on lease execution under the commission agreement. The line covers retainers, consulting fees and paid BOVs or valuations, if the brokerage charges them.
- Long-term nurture is indefinite for owners, tenants and investors, keyed to each record’s expiration, maturity or hold-period window.
- Owned-list re-activation works the brokerage’s old owner, tenant and investor lists, email and mail first.
- The after-hours AI assistant answers "is this space or property still available?", collects size, use, budget band and timing from tenants and buy-box details from investors, and books a call. It never states a rent, price, cap rate or value, never characterizes zoning, condition or environmental status, and never gives tax, 1031 or investment advice.

YOUR INDUSTRY ENGINE · INCLUDED IN GROWTH

The Expiration-to-Close Engine

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

Expiration and Maturity Radar

Every tenant in the broker's target buildings and submarkets gets a record with its lease expiration, square footage and renewal-option notice date (from the broker's own comps, CoStar or Crexi data the client licenses, or public records). Every owner record carries the loan maturity and purchase date where known. At the windows the broker sets at intake, each record becomes a dated prospecting task. The system reminds; it never guesses a date it was not given.

Owner and Tenant Prospecting Cadence

Owners and tenant decision-makers get a multi-year cadence under the broker's name: quarterly market notes the broker approves (lease comps, sale comps, submarket vacancy), an annual check-in, and a touch as each window opens. Email and mail are the default. Calls are dialed by hand after DNC checks, and texts go only to people who gave written consent. Any reply lands with the broker as a task.

Tenant and Buyer Requirement Registry

Every active tenant requirement (size, submarket, use, budget band, move date) and every investor buy box (property type, markets, deal size, cap-rate or yield target the client states, 1031 timing) is kept on file and refreshed by form. When a listing is added, the system lists every requirement it fits and drafts the broker's outreach for approval.

Confidentiality-Gated Offering Flow

For investment sales and confidential leasing assignments: a teaser to matched buyers, the confidentiality agreement e-signed before the offering memorandum or data room is released, open tracking, and call-for-offers and best-and-final deadlines with reminders.

Tour and Activity Loop

Tours booked with the tenant rep or buyer's broker, a feedback request after each tour, and a weekly activity report to the landlord or seller: inquiries, CAs signed, tours, feedback and proposals, compiled for the broker to review and send.

Co-Broker Registration Desk

An outside broker registers their client through a form. The registration, the date, the commission agreement status and the tour history are logged on the listing, so procuring-cause questions have a record and nobody tours a registered client twice. Fees move only broker to broker under the written listing and commission agreements.

Proposal and LOI Tracker

Every RFP response, lease proposal and purchase LOI is logged with its key terms, expiry and counter status. When an LOI is signed, a lease or PSA drafting checklist opens for the attorneys, and the system nudges the parties on open points without touching the legal drafting.

Critical Dates Calendar

Enter the effective date once. For a sale, every PSA date back-solves: title and survey objections, due-diligence end, deposit going hard, closing and extensions, plus 45-day and 180-day 1031 reminders for staff when a client is exchanging. For a lease: execution, TI and permit milestones, commencement, rent start, and the renewal, expansion and termination option notice dates, each of which feeds the Expiration Radar for the next deal. Alerts go to the broker, the client and the escrow or title officer before each date.

Due-Diligence and Closing Document Chase

One board per deal showing what is outstanding and who owes it: rent roll, T-12, leases and amendments, estoppels, SNDAs, title commitment, ALTA survey, Phase I ESA, zoning letter, property condition report, certificate of insurance. Reminders go out until each item is checked in. The system tracks that a document arrived; it never characterizes what it says.

Closed-Deal Tombstone and Referral Ask

At close or lease execution: a draft tombstone for the broker's site and LinkedIn (property type, size, submarket, parties only with written approval, no price or rent unless the client approves), a review or testimonial request, and a referral ask.

Full Engine

Everything in Growth, plus the referral-partner program, full operations, and a monthly think-tank that keeps finding the next thing to take off your team's plate.

BUILD FEE	MONTHLY
$9,500	$1,697
one time	includes the platform

DELIVERED — EVERYTHING IN GROWTH, PLUS

- **Referral partner program.** A referral partner program with a tracked link and printed QR card per partner and automatic attribution written at lead creation.
- **Printable partner materials.** Printable partner materials: welcome packet, counter cards, one-pagers, version-numbered.
- **Monthly partner statements.** Automated monthly partner statements, with contents set by what the law allows in your industry. Where a threshold decides what appears on a statement, the system records the decision and never the figure behind it, so the sheet stays safe to share with staff.
- **Partner outreach campaign.** A partner outreach campaign to build the bench, with a no-fee copy variant wherever a fee is illegal.
- **Partner lanes.** Partner lanes: a separate pipeline and cadence per partner type.
- **Operating-rhythm automations.** Every operating-rhythm automation from the intake: huddle prep, daily lists, weekly reviews, monthly reports.
- **Internal task and alert flows.** Internal task and alert flows: unclaimed lead, stalled file, deadline at risk, negative review, manager escalation.
- **Written procedures.** Written procedures for the team's own operations.
- **Priority support.** Priority support: a named contact, a weekly twenty-minute call, same-day changes.
- **Monthly business report.** Monthly business report in addition to the weekly.
- **Handoff booklet, kept current.** The handoff booklet, kept current as the system changes.
- **Monthly automation think-tank.** A standing session every month where we sit down with you and your team, find the daily tasks eating their time, and design and build custom automations for them.

THE PART NOBODY ELSE SELLS

Monthly automation think-tank

A standing session every month where we sit down with you and your team, find the daily tasks that are eating their time, and design and build custom automations for them. Every build is documented and added to your handoff booklet. It is the reason Full Engine clients stay for years: the system keeps getting better instead of slowly going stale.

FULL ENGINE, BUILT FOR COMMERCIAL BROKERAGE

Partners, lanes and rhythm in your business.

- **Partner lanes:** other brokerages (out-of-market referrals and co-brokerage), real estate attorneys, lenders and mortgage brokers, title and escrow officers, 1031 qualified intermediaries, CPAs, property managers, architects, space planners and general contractors (tenant improvements), and appraisers.
- Monthly partner statements carry money only broker to broker, under a written referral or commission agreement, paid through the brokerages. Every other partner gets a reporting-only lane: attribution and a recognition note, no fee. Paying unlicensed people for real estate referrals is restricted in most states (for example California B&P 10137).
- **The capital line is separate.** If the brokerage raises equity for a sponsor, or is paid on a transaction basis for bringing investors to a syndication, TIC or DST, that is securities activity and can require broker-dealer registration. The system builds no investor-solicitation funnel without written sign-off from the client's securities counsel.
- **Commission ledger (money desk):** co-broker splits and the brokerage's own broker and agent splits, calculated from commissions actually received, with a statement per broker. Payouts stay in the accounting system.
- **Recruiting funnel:** yes, for analysts, associates and producing brokers, where the firm is hiring, with a license-transfer onboarding checklist.
- **Operating-rhythm automations:** the Monday deal-calendar digest (every lease and PSA date in the next 30 days), the weekly expiration and maturity call list, weekly landlord and seller activity reports, quarterly requirement-registry refresh requests, and a monthly pipeline and fee forecast.
- **Internal alerts:** a critical date within 5 days, an LOI expiring, a diligence item overdue, a renewal-option notice date approaching, a 1031 date approaching, an owner or tenant reply, and a co-broker registration on a listing.
- **Multi-office:** office-level and team-level views, with the principal's roll-up.

MONEY DESK

The money desk: onboarding, billing and commissions.

Built and running at Snap Credit Fix. Each line shows the package it comes in for Commercial Brokerage.

- **Owner-routed onboarding** `[Growth and up]` 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.
- **Billing that runs itself** `[Growth and up]` 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.
- **Commission ledger** `[Full Engine]` 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.

TERMS

The fine print, in plain words.

- **Same three packages, same prices, every industry.** What changes is what goes inside them for commercial brokerage.
- Each monthly fee includes a **$197 platform licence** for your white-labeled workspace. One bill, no separate software vendor. If you already own your own HighLevel account, take $197 off the monthly and we build in yours.
- **Ad spend and carrier messaging fees are billed at cost.** We don't mark them up.
- The **build fee is half at signature, half on delivery.**
- **Month to month after the first 90 days.** No long contract.
- **Add-ons bought with the build are 15% less** than the same add-on later.
- **Regulated industries get a compliance review in week one at no charge.** Every template goes to your compliance officer or counsel before it goes live. We build the system and the evidence file; we do not give legal advice.
- **You own everything** — accounts, data, scripts and documents. Your contacts, pipelines, templates and documents export at any time, and the domain and sheets are registered in your name.

What we ask of you

About two hours for intake in week one, a thirty-minute review each week during the build, and one hour at handoff. After that, the only thing the system needs from your team is that they answer the leads it hands them. That one is not optional, and it is the single biggest difference between clients who get results and clients who don't.

Proof

Snap Credit Fix, a California credit repair company in one of the most regulated categories there is, runs on a system I built for them: leads answered in under a minute and assigned round-robin, a 52-week nurture, a re-activation campaign across roughly 40,000 past leads, a dealer referral program with printed QR counter cards and automated monthly statements, and a Monday report the president reads first. If it passes there, it passes in yours.