ACROSS THE TABLE

BUSINESS CONSULTING

INDUSTRY STACK 04 · REAL ESTATE COMPANY

# The Real Estate Stack

*Nine systems from lead to closing to the client you keep — and the places a licence makes AI a legal question, not a convenience one.*

Knowledge Article I04

AI Stack Series · acrossthetable.biz

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## WHO THIS IS FOR

You run a brokerage, a team, or your own book of business as an agent. You buy leads, or you earn them, and the difference between a good year and a bad one is usually how fast you answer and how long you stay in touch.

This guide is for the agent or team lead who has tools scattered across a phone, a portal and a spreadsheet and wants to see how the pieces are supposed to fit.

One thing to say early: you hold a licence. That changes what you can hand to software, and this guide says where.

## START WITH THE WORK, NOT WITH THE APPS

These are not twenty lists of AI apps. Each stack starts with the jobs a particular business performs, then matches AI and conventional software to those jobs. Treat it as a menu to evaluate, not a shopping list.

For this kind of business the work runs in one line, start to finish:

> **THE PATH THE WORK TAKES**
> Lead → Property → Showing → Transaction → Relationship

Broken into the steps a customer actually moves through:

- Lead
- CRM
- Property match
- Showing
- Offer
- Documents
- Closing
- Follow-up

Read that line left to right. A lead arrives, you match them to property, you show it, you paper the transaction, and then you either keep the relationship for the next ten years or you do not.

Two gaps cost the most in this business. The first is speed to lead — a bought lead that sits for an hour is often already someone else’s client. The second is the long middle after closing, where agents who stay in touch get the referral and agents who do not start every year from zero.

## THE STACK, PIECE BY PIECE

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Every tool below is matched to one of those steps. You do not need all of them, and you should not buy all of them at once. Read the “What it is” column first and find the step where your business is losing the most time or money.

| Tool | The step it covers | What it is | Price |
|---|---|---|---|
| Follow Up Boss | Real-estate CRM | Lead routing, follow-up and agent accountability for real estate teams. | Per user/month. |
| Zillow | Property and lead ecosystem | Listing exposure and buyer lead generation. | Advertising spend. |
| Calendly | Showings and meetings | Shared booking links tied to your calendar. | Free tier; paid per user/month. |
| Canva | Listing marketing | Design everything else — decks, social posts, flyers, simple video — with AI help built in. | Free tier; Pro per user/month. |
| Matterport | Virtual property tours | 3D property capture and virtual walkthroughs. | Per month by active spaces. |
| ChatGPT / Claude | Communicatio n and content | OpenAI’s general assistant — writing, analysis, research and, with Agent mode, multi-step work. | Free tier; paid plans per user/month. |
| DocuSign | Signatures | Electronic signature and agreement management. | Per user/month. |
| QuickBooks | Accounting | The small-business accounting standard — books, invoicing, reporting. | Per month by plan. |
| Zapier | Automation | Connects thousands of apps and AI models with no code. | Free tier; paid by task volume. |

Where two names share a row with a slash between them, they do the same job and you pick one, not both. The description shows the first of the two.

A solo agent can start with the CRM, a booking link and signatures. Everything else is a growth decision.

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### What to watch out for in each one

None of these are reasons not to buy. They are the things owners tell us they wish they had known first.

- Follow Up Boss — Only works with disciplined follow-up rules.
- Zillow — Leads cost money and need instant follow-up.
- Calendly — Set buffers or your day disappears.
- Canva — Easy to drift off-brand. Lock a brand kit.
- Matterport — Capture takes time per property.
- ChatGPT — It sounds confident when it’s wrong. Check anything that touches money, law or a customer.
- Claude — Same rule as any assistant: verify facts and never paste data you wouldn’t email.
- DocuSign — Envelope limits on lower plans.
- QuickBooks — Only as clean as your categorization habits.
- Zapier — Task-based pricing climbs fast once it works.

## WHERE AI ACTUALLY FITS IN THIS BUSINESS

Listing descriptions, lead follow-up, market summaries, property comparisons, marketing campaigns, client communication.

In plain terms, that means:

- Writing the listing description from the property details, in the voice you actually use, in a minute rather than an hour.
- Drafting the follow-up to the forty leads you have not spoken to since March, each one referencing what they were actually looking for.
- Turning the raw market numbers into a short, readable summary a client can understand without a real-estate vocabulary.
- Comparing properties on the criteria a specific buyer told you they care about, instead of the ones the portal sorts by.
- Writing the monthly newsletter that keeps past clients warm, which is the task most agents intend to do and never do.

What AI must not do here: decide anything about who gets shown what. Fair-housing law applies to targeting, to screening and to the words in your marketing. A tool that quietly optimizes toward one kind of buyer can create a violation nobody intended.

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## GOVERNANCE CHECK

Human and legal review stays required for contracts and any regulated representation.

In practice that means a person reads every contract before it goes out, and a person — not a model — makes any representation about value, condition or terms. Use AI to draft and to summarize. Do not use it to advise.

## WHAT TO SET UP FIRST

Do these in order. Finish one before you start the next. Most owners who try to do all of it in one month end up using none of it.

1. **Put every lead in one CRM and answer fast** Speed is the whole game on bought leads. Before you buy any other software, make sure there is one place every lead lands and one rule about how quickly it gets answered.
2. **Add a booking link** Showings and consultations stop being a text-message negotiation. This is a free change that makes you look organized.
3. **Move signatures and documents into one system** Transaction documents need to be findable years later, not in an email thread. This is a compliance matter as much as a convenience.
4. **Build the stay-in-touch habit** A simple monthly email to past clients is worth more than any new tool. AI makes it fast enough that you will actually do it.
5. **Then add the marketing extras** Virtual tours, design tools and automation are real advantages, and they are advantages on top of a working follow-up system, not instead of one.

## WHAT IT COSTS TO START

The dominant cost in real estate is not software, it is lead acquisition — and that is advertising spend, which has no ceiling and no refund. Everything in the software column is small by comparison. Decide your lead budget first, then make sure your systems are good enough not to waste it.

CRM and signature tools are priced per user per month, so a team’s cost rises with headcount. Virtual tour capture is priced by how many active spaces you keep online, which means old listings quietly cost money until you archive them.

The highest-return spend for most agents is the cheapest one: the follow-up system that keeps the leads you already paid for from going cold.

The price column in the table above tells you how each one charges — per user, per location, per contact, or a percentage of every sale — not what you will pay. That is deliberate. The charging model is what decides whether a tool stays affordable as you grow, and it is the part

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that does not change every quarter. Get the current dollar figure from the vendor's own pricing page before you budget.

## THE RULES UNDERNEATH ALL OF IT

Legal · Privacy · Data protection · Security · Compliance · Records · Audit · Risk · Human oversight — underneath every one of the twenty stacks, not an afterthought.

Fair housing applies to your marketing words, your targeting settings and your screening process. Review anything AI writes for language that describes the ideal buyer rather than the property.

Your licence carries disclosure and representation duties that do not transfer to a tool. A human reviews every contract and every representation of value.

Transaction records have retention requirements that vary by state. Keep them in a system you will still have access to in five years, not in a personal inbox.

Client financial details — pre-approval letters, bank statements — do not belong in a consumer chatbot. Strip them or use a plan with data controls turned on.

## MISTAKES THAT COST THE MOST

- Buying leads faster than you can follow up on them, which is paying twice for nothing.
- Letting a listing portal own the client relationship you paid to start.
- Publishing an AI-written listing description without reading it for fair-housing language.
- Keeping transaction documents in an email account that belongs to you personally rather than the business.
- Going quiet after closing, then wondering why repeat and referral business is thin.

## THE CEO DECISION

- What is your actual average time to first response on a new lead? Measured, not guessed.
- How many past clients heard from you in the last ninety days?
- If a complaint arrived about a transaction from two years ago, could you produce the file in ten minutes?
- Are you paying for virtual tours on listings that closed months ago?
- Which costs more — your software, or the leads you did not call back?

## YOUR QUICK REVIEW

- ☐ Every lead lands in one CRM with an owner and a response rule.
- ☐ Clients book showings and calls with a link.

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- ☐ Signed documents are stored in a system, not an inbox.
- ☐ Past clients hear from me on a schedule I do not have to remember.
- ☐ Every AI-written listing is read by a person for fair-housing language.

## ADDITIONAL RESOURCES

| Tool | Where to find it | What it is for |
|---|---|---|
| Follow Up Boss | www.followupboss.com | Teams buying leads who keep losing them. |
| Zillow | www.zillow.com | Getting properties and agents in front of buyers. |
| Calendly | calendly.com | Ending the back-and-forth on meeting times. |
| Canva | www.canva.com | Small teams with no designer who still need consistent-looking work. |
| Matterport | matterport.com | Listings where remote buyers matter. |
| ChatGPT / Claude | chatgpt.com / claude.ai | Your default thinking partner when you want one tool that does most jobs well. |
| DocuSign | www.docusign.com | Getting documents signed and stored properly. |
| QuickBooks | quickbooks.intuit.com | Clean books your accountant already knows how to read. |
| Zapier | zapier.com | Your first automations, and the widest app coverage. |
| Across the Table AI Assessment | acrossthetable.biz/#assessment | Fifteen minutes. Tells you which job to start with before you buy anything. |
| The Scaling Edge | acrossthetablebiz.substack.com | Weekly newsletter for owners without a business background. |

### Go deeper on the pieces

Each of these is a full guide comparing the three tools that do that job:

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- Ask and reason — acrossthetable.biz/knowledge-articles/ask-and-reason/ (covers ChatGPT, Claude)
- Make the deck — acrossthetable.biz/knowledge-articles/make-the-deck/ (covers Canva)
- Connect the tools — acrossthetable.biz/knowledge-articles/connect-the-tools/ (covers Zapier)
- Manage the money — acrossthetable.biz/knowledge-articles/manage-the-money/ (covers QuickBooks)

## CONTINUE LEARNING

Start with the Across the Table AI Assessment — fifteen minutes, built around what the business does rather than what is on sale.

The guides above go tool by tool for any single piece of this stack.

## READ AND CONNECT WITH ACROSS THE TABLE

Across the Table website: https://acrossthetable.biz

The Scaling Edge newsletter: https://acrossthetablebiz.substack.com

YouTube: https://www.youtube.com/@AcrossTheTableConnie

LinkedIn: https://www.linkedin.com/in/connie-jacobo-ramirez

Questions: info@acrossthetable.biz · 480-582-4716

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**ACROSS THE TABLE BUSINESS CONSULTING**

101 N First Ave, Suite 2325-1495, Phoenix, AZ 85003

info@acrossthetable.biz · 480-582-4716 · acrossthetable.biz