

● FRONT-END AI STRATEGY BEFORE LARGER SPEND BEGINS

Before you hire, buy, or build for AI, get the first decision right.

A fixed-fee advisory sprint tailored to a real estate agency with 20 offices that wants clear AI direction before committing to full-time staff, major software contracts, or custom implementation.

This is the decision layer that sits before the AI lead hire, the automation rollout, or the vendor commitment. It clarifies where AI creates value across lead generation, listing marketing, sales support, admin workflows, and office operations, what needs governance first, and what the next move should be.

A\$20,000

FIXED FEE

3-4 weeks

ADVISORY SPRINT

6 core outputs

CONCRETE DELIVERABLES

90-day plan

DECISION-READY NEXT STEP

● BEST FIT

Designed for agency leaders who know AI matters, but do not want 20 offices experimenting in 20 different directions.

The typical client is a multi-office real estate business that wants better productivity, faster response times, stronger agent support, and cleaner brand consistency without introducing compliance, trust, or workflow risk.

● **You are seeing pressure to "do something with AI"**

but the right first move is still unclear.

● **You want leverage before headcount**

so you do not hire an AI lead, buy more software, or brief vendors against a vague plan.

● **You need decision confidence**

on where AI can help agents and support teams now, where it is overhyped, and what should stay human-led.

● **WHY THIS EXISTS**

Most agencies do not need more AI enthusiasm. They need a sharper operating brief.

The common failure mode is not lack of ambition. It is fragmented adoption across offices: agents using different tools, inconsistent client communication, weak lead follow-up discipline, and content or advice going out without enough control.

COMMON FALSE START

Office-by-office tool sprawl

Different offices and agents start using different AI tools for copy, follow-up, note taking, or prospecting. The result is uneven client experience, security uncertainty, and no clear way to scale what actually works.

COMMON FALSE START

Tool-led confusion

Software demos are impressive, but the underlying workflow, CRM integration, lead-routing logic, compliance checks, and office ownership model are unresolved. Spend begins before fit is proven.

COMMON FALSE START

Marketing wins, operational misses

AI gets used for listing descriptions and social posts, but the higher-value workflow opportunities in lead response, admin handling, CRM hygiene, agent support, and management reporting remain untouched.

MARKET SIGNAL

Real estate is adopting AI quickly, but few agencies have a scaled operating model for it.

On September 18, 2025, NAR reported that 46% of agents surveyed were using AI-generated content, 20% were using AI daily, and 82% said clients responded positively to technology in the buying and selling process. At the same time, on February 12, 2026, an RPR survey found that 63% cited accuracy as their top concern. More broadly, McKinsey reported on November 5, 2025 that 62% of surveyed organisations were experimenting with AI agents, yet only 39% reported enterprise-level EBIT impact. The pressure to act is real, but disciplined adoption is still rare.

Agents are already using AI

The question is no longer whether AI will appear in the business. It already has.

Value is uneven

Some use cases save time and improve responsiveness. Others add noise, risk, or weak content.

Workflow matters more than prompts

The bigger prize is not faster copy. It is stronger lead handling, cleaner process execution, and better office support.

Accuracy and compliance matter

Property claims, suburb commentary, client advice, and automated follow-up all need control.

The first move matters

The costliest mistake is not ignoring AI. It is scaling inconsistent use across 20 offices without a clear model.

Evidence base: NAR 2025 Technology Survey and September 18, 2025 news release; RPR survey reported by NAR on February 12, 2026; McKinsey, "The state of AI in 2025: Agents, innovation, and transformation," November 5, 2025.

● THE OFFER

A compact advisory sprint that turns AI pressure into a disciplined agency operating plan.

This is a front-end strategy and decision engagement for a multi-office real estate business. It is not generic AI training, and it is not implementation theatre. The output is a decision-ready view of where AI creates measurable value across the agency, what is worth backing first, what should wait, and what capability, partner, or leadership model comes next.

01

Agency AI Opportunity Map

A ranked view of the workflows where AI could create value across lead response, appraisal prep, listing marketing, CRM follow-up, admin support, recruitment support, and office operations.

02

20-Office Readiness Review

A practical view of current systems, office-by-office variation, shadow AI use, CRM hygiene, marketing workflows, and where the operating foundation is too fragmented to scale safely.

03

Value Case and Decision Criteria

A baseline for what the first AI moves must prove: response time, agent productivity, campaign throughput, admin efficiency, adoption quality, and commercial payoff.

04

Controls, Guardrails, and Human Oversight Model

Clear boundaries for what AI can draft, recommend, or automate in client-facing communication, listing content, prospecting, internal knowledge use, and management reporting.

05

Vendor, Workflow, and Capability Recommendation

A recommendation on the right next move: existing platform extension, new software, specialist vendor, internal enablement function, external partner, or a future internal AI lead once the brief is ready.

06

Executive Decision Memo and 90-Day Plan

A concise executive pack that states the priority use cases, office rollout logic, guardrails, technology decisions, and the first-90-day plan for controlled execution.

FIXED-FEE SPRINT

AI Readiness, Opportunity & Leadership Fit Sprint

A\$20,000

Designed to help a 20-office real estate agency make the right AI decisions before taking on larger fixed costs.

- 3-4 week engagement from kickoff to executive readout.

- Half-day leadership workshop covering growth priorities, office variation, sales process, marketing workflows, and risk concerns.
- Targeted interviews with key office leaders, agents, marketing, operations, and support functions.
- Final executive presentation and decision session with a clear recommendation and first-90-day plan.

CLEAR SCOPE

DECISION-READY OUTPUTS

BEFORE FULL-TIME HIRES

WHAT YOU ARE REALLY BUYING

Fewer expensive mistakes

- A better brief before you expand software spend, centralise AI ownership, or hire specialist capability.
- A more disciplined path to value across 20 offices, with clearer priorities and fewer distractions.
- A credible governance position before AI becomes embedded in client-facing and compliance-sensitive workflows.
- A sharper view of what should remain human-led and where automation is genuinely worthwhile.
- A professional decision pack that can be used with owners, executives, office leaders, and investors.

LESS TOOL SPRAWL

LESS HIRING RISK

MORE COMMERCIAL CLARITY

● **WHAT CHANGES AFTER THIS**

You move from scattered AI activity to a controlled agency-wide direction.

WITHOUT THIS SPRINT

What multi-office agencies often live with

Noise from vendors, office-level experimentation, unclear ownership, uneven client communication standards, and growing uncertainty about where money should actually be spent.

WITH THIS SPRINT

What you walk away with

A cleaner opportunity set, clearer investment logic, defined guardrails, and a grounded recommendation on whether the next move is software, office enablement, partner support, internal capability, or a future hire.

● WHY THIS IS CREDIBLE

Commercial judgment, workflow depth, and hands-on AI execution.

PERSPECTIVE

This is not pure strategy language.

The value here is the combination: enough technical and workflow depth to understand what AI can realistically do in a service business, enough governance discipline to know what is safe, and enough commercial judgment to shape a decision leadership can actually back.

RELEVANT PROOF POINTS

Work that supports the offer

Enterprise AI governance and operating-model design, AI use-case discovery and workflow redesign in complex service environments, and practical prototype and implementation work across smaller commercial settings where speed, clarity, consistency, and cost discipline matter.

● HOW THE SPRINT RUNS

Short, direct, and designed to end in a real next-step decision.

WEEK 1

Leadership workshop

Clarify growth priorities, office performance pressures, customer experience goals, and the core questions that need answering first.

WEEK 1-2

Interviews and workflow review

Review lead flow, listing and campaign production, admin handling, CRM usage, informal AI usage, and current tooling assumptions.

WEEK 2-3

Synthesis and design

Build the opportunity map, value logic, controls model, and recommendation on the right capability path for a multi-office rollout.

WEEK 3-4

Decision session

Present the recommendation, stress-test the options, and align the first 90 days of work.

OPTIONAL CONTINUATION

If the first move is clear, support can continue in a narrower form.

The sprint can stand alone. If useful, it can transition into focused advisory support once a decision has been made and the brief is clean.

Agency AI Decision Office

Leadership-level support on sequencing, vendor evaluation, office rollout choices, and executive AI decisions.

Governance and Quality Support

Practical help defining review thresholds, quality checks, risk controls, and human oversight as client-facing use cases move forward.

Internal Enablement or AI Lead Briefing

Support for handing the roadmap to an internal enablement function, operations lead, or future AI specialist with a far clearer mandate.

● CLOSING POINT

The expensive AI mistake for a real estate agency is rarely doing nothing. It is letting 20 offices adopt it inconsistently before the business has decided where value sits and how the risk will be controlled.

AI Readiness, Opportunity & Leadership Fit Sprint: the high-trust first layer for a multi-office real estate agency that wants to move intelligently before making bigger commitments.

Prepared as a premium client-facing proposal document tailored to a 20-office real estate agency