

CASE STUDY

Tour at 2pm, memo in the landlord's inbox by 5

Voice notes from the car become landlord ready tour memos in the team's house format, the same afternoon. Brokers stay in the field, and landlords stop wondering whether anything happened.

SECTOR	Commercial brokerage, office and industrial
ENGAGEMENT	AI workflow, live deployment
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01 The bottleneck

Tour memos are how a brokerage proves motion to landlords and keeps deals warm. They are also unpaid writing homework at nine in the evening. Brokers either wrote them late, wrote them thin, or did not write them at all, and the gap showed up in the next listing pitch as a landlord asking what exactly had been happening on the property.

“The memo was always the bottleneck. Three tours meant three evenings of writing, or three days of the landlord wondering if anything happened.”

Broker, office and industrial team

TOUR TO MEMO

Same day

was 2 to 4 days

TOURS DOCUMENTED PER
BROKER WEEK

3x

HOUSE FORMAT ADHERENCE

100%

The problem was never that brokers could not write. It was that the writing happened at the worst possible time, after a full day in the field, competing with everything else that had piled up.

02 What changed

Brokers leave a two minute voice note in the car after each tour: who showed, what they reacted to, the objections, the next step. The workflow drafts the memo in the team's own format, pulls property facts from the listing file, and stages it for a one minute review. Recurring landlord updates assemble themselves the same way, out of activity already logged.

	BEFORE	AFTER
Memo turnaround	2 to 4 days, sometimes never	Same afternoon
Broker writing time	Hours per week, after hours	One minute of review per memo
Landlord updates	Assembled from memory on Friday	Assembled from logged activity

How it unfolded

WEEK 1

Capture the house style

We pulled the memos landlords actually responded to and encoded the structure, tone, and framing the team had developed over years.

WEEK 2

Voice note to draft

Brokers record after each tour. The workflow drafts in house format and pulls property facts from the listing file.

WEEK 3 ON

Same day standard

Review takes a minute, memos go out the same afternoon, and recurring landlord updates assemble themselves.

What stayed human

The tour itself, the read on the prospect, the pricing conversation, and the relationship. The workflow writes down what the broker already knows. It does not pretend to know the market.

What we will not show you

The memo voice, the structure landlords respond to, and how objections get framed took years to develop. That is the team's edge and it stays theirs. The job here is to reproduce it at 5pm instead of 9pm, not to publish it.

Client name withheld by policy. Figures reflect the deployed team's own before and after measurement and will vary by office, tour volume, and reporting standard.