

Before our call, let's map your real-estate operation.

Real-estate firms run on deal sourcing, underwriting, investor relations, asset management, and reporting. The more we know about how yours actually runs today, the sharper our audit call will be and the more accurate the proposal we send afterward. Estimated time: 20–30 minutes.

Referred to us? Complete this and bring it to your intro call (or send it ahead). It gets your referral taken seriously and means we only spend time where there's a genuine fit.

Prepared for

Your name

Company / firm

Company name

Audit call scheduled

DD / MM / YYYY · time

Date completed

DD / MM / YYYY

01 About you & your firm

Your name

Role / title

Email

Phone

Company / firm

Website

https://

What kind of firm are you?

- Investor / owner-operator Syndicator / GP Fund / institutional Developer Brokerage Property management Lender / debt
 Other

Asset classes

Tick all that apply.

- Multifamily Office Retail Industrial Hospitality Self-storage Land / development Mixed-use Other

Markets you serve

e.g. Texas, Southeast, national

Portfolio size (optional)

AUM, # units / doors, or deals / yr

02 Team structure

Headcount by function. Full-time, part-time, and contractors combined. Approximate is fine.

Acquisitions / sourcing

people

Underwriting / analysis

people

Asset management

people

Investor relations / capital

people

Finance (accounting / AR / AP)

people

Executive / leadership

people

Who on the team is your biggest constraint right now?

The role whose time you can't easily add more of. e.g. Me. Every underwriting model and LP update routes through me.

03 Time map: the top 3 workflows that eat your week

The most repetitive, time-consuming things your team does every week. Rank by total hours burned — this is where the actual ROI lives.

Workflow #1: the biggest time sink

What is it?

e.g. Underwriting every new deal — pulling rent rolls and T-12s into a model by hand.

Who does it?

Hours / week (across team)

e.g. ~15h

Tools used today

e.g. Excel + Argus + email

Workflow #2

What is it?

e.g. Building IC memos / investment summaries for each deal.

Who does it?

Hours / week (across team)

Tools used today

Workflow #3

What is it?

e.g. LP / investor reporting — distributions, K-1 chasing, quarterly updates.

Who does it?

Hours / week (across team)

Tools used today

04 Your current stack

What tools you actually use. List what people open every week, not what's just sitting in your account.

Property mgmt / accounting

e.g. Yardi, AppFolio, MRI, Buildium, QuickBooks

CRM / deal pipeline

e.g. HubSpot, Salesforce, Dealpath, spreadsheets

Underwriting / modeling

e.g. Excel, Argus, custom models

Investor portal / fundraising

e.g. Juniper Square, InvestNext, Agora, SyndicationPro, none

Documents / data room

e.g. Google Drive, SharePoint, Dropbox, Box

E-sign / contracts

e.g. DocuSign, PandaDoc, paper

Market data / sourcing

e.g. CoStar, Crexi, Reonomy, CompStak, MLS

Email & communication

e.g. Gmail / Outlook, Slack

Reporting / dashboards

e.g. Excel, Power BI, none

Other tools you rely on

05 SOPs & documentation

Do you have documented SOPs / playbooks?

Yes, most processes Partial, some critical ones No, it's all in people's heads

Where are they stored?

e.g. Notion, Google Drive, Loom

Who maintains them?

How closely are they actually followed in practice?

Honest answer. The gap between the written SOP and what actually happens on a Tuesday.

06 Data & compliance

High-level only — we'll go deep on specifics during the call.

What sensitive data do you handle?

Tick all that apply.

Investor PII / accreditation Financials / bank details Tenant / lease data Lender / loan documents None notable

Any constraints we should design around?

e.g. SEC / Reg D investor handling, fund-admin requirements, audit trail, data residency.

Audit trail / electronic signature requirements

Required at MVP Required post-MVP Not required Not sure yet

07 Bottlenecks & past attempts

What's the single biggest operational bottleneck right now?

If you could automate ONE thing tomorrow, what would it be?

What have you tried before?

ERPs, agencies, custom dev, internal hires, etc.

What didn't work, and why?

→ What happens next

Send this back with your referral, or bring it to your call — so we walk in with a working hypothesis instead of starting from scratch.

1 We review before the call

We map your workflows to our module library and arrive with a working hypothesis of where automation has the highest ROI for your firm.

2 45-min audit call

We walk through your top workflows live, validate assumptions, and pressure-test what's worth automating first versus parking.

3 Tailored proposal & quote

You get a written proposal with module breakdown, timeline, deliverables, and a fixed quote within 1 week of the call.

4 Kickoff if it's a fit

If you green-light it, we kick off within 1–2 weeks. If it's not a fit, we'll tell you straight and point you somewhere better.

Send this back before your call: save as PDF and email to sasha@nextautomation.us — or hand it to whoever referred you. The more specific your answers, the more leverage we get out of our time together.

Signature (optional — acknowledges info is accurate)

Date

Built for real-estate teams who'd rather close deals than chase spreadsheets.