
BORRON STRATEGIC INTELLIGENCE

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All engagements are treated with strict confidentiality

REAL ESTATE OPERATIONS · SAN DIEGO MARKET

AI Lead-Response & Showing Automation Offer for Real Estate Agents

PREPARED FOR

Agent / Brokerage Name: *[Agent or Brokerage Business Name]*

Contact Name: *[Agent First & Last Name]*

Brokerage Address: *[Street Address, City, State, ZIP]*

License Number: *[California DRE License Number]*

Phone: *[Agent Phone Number]*

Email: *[Agent Email Address]*

Date of Offer: *[Date]*

Offer Reference: *[BSI-OFFER-XXXX]*

OUR PROMISE TO YOUR BUSINESS

"We help San Diego real estate agents capture every lead the moment it arrives, qualify buyers and sellers automatically, and fill their showing calendar with less manual coordination — so the next commission does not slip away because a message went unanswered at 9pm on a Sunday."

WHY REAL ESTATE IS THE HIGHEST-STAKES CASE FOR AI

In most small businesses a missed inquiry costs a modest sale. In real estate, a missed lead can cost ten thousand dollars or more in lost commission. That asymmetry makes speed and consistency of follow-up more critical in this industry than almost any other — and it is exactly where AI delivers its clearest return on investment.

Research across real estate teams using AI for after-hours lead capture consistently shows 15 to 20 additional qualified leads captured per month that would otherwise have been lost entirely. AI-driven follow-up sequences have been shown to increase showing bookings by 35 percent and conversion rates by up to 29 percent. These are not marginal improvements. At San Diego property values, they represent significant commission revenue recovered from what used to be invisible losses.

WHY SAN DIEGO MAKES THIS EVEN MORE COMPELLING

San Diego's real estate market has specific characteristics that strengthen the case for AI integration beyond the national average:

- **High property values and commissions:** Higher average transaction values mean greater ROI justification for every dollar invested in automation. A single recovered lead in San Diego frequently represents more commission than an entire month of AI subscription costs.
- **Intense competition for qualified leads:** San Diego agents compete hard. Faster response times and more consistent follow-up create a real and measurable competitive advantage in a market where the agent who responds first wins the client the majority of the time.
- **Regulatory and permitting complexity:** California's strict permitting requirements, environmental review processes, and zoning regulations create additional administrative burden — particularly for agents working with developers, investors, and renovation projects. AI workflows reduce the time spent managing that administrative layer.
- **Strong residential activity in 2025:** With commercial construction declining and zero office starts recorded in 2025, residential real estate and renovation activity remains robust. Agents are handling high lead volumes with the same resources — making workflow automation not a luxury but a practical necessity for maintaining service quality.
- **After-hours lead volume is significant:** San Diego's active lifestyle market means buyers and sellers are researching properties evenings and weekends. Leads submitted outside business hours are common — and agents without an AI response system lose them almost entirely to competitors who respond within the critical first five minutes.

WHERE AI WORKS IN YOUR REAL ESTATE PRACTICE

Six workflows mapped directly to your biggest revenue opportunities.

- **24/7 Lead Capture & Instant Response:** Every inquiry from your website, Zillow, Realtor.com, social media, or direct message receives an immediate, intelligent response — any hour, any day. Contact information is captured, interest level noted, and the lead is logged before a competitor even sees the notification.
- **Lead Qualification & Timeline Scoring:** Not every inquiry represents a serious buyer or seller. AI qualification workflows ask the right questions — timeline, pre-approval status, current living situation, motivation — and score leads so your personal attention goes to the ones most likely to close.
- **Automatic Showing Scheduling & Calendar Sync:** Qualified leads book their own showing slots directly into your calendar. The system sends confirmations, 24-hour reminders, and same-day reminders automatically — reducing no-shows and eliminating the back-and-forth that consumes hours of an agent's week.
- **Behavior-Triggered Follow-Up Sequences:** When a lead views a listing, opens an email, or goes quiet after an initial inquiry, the system responds automatically with a relevant, timely touchpoint. Similar property suggestions after a viewing. A check-in message after three days of silence. An open

- house reminder for leads who expressed interest in a specific neighbourhood. Every trigger mapped to the right response.
- **Post-Showing Feedback & Review Requests:** After every showing, an automatic message collects structured feedback on the property — what worked, what did not, what the buyer is still looking for. This intelligence sharpens future recommendations. For satisfied clients post-close, a timed review request captures the positive experience at exactly the right moment.
- **Weekly Lead Summary & Hot-Lead Alerts:** A weekly automated summary delivers a clear picture of lead pipeline status — new inquiries, active follow-up sequences, showing conversion rates, and leads flagged as high-priority based on engagement behaviour. Hot-lead alerts go out in real time when a lead's activity signals they are ready to move.

THE COST OF NOT ACTING

Most real estate agents significantly underestimate how many leads they are losing to slow response times and inconsistent follow-up — because lost leads are invisible. The inquiry that came in at 10pm and received a response the next morning is not recorded as a loss anywhere. The lead that needed six touchpoints to convert but only received two is not tracked as a missed opportunity. The showing that was never booked because scheduling took too long does not appear on any report.

The Audit phase of this engagement makes that invisible loss visible — by mapping your current lead journey end-to-end and quantifying, as accurately as the data allows, what is slipping and what it is worth.

HOW WE WORK TOGETHER

Three clear steps. Built around your transaction calendar.

STEP 01 • AUDIT • One-time fixed fee

- Map your complete lead journey from first inquiry to closed transaction
- Identify every point where leads are dropping, slowing, or going cold
- Quantify the estimated commission value of current lead leakage
- Recommend 3 to 5 specific AI workflows ranked by revenue recovery potential
- Written findings delivered within 5 business days — yours to keep regardless of next steps

STEP 02 • BUILD • Per workflow — modular

- Configure 24/7 lead capture and instant response across all your active channels
- Build lead qualification and timeline scoring workflow
- Set up automatic showing scheduling with your calendar and reminder sequences
- Activate behavior-triggered follow-up sequences for key lead actions
- Deploy post-showing feedback collection and review request automation
- Configure weekly lead summary and real-time hot-lead alert system

STEP 03 • SUPPORT • Monthly subscription

- Monthly review of lead capture volume, response rates, and showing conversion
- Adjust qualification questions and follow-up sequences based on what is converting
- Seasonal workflow updates — spring market, summer slowdown, fall re-engagement
- Add new channels or trigger sequences as your practice grows
- Direct access to your Borrón Strategic advisor — no ticket queues, no junior staff

COMPLETE PACKAGE DELIVERABLES

- 1. Lead Journey Audit Report:** A written end-to-end map of your current lead process with specific automation opportunities ranked by estimated commission recovery value — clear, jargon-free, and actionable whether or not additional phases are purchased.
- 2. 24/7 Lead Capture & Instant Response System:** Configured across your website, listing portals, and social channels — captures contact information, acknowledges every inquiry immediately, and begins the qualification sequence without any manual intervention.
- 3. Lead Qualification & Scoring Workflow:** Custom qualification questions and scoring logic built for your target buyer and seller profiles — so you know which leads deserve your immediate personal attention and which can be nurtured automatically.
- 4. Showing Scheduler with Automated Reminders:** Calendar-synced booking system with confirmation, 24-hour reminder, and same-day reminder sequences — reducing no-shows and eliminating scheduling back-and-forth for both buyers and listing appointments.
- 5. Behavior-Triggered Follow-Up Sequences:** Automated touchpoint sequences mapped to specific lead actions — property views, email opens, inquiry silence, and post-showing activity — so no lead goes cold for lack of timely, relevant communication.
- 6. Post-Showing Feedback & Review Automation:** Structured feedback collection after every showing to refine future recommendations, plus a timed review request sequence for clients post-close — capturing five-star reviews at exactly the right moment.
- 7. Weekly Lead Summary & Hot-Lead Alert System:** Automated weekly pipeline summary delivered to your inbox, plus real-time alerts when a lead's engagement behaviour signals they are ready to move — so your highest-priority opportunities never get buried in the week's noise.

RETURN ON INVESTMENT CONTEXT

The following figures are illustrative benchmarks drawn from published research on AI adoption in residential real estate. Actual results will vary by market conditions, lead volume, and individual agent practice.

- **Additional qualified leads per month:** 15 to 20 leads recovered from after-hours and unresponded inquiries — leads that would otherwise have gone to a competitor.
- **Increase in showing bookings:** AI follow-up sequences have been shown to increase showing bookings by approximately 35 percent compared to manual follow-up alone.

- **Improvement in lead-to-client conversion:** Consistent, behavior-triggered follow-up has been associated with conversion rate improvements of up to 29 percent.
- **Commission value of recovered leads:** At San Diego median property values, each recovered qualified lead represents a potential commission value of [\$ Insert Estimated Value] — making the cost of this package a fraction of a single recovered transaction.

Borrón Strategic does not guarantee specific revenue outcomes. These benchmarks are provided to illustrate the order of magnitude of opportunity and to assist in evaluating the investment case.

INVESTMENT

Audit: [\$ Insert Fee] — One-time, fixed. Payable prior to commencement. Includes full lead journey mapping and written recommendations.

Build: [\$ Insert Fee / workflow] — Per workflow, modular. Invoice issued at the start of each phase. Minimum recommended build is 3 workflows for meaningful impact.

Support: [\$ Insert Fee / month] — Monthly subscription. Includes performance review, sequence optimisation, and direct advisor access. Cancel with 30 days written notice.

TERMS & CONDITIONS

- This offer is valid for 30 days from the date shown above.
- All work and communications are treated with strict confidentiality.
- Work commences upon receipt of signed agreement and agreed deposit.
- Scope changes beyond this offer will be quoted separately in writing.
- Either party may terminate the Support phase with 30 days written notice.
- ROI benchmarks cited in this document are drawn from published industry research and are illustrative only. Borrón Strategic Intelligence does not guarantee specific lead, showing, or conversion outcomes.
- Borrón Strategic Intelligence retains the right to reference the engagement type (not client name or transaction details) for portfolio purposes unless confidentiality is specifically requested in writing.
- This offer does not constitute legal, financial, or investment advice. Clients are advised to consult appropriate licensed professionals regarding California DRE compliance obligations related to any client communication tools.

AGREEMENT & AUTHORISATION

By signing below, both parties agree to the scope, deliverables, and terms described in this offer document. Work will commence upon receipt of the signed agreement and any applicable deposit as agreed.

Client Signature: *[Signature]*

Date: *[Date]*

Printed Name: *[Printed Name]*

Title: *[Title / Role]*

BSI Authorised: *[Borron Strategic]*

Date: *[Date]*