



Real estate

Enhance client interactions with tech: A guide + checklist for real estate

This guide and checklist was built to help real estate businesses like yours understand how technology can transform everyday interactions with clients.



Introduction

Today, the world economy relies on simple everyday interactions between customers and businesses that add up to huge economic impact. Within the real estate industry, every touchpoint with clients has the potential to increase trust, loyalty, and word-of-mouth referrals—or to do the opposite.

Property is one of the biggest purchases people make, and they're much more likely to turn to businesses with a reputation for providing an excellent client experience at every touchpoint. Positive interactions and high customer satisfaction overall are vital.

The case for better client interactions:

80%

regard the experience a company provides as just as important as its products or services

32%

will stop doing business with a brand they love after one bad experience

59%

will walk away from a business after several bad experiences

Tech-enabled automation and collaborative technology tools, including those powered by artificial intelligence (AI), are transforming everyday client interactions into impactful, trust-building moments. Research has shown that genAI could generate **\$110 billion to \$180 billion** or more in value for real estate businesses—but with the rapid pace of innovation, the industry has yet to capitalize on the latest tech advancements.

From streamlined onboarding to faster internal due diligence, the benefits of today's technology solutions give agents the power to improve every interaction for clients. As client expectations continue to evolve, staying ahead with the right tech investments will be key to improving your business' reputation, client retention, and ultimately ROI.

Checklist: Assess tech's role in your client experience

Use the checklist to assess whether your current tech stack offers the features and capabilities necessary to enhance client interactions for improved ROI. Beyond AI, we'll explore how key technology features can be used to your advantage. If you don't have these features, it might be time to consider a new technology solution.

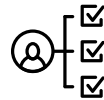


Employee-client interactions

Improving interactions between employees and clients is key to elevating the overall client experience. The faster and more accurate your responses, the more a client is likely to trust your information and feel comfortable making decisions quickly. Technology is one of the most impactful ways real estate businesses can deliver personalized and efficient service.

Does your current tech stack:

- ☐ Consolidate client workflows, documents, and conversations across platforms and channels so you can take action sooner
- ☐ Leverage AI or automated workflows to enable personalized client interactions
- ☐ Offer tools for collecting and analyzing client feedback
- ☐ Easily integrate with third party apps to reduce manual client entry



Streamline service offerings with process efficiencies

Manual tasks such as data entry and document preparation are notoriously prone to human error and often get in the way of real estate businesses delivering consistently positive client interactions. The right technology should help automate these routine tasks to minimize errors and streamline your team's day-to-day. The following checklist items will help you assess whether your current software ensures accuracy and efficiency in these ways.

Does your current tech stack:

- ☐ Automate key documents and client workflows so you can assist clients more efficiently
- ☐ Feature an intuitive document management system to quickly find resources that help clients make a decision
- ☐ Offer a centralized location to build, collaborate, and manage work with internal and external users when preparing agreements
- ☐ Scale with business growth



Safeguard client and company data

Data security is vital to protecting sensitive client and company data and enhancing trust and integrity in client relationships. Clients trust real estate companies that take data privacy and compliance seriously, especially considering how frequently the industry is targeted by hackers. It's important to choose technology that protects sensitive information and helps your organization remain compliant with changing legal standards and regulations.

Does your current tech stack:

- ☐ Offer data access and user authentication security features to protect internal and external workflows
- ☐ Support compliance with the most recent data protection regulations
- ☐ Include file encryption for always-on content protection
- ☐ Offer granular document sharing controls

Check all the boxes with ShareFile

As your real estate business evolves with technology to support better client interactions, ShareFile can help you simplify and streamline workflows while keeping them protected. Through the power of automation and a customer-first framework, we partner with you to build efficiencies so you can focus on the work that's most meaningful to you and your clients.

Learn more about partnering with ShareFile to enhance client interactions through collaborative technology.