E EXOTICA IT SOLUTIONS
AI AUTOMATION & SOFTWARE DEVELOPMENT

CAPABILITY DOCUMENT

FOR REAL ESTATE OPERATORS

REAL ESTATE AI & AUTOMATION

Automate the work behind your real estate operation.

We don't add another AI tool to your business. We automate the work happening between the tools and people you already use — leads, CRM, transactions, documents, listings, communication and reporting.

LEAD & FOLLOW-UP AUTOMATION · CRM & PIPELINE · TRANSACTION COORDINATION · DOCUMENTS & COMPLIANCE · CUSTOM SOFTWARE

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Brokerages · Agents · Property operators · Proptech · Lending

OUR SERVICES

AI AUTOMATION & SOFTWARE SOLUTIONS FOR REAL ESTATE

We help real estate businesses automate the repetitive work across lead generation, CRM management, follow-up, transactions, documents, listings, communication and reporting.

01 Lead capture & follow-up

Websites, forms, ads and portals feed one flow: instant response, qualification, scoring, CRM creation, routing, scheduling and long-term nurture.

Capture the lead, respond immediately, qualify automatically, keep following up.

02 CRM & pipeline automation

Record updates, pipeline movement, lead assignment, task creation, stale-lead detection, reactivation and internal notifications.

Turn the CRM from a database into an active operating system.

03 Transaction & deal coordination

Contract to close: milestones, task assignment, deadline tracking, document collection, inspection / lender / escrow follow-ups and stakeholder updates.

Keep every transaction moving without someone chasing each update.

04 Document & compliance automation

Intake, classification, data extraction, missing-document detection, signature checks, compliance checklists, deadline monitoring and centralized records.

Process and monitor transaction documents without opening every file.

05 Listing & property automation

Property data collection, address lookup, enrichment from public records, data standardization, description generation and media workflows.

Turn property data into ready-to-use listing information with less manual work.

06 Client & team communication

Buyer, seller and investor updates, appointment reminders, transaction notifications, internal alerts, email and SMS sequences.

Keep clients and teams informed without chasing every conversation.

07 Reporting & business intelligence

Lead-source and pipeline reporting, agent performance, transaction status, conversion tracking and operational dashboards for management.

Turn scattered operational data into one clear view of the business.

08 AI agents & custom software

AI assistants and agents, custom dashboards, internal portals, data pipelines, API integrations and AI document processing.

When off-the-shelf software does not fit the process, we build the missing layer.

WHAT WE AUTOMATE

WE AUTOMATE THE WORK BEHIND YOUR REAL ESTATE OPERATION

Real estate businesses already use CRMs, websites, forms, calendars, email platforms and transaction systems. The problem is usually the manual work happening between them.

We connect those systems and automate the repetitive, rule-based processes that consume your team's time.

LEADS	Capture → Qualify → Route → Follow up
CRM	Update → Assign → Track → Reactivate
TRANSACTIONS	Create → Track → Remind → Complete
DOCUMENTS	Collect → Extract → Verify → Flag
LISTINGS	Collect → Enrich → Generate → Publish
COMMUNICATION	Trigger → Personalize → Send → Track
REPORTING	Collect → Consolidate → Analyze → Report

> Real estate businesses don't need more tools. They need their existing tools, people and processes to work together — we build the automation layer that connects them.

WHAT WE UNDERSTAND

WHAT WE UNDERSTAND ABOUT REAL ESTATE OPERATIONS

The challenge usually isn't a lack of software. It's the manual work required to move information from one person, platform or stage to another.

LEADS COME FROM EVERYWHERE

Website forms, ads, portals and referrals create multiple entry points.

PROBLEM Leads can sit without an immediate response or consistent follow-up.

AUTOMATION **Capture → qualify → route → respond → nurture.**

CRM DATA BECOMES OUTDATED

Teams manually update lead status, activities and pipeline stages.

PROBLEM The CRM no longer reflects what is actually happening.

AUTOMATION **Records update from conversations, appointments and workflow events.**

TRANSACTIONS CREATE ADMIN LOAD

Multiple parties, documents, deadlines and milestones must be tracked.

PROBLEM Time goes into chasing updates and checking what was completed.

AUTOMATION **Automated tasks, reminders, status updates and document tracking.**

DOCUMENTS NEED REPETITIVE REVIEW

Transaction files carry many documents and compliance requirements.

PROBLEM Manual checking takes time and raises the risk of a miss.

AUTOMATION **Extract, classify, validate and flag.**

PAST LEADS GET FORGOTTEN

Old leads and past clients sit in the CRM without consistent engagement.

PROBLEM Potential future business stays dormant.

AUTOMATION **Reactivation and long-term nurture campaigns.**

MANAGEMENT LACKS ONE CLEAR VIEW

Operational data is spread across multiple systems.

PROBLEM Reporting becomes manual and slow.

AUTOMATION **Centralized data and automated dashboards.**

HOW WE SUGGEST SOLVING IT

WE START WITH YOUR PROCESS – NOT A PRODUCT

We don't recommend automation simply because a process can be automated. We first understand how your team works, identify where repetitive work is creating friction, and then determine what should be automated, what should stay human-controlled and which existing systems should be connected.

01

UNDERSTAND

Map the current workflow — who touches what, in which system, and at which point.

02

IDENTIFY

Find the repetitive, rule-based and time-consuming steps worth automating first.

03

CONNECT

Integrate the systems already in use, so data moves without a person moving it.

04

AUTOMATE

Build, test and deploy the workflow — then extend it phase by phase.

→ **THE OBJECTIVE IS NOT TO REPLACE YOUR EXISTING BUSINESS SYSTEMS. IT IS TO MAKE THEM WORK TOGETHER.**

THE SHIFT

FROM MANUAL WORK TO AUTOMATED OPERATIONS

TODAY	AUTOMATED
Lead arrives Someone checks the source and manually responds.	**Lead arrives** System captures, qualifies, routes and triggers immediate follow-up.
Follow-up depends on memory Agents remember who needs a call or email.	**Follow-up runs automatically** Sequences continue until the lead responds, books or hits a stop condition.
CRM is updated manually Team members enter activities and move records between stages.	**CRM stays current** Workflow events update the right records and stages.
Documents are checked manually Team members open files and verify required information.	**Documents are processed systematically** Files can be classified, information extracted and gaps flagged.
Deadlines live in calendars or memory	**Deadlines trigger tasks and alerts**
Team members chase updates	**Stakeholders receive automated updates**
Reports are prepared manually	**Operational data flows into dashboards**

ONE CONNECTED SYSTEM. LESS MANUAL WORK BETWEEN EVERY STAGE.

The goal isn't to add another AI tool to your business. It's to remove the repetitive work happening between the people, platforms and processes you already use.

REAL ESTATE CASE STUDY

REAL ESTATE TECHNOLOGY

MYLISTIQ

Listing & lead operations rebuilt for automation.

CHALLENGE

Listing and lead workflows needed to scale without manual review at every step, while data arrived from multiple sources in different formats — creating inconsistent records and slow, uneven follow-up.

WHAT WE BUILT

01 Automated lead capture and routing tied directly into the CRM.

02 Workflow automation that removed manual handoffs between stages.

03 A consolidated data pipeline standardizing listing data across sources, with AI property description and image workflows.

DELIVERED SCOPE

6

WORKFLOWS AUTOMATED

Import, enrichment, routing, agent administration, media and billing.

3

DATA SOURCES UNIFIED

County records, CSV imports and inbound lead sources standardized into one pipeline.

0

MANUAL HANDOFFS

No stage depended on someone manually passing a listing or lead to the next step.

These counts describe the delivered scope of this build — not a projected performance claim.

RESULTS

FROM TRIAGE TO PIPELINE

Lead handling moved from manual sorting to an automated flow.

FASTER, CONSISTENT FOLLOW-UP

Every inbound lead could follow the defined automated workflow regardless of source.

> “The automation brought by Rohit's team cut our manual compliance work substantially and improved accuracy across the board.
>
> SANDEEP T. · LOGICCLOSE

> “Working with Exotica gave us automation that actually fit how our team operates day to day.
>
> JOHNSON A. · 8TWELVE MORTGAGE

WHY EXOTICA

PROCESS-FIRST

We design around the way your team actually operates instead of forcing the business into a generic workflow.

EXISTING SYSTEMS

We connect the platforms you already use rather than asking you to replace them.

AI + AUTOMATION + DEVELOPMENT

We combine workflow automation, AI and custom software when a standard tool is not enough.

END-TO-END DELIVERY

Discovery, workflow design, integrations, development, testing, deployment and ongoing support.

BUILT TO BE OWNED

Every system is designed to be understood, maintained and extended by your own team.

WE WORK ACROSS YOUR EXISTING STACK

CRM

Salesforce, HubSpot and other CRMs

AUTOMATION

n8n, Make, Zapier and custom workflows

AI

OpenAI, Claude, Gemini and other models

BUSINESS SYSTEMS

Calendars, email, SMS, forms, transaction systems, APIs

DEVELOPMENT

Python, APIs, databases, dashboards, web apps

IS THERE A PROCESS YOUR TEAM IS STILL RUNNING MANUALLY?

Show us one workflow that currently takes repetitive manual work. We'll help identify what can realistically be automated, which systems need to connect, and what a practical first phase could look like.

LET'S MAP ONE WORKFLOW

A short conversation about your current process — not a sales presentation.

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