

5 Key Strategies to Automate the Leasing Process

Boost Revenue and Lower Cost with Tech-Driven Solutions

ESSENTIAL TECHNIQUES EXPLORED IN THIS YARDI EBOOK

- Streamlined Listing Management and Distribution
 - Complete Lead-to-Lease Deal Pipeline Overview
 - Advanced Deal Economics and Real-Time Data
 - Automated Lease Documents
 - Easy-to-Implement Technology
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INTRODUCTION

The key goal of a revenue-focused CRE software solution should be to drive higher revenue while lowering operational costs by automating key processes, saving time and optimizing resources.

When it comes to growing revenue, the two main levers are: Increasing lead and deal volume and maximizing the profitability of executed deals.

As for reducing costs, automated deal and marketing workflows play a critical role. The best technologies eliminate duplicate data entry, reduce manual work, prevent errors, and break down data silos, enhancing listing and pipeline management while lowering costs.

Additionally, the [best CRE deal-making software](#) gives owners and property managers full visibility into their deal pipeline and portfolio throughout the leasing process. With real-time insights, CRE leaders can make better business decisions and drive higher performance.

To capitalize on evolving market conditions and maintain a competitive advantage in the shifting CRE realm, organizations should consider incorporating [end-to-end leasing software](#) into their strategy to enhance efficiency and maximize profitability.

STREAMLINED LISTING MANAGEMENT AND DISTRIBUTION

Successful CRE marketing leverages various channels, including emails, brochures, listing sites and social media, all requiring management from different platforms. Completing this resource- and time-intensive task manually often results in outdated, inconsistent and inaccurate content.

A comprehensive marketing software centralizes content management and automatically updates all marketing channels: The firm's website, top marketplaces, customized emails and property brochures. By significantly reducing manual efforts, leaders can focus less on processes and more on marketing performance and strategy.

Automated syndication is a vital component of your [CRE marketing solution](#) that eliminates the need to duplicate listings. Property details and availability are updated across multiple CRE listing services and marketplaces, including your corporate website, ensuring the broadest exposure possible and amplified lead generation.

Further efficiency can be gained with automated listing updates, ensuring listings are published or removed based on availability. A **centralized platform** for listing management simplifies this process, keeping marketing content accurate and up-to-date across all channels.

Custom, **automated email marketing** campaigns play a crucial role in enhancing lead generation. Built-in tools enable the creation of email templates auto-filled with accurate property details, support targeted outreach and track engagement metrics. Best of all, these capabilities are seamlessly integrated within the Microsoft Outlook inbox.

Did you know?

The [CommercialEdge Listing Network](#) secures first-page visibility on Google and incorporates three CRE marketplaces: CommercialSearch, CommercialCafe and PropertyShark. These generate more than 2 million monthly visits and over 350,000 quality leads annually.



“An added benefit of CommercialEdge Marketing is the convenience of updating listings in one place and automatically syncing those changes across every platform where you want to promote your spaces.”

Matt Gleason, Senior Solutions Consultant, Commercial, Yardi



COMPLETE LEAD-TO-LEASE PIPELINE OVERVIEW

With marketing successfully automated, the **lead-to-lease** process becomes the next priority. Disconnected processes are among the main factors that stall deal timelines. Fragmented team communication, tenant information spread across disparate systems and a lack of pipeline visibility all contribute to restricted deal velocity.

Deal-making can be delayed due to limited visibility into lead type and volume, tour activity, market conditions, lease expirations and tenant details. That's why having **full insight** into your current tenant data and deal pipeline is essential for driving more deals forward.

Having all this data pulled from your property management system in real time is key to ensuring seamless lead-to-lease workflows. Automatically generated stacking plans and floorplans take this further, helping teams make informed decisions faster by providing visual insights into space utilization and tenant mix.

Tracking communications, tasks and activities in a centralized platform is essential for efficient

deal-making and management visibility. Additionally, intuitive **approval workflows** add an important checkpoint to deal quality without slowing down the process.

A browser-independent, native **mobile app** for tracking deals, viewing stacking plans and collaborating with team members further enhances efficiency, keeping on-the-go agents connected and productive, no matter where they are.

Finally, letters of intent (LOIs) can be automatically created with advanced legal software that ensures customized, accurate lease documents with minimal effort from leasing teams.

Did you know?

With **Deal Manager**, you can receive a daily email of all deal activity that happened on the prior day, as well as which spaces are coming up for expiration in the next 3-6 months.

ADVANCED DEAL ECONOMICS AND REAL-TIME DATA

Automation is also essential when it comes to **data management and deal economics**. At the basic level, firms want to see the deal's start date, rent schedule, tenant improvement cost and term. More quantitative firms will want insights on the net effective rent (NER), which is the discounted net rent (after all expenses) averaged across the lease term.

The most advanced firms will then need to compare the NER to either the underwriting budget for the space, the annual budget, the prior lease or a combination of the three. If systems are disconnected, the dealmaker or the asset management team has to track down this data, put it into a side-by-side comparison and show it to a sequence of managers who need to approve the deal. This manual process is prone to delays, errors and miscommunication.

A **connected deal management software** will calculate the NER automatically and pull all relevant comparisons with no effort from the

dealmaker. The underwriting budget, annual budget and prior lease, typically stored in the core property management system, should be fully integrated, allowing it to be pulled into the deal management solution in real time.

Approval workflows can then be linked to deal comparisons, giving managers full visibility into how each deal aligns with the budget before approving it. This data-driven approach helps prioritize the most profitable leases, making the deal management solution a key driver of revenue growth.


Did you know?

Yardi Voyager clients can have their underwriting budget, annual budget and prior lease economics pulled automatically into **Deal Manager**, for quick, real-time comparison of a deal's NER to those budgets.



"Access to real-time data for deal economic comparison doesn't have to mean pulling budgets and prior lease info manually. Deal Manager gives asset managers an in-depth view of advanced deal metrics, automatically comparing proposals against prior leases and approved budgets."

Turner Levison, Director, Yardi



AUTOMATED LEASE DOCUMENTS

Once a deal has been approved, the next step is to create a lease. Unlike residential leases, commercial leases have long been considered too unique to automate. Fortunately, this mindset has changed. New lease automation solutions can generate even complex lease documents with **minimal input** from legal teams. While a perfect lease isn't always guaranteed, the time to finalize one can be reduced by 80-90% or more.

What constitutes a **sophisticated lease automation** solution? The ability to create lease and addenda templates, store clauses and options in libraries and organize them into groups (e.g., one for triple net industrial leases and another for retail leases) that can be quickly added to a lease template and full integration with your deal management solution. Together, these features enable the creation of unique lease documents in just a few clicks.

Once the lease document is created, editing, internally approving and tracking redlines can all be completed directly within the platform. After the document is ready to be signed, secure e-sign functionality ensures a **seamless process** while keeping all parties informed on document status, including leasing agents, who often lack visibility into the lease's progress in the negotiation process.

Did you know?

CommercialEdge Legal plugs directly into Deal Manager to ensure a seamless process from lead to signed lease while keeping all parties in the loop.



"One of our core values is relentless improvement. When we look at how to scale the business, we always look at technology as the key driver."

Mike Bodendorf, Senior Vice President, Operations, Realterm



EASY-TO-IMPLEMENT TECHNOLOGY

In order to prevent disruptions, CRE leasing software should be easy to adopt and integrate seamlessly with existing data systems. Such solutions should also provide access to **real-time tenant and lease data**, including rent schedules, options, clauses and expenses.

Technology that syncs with existing data systems should also provide complete **portfolio** visibility across leases and assets. Without integration, the data is stuck in a vacuum.

Working with a **fully integrated, end-to-end platform** enhances data accuracy and saves time on operations, lease execution and

analytics. With system-wide **transparency**, consolidated CRE leasing software allows you to manage the entire business lifecycle from a single dataset.

Did you know?

The **Yardi** property management, forecasting, construction and deal management solutions are **fully integrated**, ensuring a seamless connection and enabling a significantly faster launch.



“Yardi provides a consolidated data source for your entire portfolio, with maximum transparency across your organization and access to real-time tenant and lease info. Simply put, you gain a single source of truth to drive your decision-making.”

Arjun Rao, Senior Director, Commercial, Yardi

Well-established leasing strategies bolster and automate operations while empowering industry leaders to make informed decisions and stand out among tight competition in a rapidly evolving CRE landscape.

Commercial real estate organizations equipped with intuitive and innovative leasing solutions that drive more leads and accelerate deal timelines are best positioned to overcome potential challenges and maintain a competitive edge in a dynamic CRE market.



Marketing

Boost demand with automated listings, powerful email marketing, syndication to top marketplaces and real-time visibility into occupancy and availabilities.



Deal Manager

Close better deals faster with simplified deal entry, sophisticated deal analysis and customizable approval workflows — from anywhere.

See the CommercialEdge solutions in action Get a Demo



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