

How to Choose Marketing Tech for Your Brokerage

Ask yourself these **3 questions** to save time, activate data, and stay in control.

1428 Brandywine Creek Rd., Wilmington
4 Bed | 3 Bath | 2,850 Sq Ft | \$750,000



Luxury waterfront home with stunning sunset views

[Learn More](#) [Compare with AI](#)

 James T.
Active Realty

Days on Market	Listing Price	Rating
40	\$750k	8/10

2155 Maple Ridge Drive, Bellevue
3 Bed | 2.5 Bath | 2,000 Sq Ft | \$625,000



Modern craftsman in highly desirable neighborhood

[Learn More](#) [Compare with AI](#)

 Erika G.
Active Realty

Days on Market	Listing Price	Rating
30	\$625k	7/10

847 Lakeshore Boulevard, Seattle
5 Bed | 4 Bath | 3,200 Sq Ft | \$819,000



Contemporary masterpiece with premium finishes

[Learn More](#) [Compare with AI](#)

 Taylor S.
Active Realty

Days on Market	Listing Price	Rating
10	\$819k	



now

Good morning!
5 high-intent sellers need your attention!



You paid for the tool. You rolled it out. And then, almost no one used it.

Did you make the wrong investment or was it just never built for your brokerage in the first place?

At the time, the decision made sense. The platform promised to solve your brokerage challenges, but under the surface, it quietly required agents to change how they work.

If a tool only delivers value when agents can slow down, sit still, and focus uninterrupted, it is not aligned with the reality of this industry.

And when a tool doesn't fit, the cost is not just financial. It shows up as lost momentum, missed opportunities, and leadership fatigue.

The Framework: How to Evaluate Marketing Tech for Real Estate

Our framework is designed to help you evaluate real estate marketing platforms through three practical questions.

1 Does it save time?

Will it reduce decision fatigue and friction in an agent's day?

2 Does it drive action?

Will it surface opportunities at the right moment, or rely on agents to remember, search, and follow up?

3 Does it give you control?

Does it protect your brand, respect agent data ownership, and make system behavior visible and understandable?

Each section identifies what to look for, what to watch for, and exactly what to ask during a demo once you find a product that looks promising.



Does It Save Time?

Agents want tools that help them get more done and give them time back at home. The problem is when a platform delivers one without the other.

That's why the first question when evaluating any real estate platform is simple: **Will it save time - for you and for your agents?**

Not just on quiet days. Not just in the office. But on the move, between appointments, in the car.

“How do I get my time back? That’s the number one question I ask myself every day.”

– Lauren Huffman, Team Leader, Land and Home Group, EXIT Realty Southern

Does It Save Time?

What to Look For

Agents already make hundreds of decisions every day. Who to call. What to send. What's urgent. What can wait. And, of course, those decisions take time.

The right technology reduces that decision load, without taking control away from the agent (more on that, later.)

Look for platforms that replace choices with clear direction. In practice, that means showing agents who's paying attention and telling them what to do next.

When time is tight, the best tools make it immediately clear what matters now and remove everything else.

Sales professionals spend only 30% of their time actively selling. The rest is taken up by administration and internal tasks.

– Salesforce

Does It Save Time?

What This Looks Like in Practice

Picture this: rather than opening their database and trying to work out who might be ready to buy or sell, agents start the day with clear priorities: this person needs attention, here's why, and here's the next step.

That direction should come from real client and listing activity, so agents can spend less time sorting information and more time acting on timely tasks and relationship building opportunities.

In a tool that is built for agents, the follow-up and content should already be there and on brand. Agents can then approve it, tweak it, or skip it and move on.

Time is saved not by working faster, but by removing the friction that slows agents down in the first place.

Brokers worldwide are spending more time on administrative tasks, with

30% dedicating five to 10 hours per week

41% spending 11 to 20 hours.

- Finova

Does It Save Time?

What to Avoid

Now you know what to look for and why it matters. Here are a few signals that a tool is likely to slow agents down instead of saving time.

- ✗ Relies on agents to manually build or schedule campaigns on an ongoing basis
- ✗ Only works when agents maintain consistent habits or routines
- ✗ Requires extensive setup, configuration, or training with no early wins or immediate value
- ✗ Stops delivering results as soon as agents get busy



Does It Save Time?

What to Ask During a Demo

So, you've found a tool you like the look of. Ask these questions in the demo to see if it will really save time day to day.

- ? Show me how an agent creates a CMA or listing presentation faster using this tool.
- ? What tasks does this remove entirely from an agent's day?
- ? What can an agent realistically get done in five minutes between appointments using this tool?
- ? How does the system surface time-sensitive opportunities without manual input?



Tip: Go into the demo knowing what matters most to you. It makes it much easier to see whether the tool truly addresses your pain points.

Does It Drive Action?

You don't need another platform that just stores and collects data.

When that happens, the agent still has to remember and decide to take action and know what action to take. In other words, the technology isn't really doing the work - and neither is their database.

That's why the second question you should ask when evaluating a platform is: **Does it drive action or just collect information?**

61% of property owners would prefer to use the same agent again.

45% of those leads are lost by agents each year.

-The Trust Report from ActivePipe

Does It Drive Action?

What to Look For

Referrals rarely arrive as explicit hand-raises. They show up as small signals - engagement with market updates, changes in behavior, renewed activity after long periods of silence - and they only matter if the system surfaces them while timing is still on your side.

Look for platforms that continuously monitor the database and elevate moments that require action before relationships go cold. If agents have to dig through dashboards, interpret activity, or remember to follow up later, those opportunities are easy to miss.

Storage preserves information.
Activation drives revenue.



Two-thirds of transactions come from repeat/referral business.

– NAR 2023

Does It Drive Action?

What to Avoid

A platform is likely storing data (not activating it) if it:

- ✗ Requires agents to decide who to contact next
- ✗ Relies on manual reminders, task creation, or record updates
- ✗ Shows information in dashboards that agents have to check, instead of prompting action
- ✗ Only works if contacts are perfectly organized and kept up to date



Does It Drive Action?

What to Ask

Use these questions to determine whether a platform actually drives action or simply stores information:

- ? How does the system decide who needs attention next, and why?
- ? What signals are surfaced automatically, without agents doing anything?
- ? How are referral or follow-up opportunities identified before they go cold?
- ? If an agent does nothing, does the system still surface clear priorities?



Tip: In a demo, ask to see what happens when a client clicks, views, or engages with content. If the system automatically elevates that activity and suggests next steps, it is activating the database. If not, the signal is likely being stored and forgotten.

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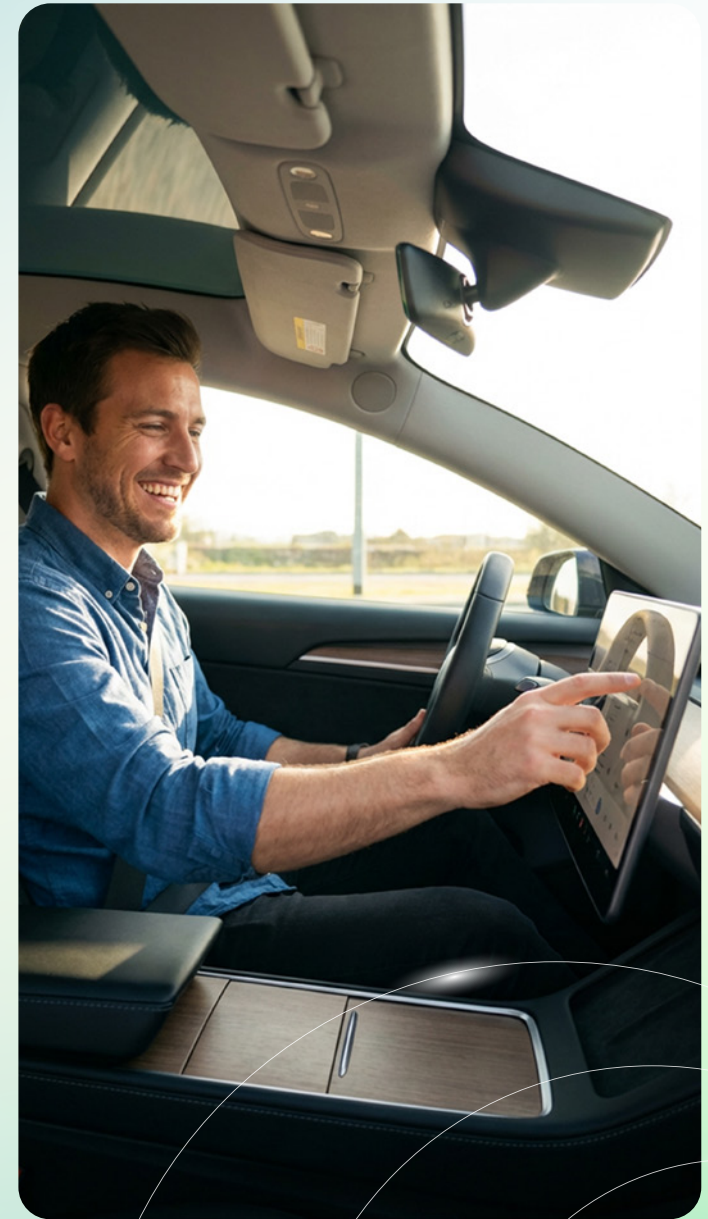
Does It Give You Control?

Control matters to both brokers and agents, just in different ways.

Brokers need control over branding. Agents need control over their own data. And everyone needs clarity over what the platform is doing and why.

Which brings us to our final question in our framework:

Does it put you and your agents in the driver's seat?



Does It Give You Control?

What to Look For

Look for platforms with automation and agency built-in.

Agents should be able to review, understand, and approve suggested actions before anything goes out, with clear visibility into what triggered each recommendation.

The system itself should be transparent – showing what was suggested, what was executed, and why.

Brokerage branding should be applied by default and protected across templates, automations, and agent-facing materials, so communications stay consistent without agents having to manage it manually.



Does It Give You Control?

What to Avoid

A platform is likely to reduce control if it:

- ✗ Makes it difficult for brokers to review or adjust branding across templates, automations, or agent-facing materials
- ✗ Is unclear about who owns agent contacts and data, or what happens to that data over time
- ✗ Triggers actions automatically without showing what caused them
- ✗ Surfaces recommendations agents cannot easily review, edit, or skip
- ✗ Asks users to trust the system without visibility into how decisions are made



Does It Give You Control?

What to Ask

Use these questions to assess how control is handled across the platform:

- ? How does the brokerage control branding throughout the system?
- ? Who owns agent contacts and data and what happens if an agent leaves?
- ? When the system suggests an action, can you show what triggered it?
- ? Can agents review, edit, or skip recommendations before anything goes out?
- ? How visible is what the platform is doing in the background?



Tip: In the demo, watch how the system handles suggested actions. If you cannot see what triggered them, review them, or approve them before execution, that could be a risk.

RISE

By  MoxiWorks

Put RISE to the Test

Now, it's your turn. Book a demo with our team and put RISE to the test using the three-question framework in this guide.

RISE is our real estate AI marketing platform that doesn't just answer questions; it surfaces what agents didn't even know to ask, then builds the campaigns, emails, and presentations that close more deals.

We'd love to show you how it works.

Book a Demo

“RISE was built for the way agents really work, always on the go.”

– Ashley Fidler, CPO at MoxiWorks

Get in touch at moxiworks.com or say hi at engage@moxiworks.com