BROKERAGE AUTOMATION

From inquiry to deal room, without anyone touching an inbox

How every buyer lead moves through our system, shown with a real listing: Broward County Residential Cleaning.

THE FLOW

Six steps, one system, no manual handoffs

1

Buyer inquires

On BizBuySell or your listing page, and the lead is routed to the right brand inbox.

2

NDA invite

Sent automatically from your brand's own email address.

3

Buyer signs

A binding e-signature on the listing page.

4

You're alerted

With the buyer's details, budget and intent, and the buyer is added to the CRM.

5

Access granted

A private data-room link for that buyer.

6

Deal room

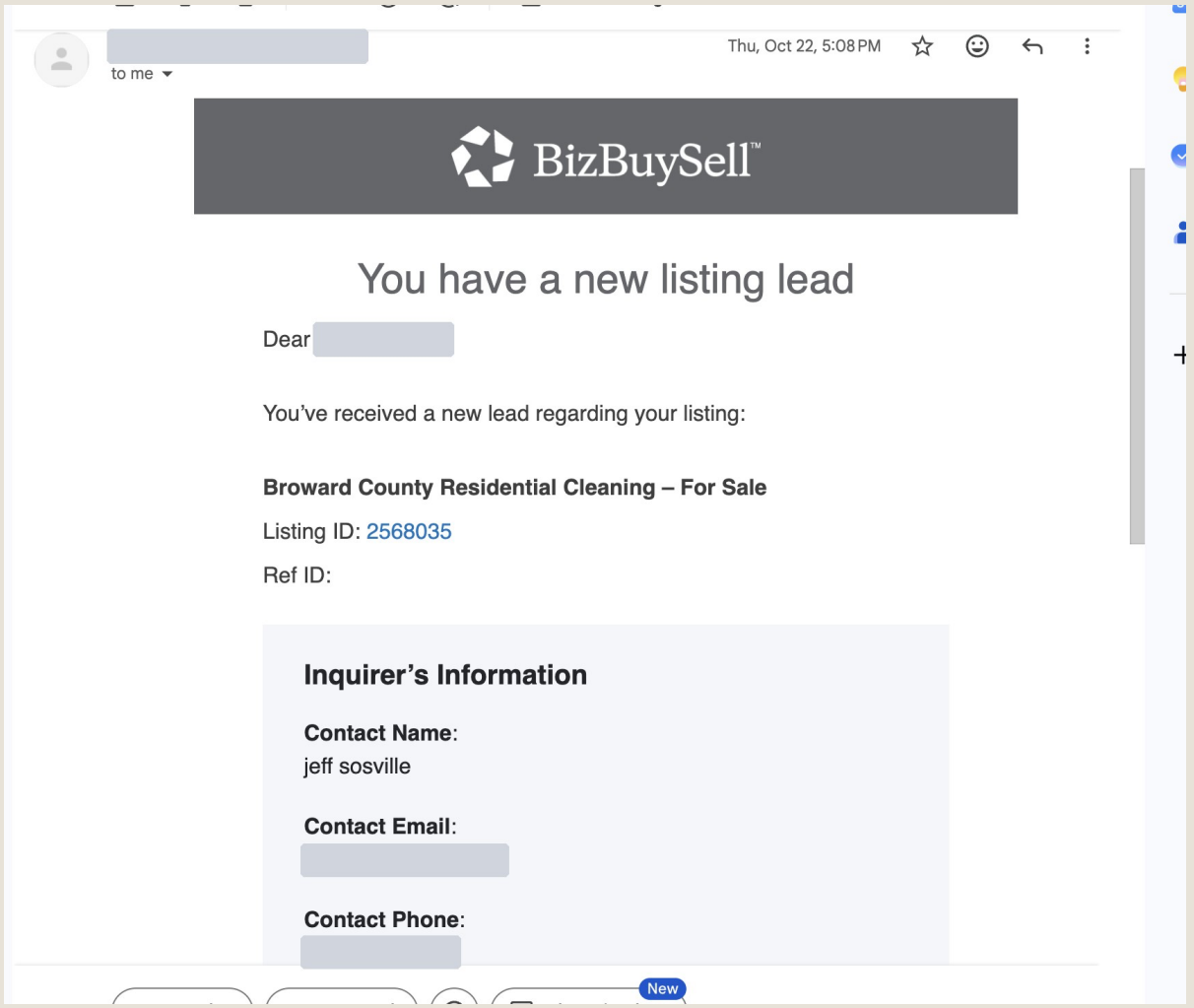
Documents and an AI concierge, with every view logged.

01

A buyer inquires

A lead arrives from BizBuySell. Our routing reads which listing it's for and sends it to that listing's brand inbox, so nobody has to forward anything by hand.

Works with marketplace leads and your own site's forms

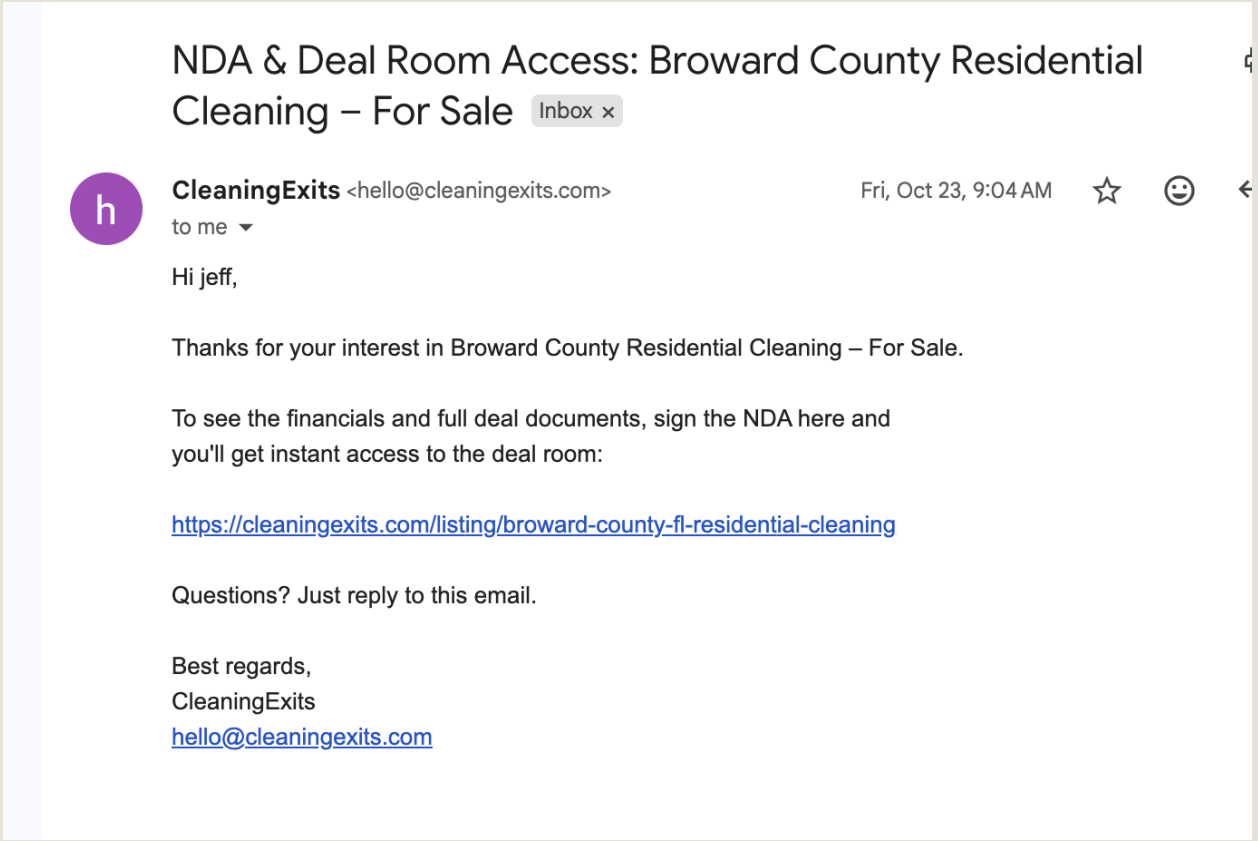


02

The NDA invite goes out

The buyer gets a personal email from the brand's address with one link to sign the NDA. Replies come back to that same inbox.

Sent under your brand, not ours

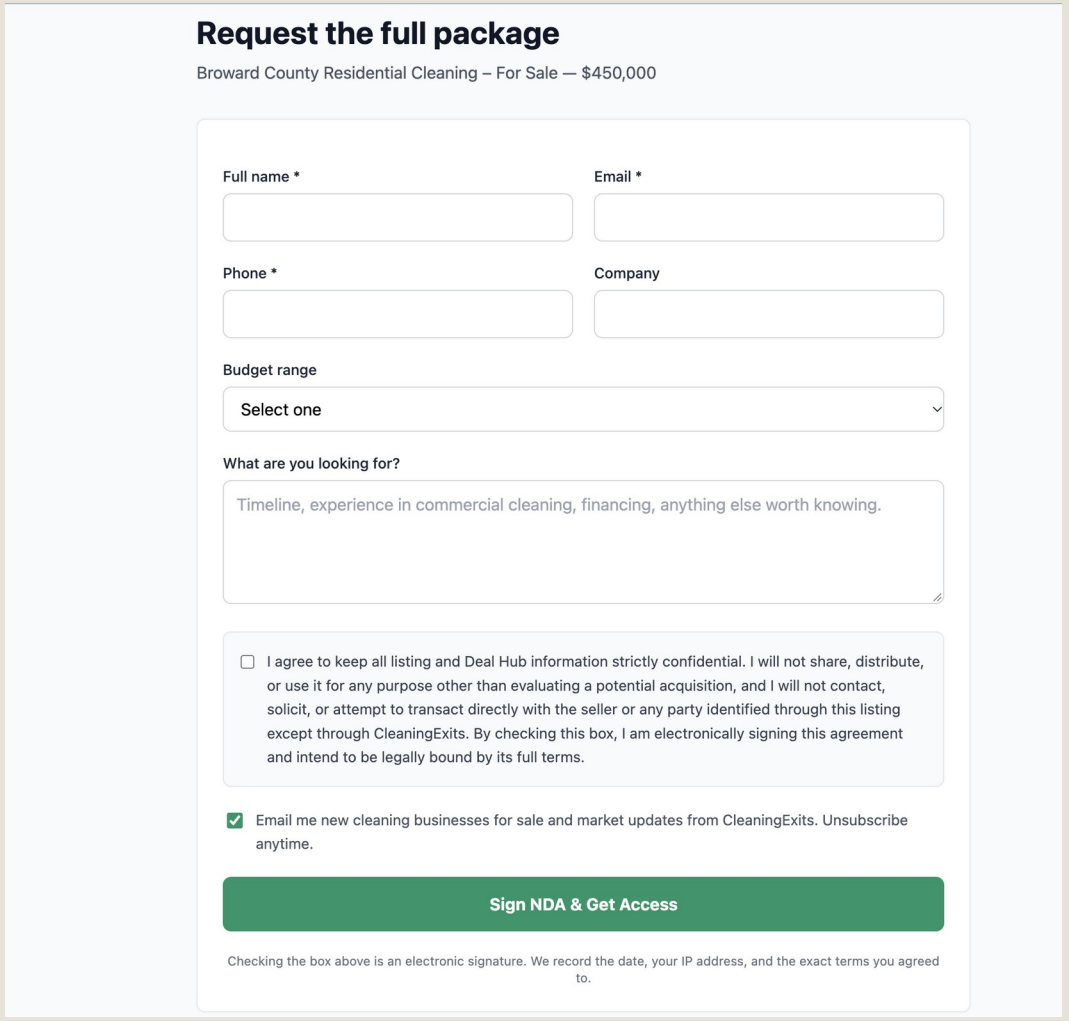


03

The buyer signs the NDA online

One short form on the listing page: contact details, budget and what they're looking for. Checking the box is a binding e-signature, and the date, IP address and exact terms are recorded.

Non-circumvention included; buyers opt in to new listings



04

You get an alert the moment they sign

The moment the NDA is signed, you get an alert with the buyer's contact details, budget and reason for interest, plus a link to their Deal Hub. The buyer is added to the CRM.

Every signed NDA is on record, per listing

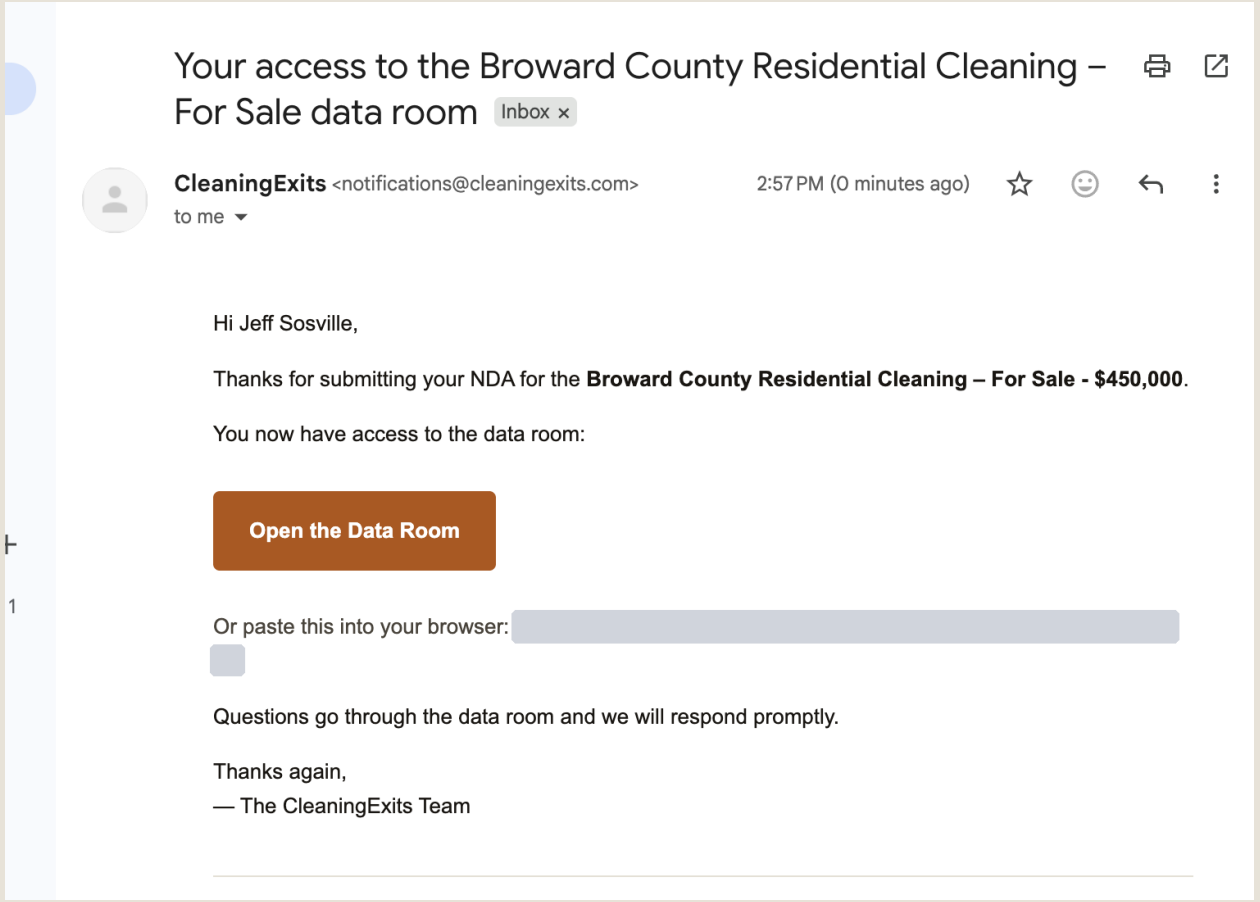


05

The buyer gets data-room access

The buyer receives a confirmation with a private link to the data room for that listing, and can come back to it at any time.

One private link per buyer, per deal

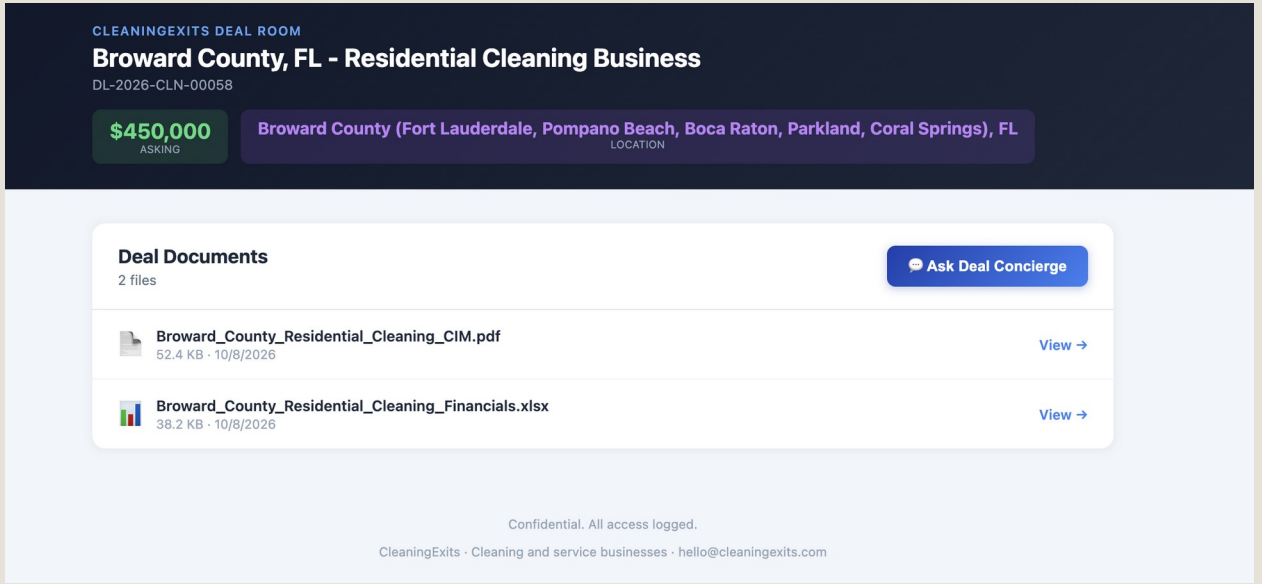


06

The deal room does the first round of answers

The CIM and financials are in one place. The Deal Concierge answers routine buyer questions, and every view is logged, so you know who's serious.

Confidential, and all access logged



WHAT CHANGES

The busywork between a lead and a qualified buyer, handled

Step	The usual way	With our system
Routing leads	Forwarding marketplace emails by hand	Routed to the right brand inbox automatically
Sending NDAs	Attaching a PDF and chasing signatures	Auto-sent link, signed online
Tracking buyers	A spreadsheet that goes out of date	Every buyer and NDA recorded in the CRM
Sharing documents	Emailing financials one buyer at a time	Private data room, with every view logged
First questions	Answering the same questions again and again	Deal Concierge handles the routine ones

NEXT STEP

Put your listings on the same rails

Your brand, your inbox, your listings, running on our lead routing, NDA flow, CRM and deal rooms. [Pricing / call link]