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CASE STUDY · AI OPERATIONS AUDIT

JACKSON HOLE LUXURY HOME REAL ESTATE COMPANY

How a Jackson Hole luxury brokerage found 1,000 to 1,750 hours of admin work hiding between its systems

A boutique luxury home real estate company used an AI Operations Audit to see where its time really goes, then mapped out four quick pilots to win it back without replacing a single system.

1,000–1,750
hours a year of documented admin workload in just two roles

9
AI opportunities across five workstreams

4
quick pilots built to show results in 2 to 8 weeks

0
systems to replace. The plan connects the gaps.

The situation

This brokerage sells on relationships, speed and experienced people. The owner wanted to keep growing without adding administrative work at the same pace, so we interviewed five people across the office, followed up in writing to confirm the numbers, and validated the findings with the owner before writing the final report.

> *"We rely on speed. I want to get it back to people immediately. I want a decision."*
>
> Owner and Broker

CLIENT
Luxury home real estate company, Jackson Hole, Wyoming

BUSINESS
Luxury residential brokerage, about 10 to 15 affiliated people

AUDIT SCOPE
5 interviews, written follow-ups, an owner validation session and a final readout

GOAL
Grow production without adding admin work at the same rate

Before: the systems work, the gaps between them don't

Today

PEOPLE AS THE INTEGRATION LAYER

- Owner and Broker
- Associate Broker (office lead)
- Data and transaction support
- Prospecting broker
- Listings and field broker

16 DISCONNECTED PLACES INFORMATION LIVES

Outlook · Gmail · Salesforce · MLS · Teton County GIS · Dropbox · Google Docs & Sheets · ZipForms · DocuSign · MailChimp · Canva · IDIcore · QuickBooks · Paper calendar · Texts & calls · Memory

Information is created in one tool, moved by hand, re-entered by someone else and often remembered rather than recorded. Experienced people carry the connections in their heads and inboxes.

WHERE THE TIME GOES

- **1–2 hours every morning** updating deed, owner and contact records by hand
- **Every 1–2 days** someone struggles to find a file in Dropbox
- **30–60 minutes** from deal terms to a review-ready contract, about 10 a week
- **70–80 checklist items** per transaction, all checked by hand
- **About 50%** of detailed buyer questions handed back to the owner or office lead
- **3 places** transaction dates are tracked, including a paper calendar

Result: the office lead spends 15 to 25 hours a week on admin, and the business depends on a few people knowing where everything is.

> *"I would have them all integrated, so I only needed to do a task once and then have it all at my fingertips when I needed it there."*
>
> Associate Broker and office lead

Hours are documented workload from interviews and written follow-ups, annualized at 50 working weeks. They are not projected AI savings.

After: capture once, connect everywhere

Target operating model

AI KNOWLEDGE AND INTEGRATION LAYER

Search & Q&A	Extraction	Linking	Routing	Exceptions
Ask for any file, property fact or deal	Pull terms from contracts, email and county records	Tie everything to the right property and client	Send tasks and deadlines to the right person	Flag what needs a human, not everything

ONE SOURCE OF TRUTH: Property › Client › Transaction › Document › Task & deadline

EXISTING SYSTEMS STAY IN PLACE, NOW CONNECTED: Outlook, Gmail, Salesforce, MLS, Teton County GIS, Dropbox, Google Docs & Sheets, ZipForms, DocuSign, MailChimp, Canva, IDIcore, QuickBooks

- ✓ **Find it by asking** instead of hunting through folders
- ✓ **Deal terms captured once** and checked before the contract
- ✓ **Owner data kept current**, with people reviewing only exceptions
- ✓ **Fewer handoffs** to the owner and office lead
- ✓ **Actions and deadlines** surfaced from email automatically
- ✓ **Broker judgment and client privacy** built into the design

Goal: move hours from administration, data upkeep and file hunting back to clients, prospecting and closing deals.

PILOT 1 · WEEKS 2–8

Contract intake

BEFORE

Owner gives terms by call or text › Office lead re-keys them › Revisions back and forth › Review-ready

AFTER

Owner dictates 6–7 deal terms › AI fills a structured intake › Office lead verifies › ZipForms & DocuSign

TIME AT STAKE

150–600 hrs/yr

3–12 hours a week of contract work, 30–60 minutes per contract to review-ready

THE PILOT MEASURES

Time to review-ready, contract hours and correction rate. AI drafts and checks, licensed people approve.

"If I could write in the details of an offer and my software could write it for me, and then I could just go through and check it, that would be big." Associate Broker and office lead

NEXT · PROTOTYPE IN MONTHS 1–3

Ownership and prospecting data

BEFORE

County deed › Owner and LLC resolved by hand › 6–8 possible phone numbers, ~70% accurate › Checked by hand › Salesforce

AFTER

County change detected › Owner and entity resolved › Contacts enriched and scored › People review exceptions › Prospecting queue

TIME AT STAKE

250–500 hrs/yr

1–2 hours every morning, up to 10–20 deed changes a day in busy season

WHY IT MATTERS

It takes about 60 conversations to set one listing appointment, so better contact data means more selling time.

Results in weeks, not months

WEEKS 1–2	WEEKS 2–8	DAYS 60–90
Set the foundation	**Run four pilots**	**Measure and scale**
Privacy and data rules, folder standards and pilot baselines	Narrow, low-risk workflows on the tools the team already uses	Compare to baselines, then expand only what the numbers support

PILOT	BASELINE TODAY	HOW IT'S MEASURED
1. Structured contract intake	30–60 min to review-ready, ~10 contracts a week	Time to review-ready, correction rate
2. Dropbox and property search	File-finding friction every 1–2 days	Time to find, how often someone else has to
3. Verified property record	~50% of buyer questions handed off	Handoff rate, listing-folder completeness
4. Inbox and action triage	~40 actionable emails a day for one broker	Triage time, missed or late actions

Are your best people the integration layer?

Let's talk about an AI Operations Audit for your brokerage. **Chris Wollerman** · chris@inspireaiconsulting.ai · inspireaiconsulting.ai