THE IVY GROUP
Commercial Properties, Above & Beyond

CCIM NORTHERN CALIFORNIA · AI TRAINING SUMMIT

Broker AI Tools

How a working broker built his own deal operating system

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How are you tracking your deal flow today?

- Spreadsheets
- Email threads
- Sticky notes
- A CRM built for someone else

Critical dates slip. Commission splits live in someone's head. Referral credit gets lost. And the one deal that needs you today is buried under the fifty that do not.

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The Ivy Transaction Manager

Built by describing outcomes to Claude AI. Zero developer, no code, over 10,000 lines of code.



Attention view

Triage what needs action today across every open deal.

Action buttons

Each checklist step launches the AI skill that does the work.

Commissions

Open and closed pipeline, splits, referrals and expenses.

Portfolio totals

Dollar volume, building SF and lot SF across the book.

Live demo · sanitized sample data

Three skills you can take home

A skill is a saved set of instructions that turns a repeated task into one request.

Property Valuation

Input: sale comps, property profile, rent roll

Output: comps approach, income approach and a reconciled value

Lease Comps

Input: a lease comp report and the subject property

Output: a formatted comps table and a market-rent recommendation

Offer Summary

Input: every purchase offer or LOI received

Output: a side-by-side offer matrix for the client

Shared as generalized versions · your template, your data, your review

Guardrails, then Monday morning

My guardrails

Client financials never go into a public tool.

Every number is checked against its source.

I know where my data lives.

Start Monday

1. Pick one task you repeat every week.
2. Describe the outcome and the rules.
3. Save it as a skill and refine it.

Summit AI Toolkit



ccim.oelement.ai/toolkit

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