

REAL ESTATE

# Tech Buyer's Guide

Five Considerations Beyond the Product

BROUGHT TO YOU BY





## INTRODUCTION

Selecting the right tech vendor has long-term effects on your business—from boosting productivity to driving growth. Poor choices can quickly result in an onboarding nightmare, poor adoption, hidden costs that impact profitability, or poor agent satisfaction and client experience.

This guide serves as a roadmap for real estate brokerages when evaluating technology vendors. We'll highlight five essential considerations beyond product features to help you make informed choices about the companies you partner with to deliver technology solutions to your agents.



Watch industry experts **Stephanie Hrutkay** of Corcoran McEneaney, **Tom Flanagan** of The Group, Inc, and **Matthew Ferrara**, Speaker & Author discuss what to consider beyond the product.

[WATCH HERE](#)

ONE

# Industry Expertise, Reputation, and Stability



“We all know how frustrating it is for our agents and our staff to switch technology. So we do our due diligence, and we will interview every platform that fits that need before we make that decision.”

— STEPHANIE HRUTKAY

[FIVE QUESTIONS TO ASK BEFORE BUYING REAL ESTATE TECH WEBINAR](#)

When selecting a technology partner, reliability and expertise are non-negotiable. A vendor that deeply understands real estate’s unique demands, has a proven track record, and shows long-term stability, can deliver more effective solutions through its unique understanding of the industry’s challenges and opportunities.



HERE'S WHAT TO LOOK FOR:

## Real Estate Expertise

Seek a vendor with a strong focus on real estate and deep roots in the industry. This ensures that the solutions are designed to meet the distinct needs of brokerages and agents. Vendors with real estate expertise bring tools tailored to industry workflows, such as CRM integration with MLS data, transaction management abilities or integrations, buyer and seller presentations, and automated client follow-ups. These specialized features reduce manual tasks and help agents provide a seamless client experience, ultimately improving productivity and strengthening client relationships. A vendor that focuses on real estate will also be more in tune with industry trends and challenges, providing brokerages with a competitive edge.

Real estate technology should also comply with all applicable regulations, including data privacy laws (such as GDPR or CCPA), as well as local industry requirements for disclosures in marketing. A vendor that understands and incorporates these standards into its platform reduces the risk of legal issues and ensures the brokerage maintains its reputation and trustworthiness.

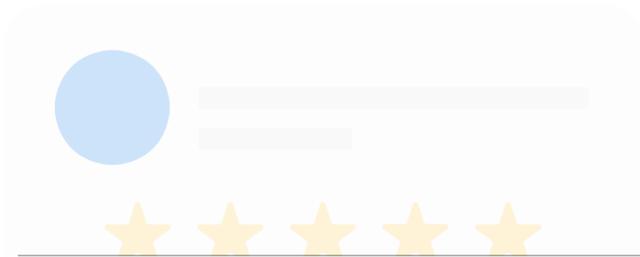
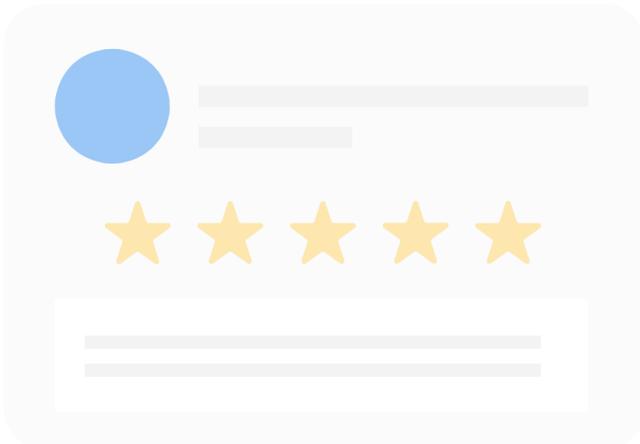
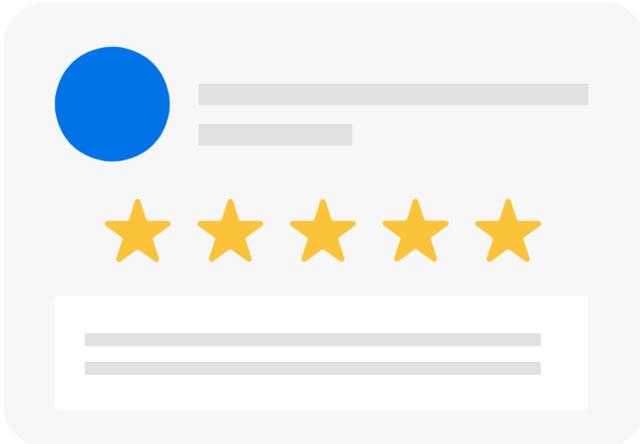
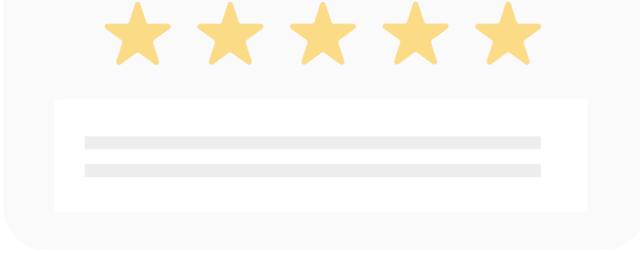
Additionally, prioritize vendors with robust security protocols, such as encryption, secure cloud storage, and regular updates. These measures safeguard sensitive client information and protect brokerages from costly data breaches or compliance risks.



“90% of the time, we end up going with a company that was referred to us.”

— STEPHANIE HRUTKAY

[FIVE QUESTIONS TO ASK BEFORE BUYING REAL ESTATE TECH WEBINAR](#)



### Proven Reputation

A vendor's track record with other brokerages offers insight into its reliability and effectiveness. Success stories and partnerships with respected brokerages highlight the vendor's ability to address challenges and deliver results. Testimonials, case studies, and references from similar-sized brokerages demonstrate how the technology has been successfully implemented and build confidence that the solution will perform well for your brokerage. Established partnerships with complimentary tech companies also indicate that the vendor is committed to supporting and evolving with its clients, an essential factor for brokerages seeking a lasting technology partnership.

### Stability and Longevity

Choosing a vendor with stability and a commitment to the industry helps brokerages mitigate risks associated with frequent business changes. Consider asking about a vendor's financial backing and ownership when assessing it as a long-term partner. Additionally, vendors with a strong product roadmap and history of product growth show that they're here to stay. A stable vendor not only provides confidence in its longevity but also ensures that brokerages have a dependable partner invested in their growth and success.



### INSIGHTS

**What have been the defining qualities in the tech vendors you've had the most success working with?**

"If it's not intuitive, then there's no chance it's going to be adopted... and knowing where that company is going also. We're working with that company, or platform, to grow with them. And so that synergy of working together... That's really important because even if a platform can't do exactly what you want right away, but you know that they're going to dedicate the time and resources to get you there".

**STEPHANIE HRUTKAY**  
Director of Digital Resources  
Concoran McEearney

TWO

# Onboarding, Training and Support



“Onboarding is a process. Understanding and delivering to the agents how the system works, but also how it integrates with all of your other operational elements. Good training that actually works for people matters, and support that is there in the way in which people wish to access it”

— MATTHEW FERARRA

[FIVE QUESTIONS TO ASK BEFORE BUYING REAL ESTATE TECH WEBINAR](#)

Great features mean little if your agents struggle to use them. A vendor’s onboarding and training programs directly impact how quickly and effectively your team adopts technology, while responsive support ensures that any frustrations aren’t left to ferment. Selecting a vendor who prioritizes ongoing client success keeps your brokerage competitive in the long run.



HERE'S WHAT TO LOOK FOR:

### Comprehensive Onboarding

Effective onboarding is essential for maximizing the value of any real estate technology. Vendors who offer a structured and comprehensive onboarding—including live training, self-guided tutorials, and easy-to-access help centers—equip agents and staff to quickly become proficient with the new system. Look for vendors that include step-by-step guidance, personalized support, and resources tailored to your brokerage's needs.

### Ongoing Training and Resources

Robust training minimizes frustration and boosts confidence in the platform. A continuous learning approach not only strengthens agents' skills but also enhances their confidence in using the platform, leading to greater productivity and client satisfaction. Brokerages benefit from a tech partner invested in their growth and performance, making the platform a sustainable tool for long-term success. Look for a vendor that provides webinars, tutorials, and a knowledge base to ensure agents stay informed on new features and best practices.



MoxiWorks offers detailed onboarding programs, live training webinars, and a help center filled with tutorials and resources. These training tools ensure that agents and brokerages maximize the platform's value, empowering users to navigate the tools effectively from day one.





## Responsive Support

Timely and knowledgeable customer support is critical when issues arise. Vendors with scalable support resources can address your team's needs quickly, reducing interruptions and providing resolutions quickly and seamlessly. Choose a vendor equipped to grow with your team, offering tailored support and updates as your brokerage evolves.

**95%**

**For example,** the MoxiWorks support team maintains a support satisfaction rate of 95%.

Selecting a vendor that provides thorough onboarding, robust customer support, and readily available resources can minimize hidden costs that come with prolonged agent training or frequent software troubleshooting, helping brokerages achieve quicker time to value for their toolset.



## INSIGHTS

**How do you evaluate a company's plans and resources to get agents using the product, and support your company's efforts to drive consistent usage?**

"A dedicated account manager is an absolute must for us...and a thorough knowledge center is a must.

You get one chance to make a first impression with your agents, and we know how the real estate year is cyclical. So planning out that timing, but then having a partner that will help you through that also on the other side and dedicate that time. I always make it very clear beforehand what our expectations are so nobody's surprised."

**STEPHANIE HRUTKAY**

Director of Digital Resources  
Concoran McEneaney

## THREE

# Innovation and Future-Proofing

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“My team and I got the opportunity to meet [the CEO of MoxiWorks], Eric, and he laid out what the next 15 months of MoxiWorks looks like. And to have that open conversation, that just was really important, because any hesitations or anything we were unsure about, it got squashed, and we are a very happy customer of many MoxiWorks products.”

— STEPHANIE HRUTKAY

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The real estate industry evolves rapidly, and your technology should keep pace. A vendor’s commitment to innovation ensures its platform remains relevant and continues to deliver value.



HERE'S WHAT TO LOOK FOR:

### Commitment to Innovation

A vendor's commitment to innovation is a sign that their platform will evolve alongside industry needs, providing brokerages with long term value. Ask vendors about their history of product updates and feature rollouts. This will give you a sense of their ability to adapt and respond to industry trends.

### Emerging Technology Integration

Vendors incorporating AI, predictive analytics, and automation are positioned to help you stay ahead of competitors. These advancements can improve workflows, enhance client experiences, and provide data-driven insights. The key here is to be critical in assessing which features are truly valuable and which are just shiny objects.

### Product Roadmap

A vendor with a thoughtful, robust product roadmap and focus on innovation can be a signal that brokerages can trust that the technology will adapt to meet future challenges and opportunities.



### INSIGHTS

**Where does future proofing and innovation fall into your ability to evaluate whether you have the right partner or not before you enter into a relationship?**

“Vendors, creators and partners [are often] alluding to products and services that are not yet ready for prime time. They're boasting, they're pitching, they're selling to you, but may never see the light of day. That's equally detrimental.

And so I look at both ends of the spectrum as we have to walk down the middle of that line.

If you're exploring working with a partner or a product or service or a company in this industry, working with a company that's going to be transparent in their development team, their engineering staff, their designers, the longevity of how long those talented creative professionals have been at the organization, and the roadmap...a company that's willing to share that, to share their vision, to reinvest back into that company. And if you find a vendor who's going to be transparent and share that information with you, that seems like a good fit to me.

**TOM FLANAGAN**  
Chief Innovation Officer  
The Group, Inc.

## FOUR

# Alignment with Sales and Training Methodology



“It is quite often that we hear people try to adopt a technology, but the way the technology works doesn’t align with the way the brokerage works, with the kind of work it wants to do, the level of high touch service it wants to deliver...the flow of how agents want to go about their day and building their, careers”

— MATTHEW FERARRA

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A technology platform should align with how your brokerage approaches relationships, sales, and training. Misaligned tools can hinder workflows, while the right fit enhances your operations.



HERE'S WHAT TO LOOK FOR:

### Sales Methodology

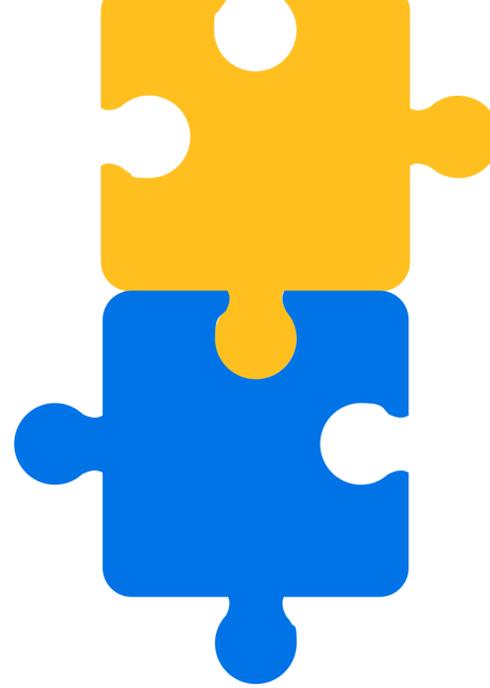
The technology that supports your agents should tightly align with the sales methodology your brokerage subscribes to. For example, if your brokerage leverages the Ninja or sphere selling methodology, the technology agents use to market and sell should be complimentary to that method, supporting their success.

### Training Philosophy

Look for vendors whose tools reflect your brokerage's values, such as relationship-building or data-driven decision-making. Like assessing alignment with your sales methodology, you should assess how technology tools will support how you already train your agents. It should complement your methods, not force unnecessary changes.

### Integration

Selecting technology that integrates smoothly with essential tools and data feeds, such as your MLS or CRM, is fundamental for a high-functioning brokerage. Real estate technology with robust MLS integration ensures that listing data is accurate and updated in real-time, allowing agents to access the latest information without manually managing it. This will create further alignment across your brokerage.



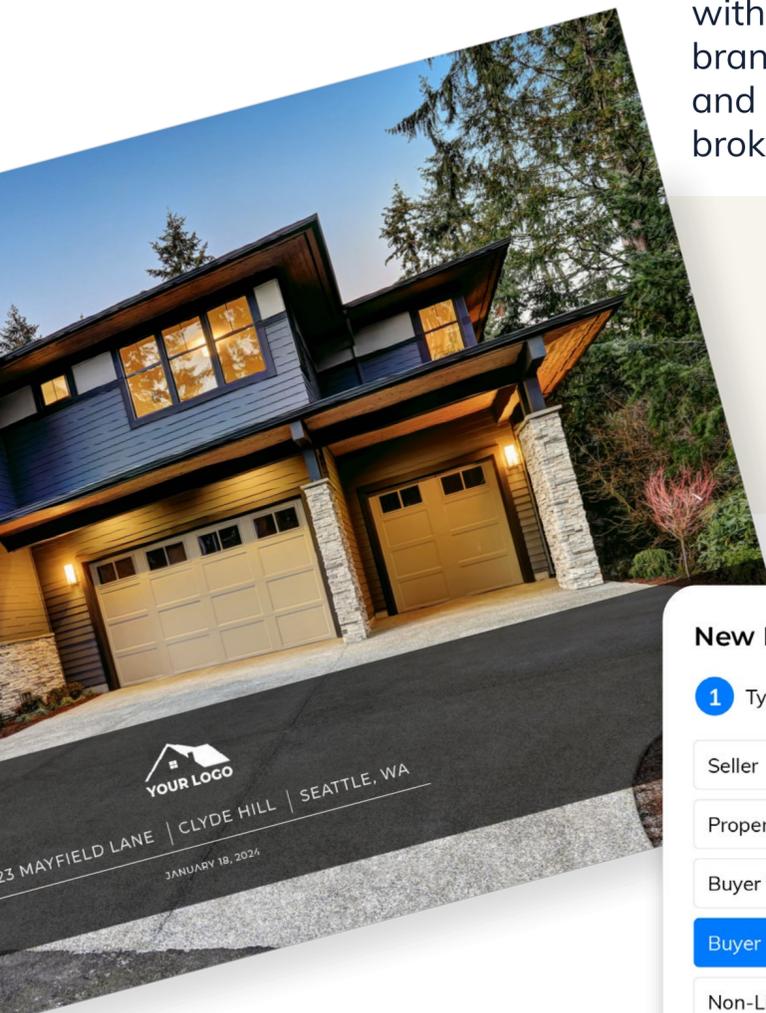
### INSIGHTS

**How important is it to understand how a technology vendor will align with your company's value proposition, training, and sales methodology?**

"In terms of working with a tech vendor in the real estate space, we have really deep integrations between the marketing and technology team in that vendor...Choosing the right cultural fit for your team and your department and your organization might be more important than the actual tech itself.

It's really a relationship. It's not a vendor. It's a partner."

**TOM FLANAGAN**  
Chief Innovation Officer  
The Group, Inc.



## Customizability

For real estate technology to truly benefit a brokerage, it must align with both the functional needs of its agents and the brokerage’s brand identity. Ensure the platform supports your unique workflows and branding. Flexible tools adapt to your processes, reinforce your brokerage’s identity, and enable brand consistency across channels.



MoxiWorks tools like **MoxiPresent** allow brokerages to offer agents a library of easily customizable templates for CMAs, buyer tours, and listing presentations, helping agents seamlessly promote their brokerage’s brand identity and make a lasting impression on clients.

**New Presentation**

1 Type   2 Template   3 Publish

Seller

Property Review

Buyer Tour

**Buyer** ✓

Non-Listing



## INSIGHTS

Brokerages often look for the “perfect match” and focus on tiny customizations that prevent them from making a decision or applying technology to the big opportunities to drive sales, efficiencies and customer experience. How do you balance those needs when choosing a vendor?

“We had this mindset that everything had to be highly customized and white labeled in order to compete with some of these other brokerages that claim their tech is the best...And when we started going down that rabbit hole, we were asking a lot of our tech partners and they were over customizing things, and then things stopped working.

So we had to kind of pull back because they just need to work. The tools need to work because you can’t go through the process and the investment of new platforms if it’s not reliable.

You get a very short window to onboard your agents for them to click, and then you want it to be easy from that point on. So just keep that in mind... don’t get caught up in competition, you just want solid partners and platforms that work.

**STEPHANIE HRUTKAY**  
Director of Digital Resources  
Concoran McEearney

FIVE

# Return on Investment (ROI)

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“It’s very easy to get excited about the product, but it’s about the results of the product that we care, more than ever”

— MATTHEW FERARRA

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Every investment in technology should demonstrate measurable value. A vendor’s ability to support your profitability is one of the most critical considerations.



HERE'S WHAT TO LOOK FOR:

## Evaluating the Total Cost of Ownership

When purchasing new technology, it's essential for brokerages to look beyond the initial price tag and consider the **total cost of ownership** (TCO). While upfront expenses are clear, hidden costs such as ongoing maintenance, training, and integration costs can add up quickly, impacting the platform's long-term value and your ability to support it.

Here are a few things to consider when assessing a product's total cost of ownership:

- **Integrations and data feeds:** ask the vendor for clarity on any fees associated with integrations or data feeds to avoid surprise invoices.
- **Version control:** ask vendors if they charge for feature upgrades. Some of these will be expected if the product is tiered, but you want to avoid unexpected charges for ongoing product refinement and improvements.
- **Support:** be sure to ask vendors if they charge for agent support or if it's included in the sticker price.
- **Administrative and other soft costs:** consider the time required by your team to support the technology. Some of this will be time well spent, such as effort driving training and adoption. But time spent on maintenance or support should be minimal.



## Long-Term Savings and Operational Efficiency

Streamlined workflows translate directly to ROI through time saved. Technology should drive long-term savings by improving efficiency, reducing administrative work, and minimizing manual data entry. An all-in-one platform that centralizes core functions reduces the need for multiple subscriptions, which not only lowers costs but allows agents to work faster, focus on client relationships, and achieve better overall performance.

## Transparent, Flexible and Scalable Pricing Models

Ensure the pricing structure supports growth without hidden costs, allowing your brokerage to expand without financial strain. Choosing a tech vendor with a clear pricing structure is fundamental to controlling TCO. Some vendors offer per-agent pricing or tiered packages, which allow brokerages to scale as they grow without incurring hidden fees. Transparent pricing that covers all elements—such as implementation, training, and ongoing support—enables brokerages to budget accurately and avoid surprises down the line. This type of pricing flexibility can be especially valuable for brokerages with growth ambitions, as it allows them to expand their technology use affordably.



### INSIGHTS

**How do you evaluate whether a technology will deliver a good return for you?**

“It comes down to the difference between an expense and an investment, and those are two different things.”

**TOM FLANAGAN**  
Chief Innovation Officer  
The Group, Inc.

## CHECKLIST

# Choosing the Right Real Estate Technology Vendor

Selecting a technology vendor is a major investment, and choosing the right one can set a brokerage up for lasting success. Here's a checklist that provides a quick-reference guide to the essential factors brokerages should consider when evaluating potential tech partners, covering aspects like industry focus, onboarding and training, support, alignment, and long-term value.

### 1. Industry Expertise, Reputation, and Stability

- Does the vendor specialize in real estate technology with a deep understanding of industry workflows?
- Are there success stories, testimonials, or strong partnerships with brokerages similar to yours?
- Is the vendor financially stable, with strong ownership and management?
- Does the vendor comply with regulations like data privacy (e.g., GDPR, CCPA) and fair housing standards?
- Does the platform integrate seamlessly with core tools and data feeds like MLS, CRM, and transaction management systems?
- Are security measures, such as encryption, regular security updates, and multi-factor authentication, in place to protect sensitive data?
- Does the vendor maintain transparency about their security practices and compliance updates?

### 2. Onboarding, Training, and Support

- Does the vendor provide structured onboarding programs tailored to your brokerage's needs?
- Are there robust training resources, such as webinars, tutorials, and a help center, for ongoing education?
- Is responsive customer support available to address issues quickly and effectively?

### 3. Innovation and Future-Proofing

- Does the vendor demonstrate a commitment to innovation through regular product updates and feature enhancements?
- Are emerging technologies, such as AI and predictive analytics, integrated into the platform in a meaningful way?

### 4. Alignment with Sales & Training Methodology

- Does the vendor's product align with your brokerage's approach to relationship-building, sales, and training?
- Are the tools customizable to fit your workflows and branding requirements?
- Is the platform user-friendly and designed to encourage agent adoption with minimal training?

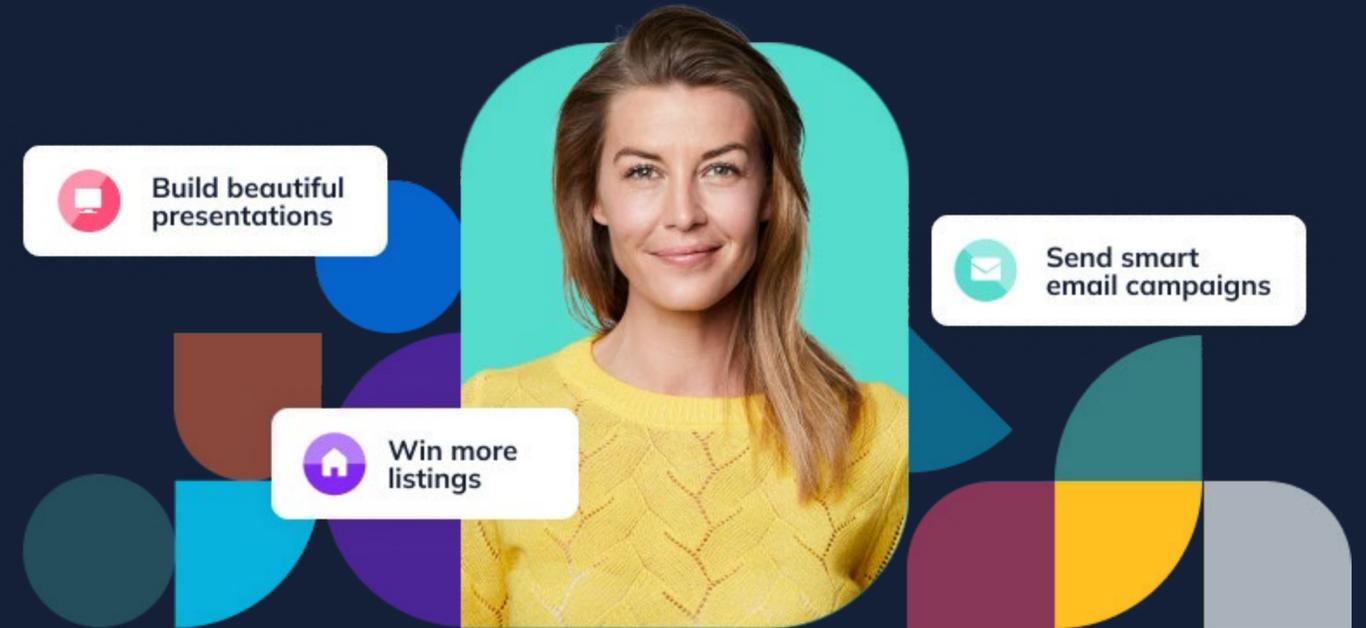
### 5. Return on Investment (ROI)

- Does the vendor offer case studies or data showing measurable ROI for brokerages like yours?
- Does the platform streamline workflows, reduce administrative tasks, and improve agent productivity?
- Are pricing models transparent, flexible, and scalable to accommodate your growth?

## CONCLUSION

# Making the Right Choice for Long-Term Success

Selecting the right technology partner is a pivotal decision that influences a brokerage's efficiency, client experience, and growth potential. The right vendor doesn't just provide tools; they become a strategic partner dedicated to your brokerage's goals, adapting as needs evolve and the market changes. With careful consideration of key factors beyond the product itself and a focus on value, brokerages can confidently choose a technology partner that empowers agents, builds client trust, and supports growth for years to come.



## Ready to make the right tech choice for your brokerage?

Connect with us to explore solutions that support your goals and empower your agents. Our team is here to answer your questions, provide personalized demos, and guide you toward a technology partner that will grow with you.

**Talk to a MoxiWorks expert today →**