

REAL ESTATE

Real Estate IT Tools Checklist

Mobile agents, secure transactions, and closings that do not get hijacked.

Real estate is mobile, fast, and full of money in motion. Wire fraud in closings is one of the most common and expensive scams in the country. This checklist covers the tools that keep agents productive and transactions safe.

How to use it: tick what you have in place today. Anything left unticked is a conversation worth having.

01 Work from anywhere

- ☐ **Managed laptops and phones for agents and staff**
Lost devices get wiped, not reported.
- ☐ **CRM and transaction management integrated with email**
One record for every client and deal.
- ☐ **E-signature and secure document sharing**
No sensitive documents over unencrypted email.
- ☐ **Business phone system that follows agents**
Calls ring wherever the agent is.
- ☐ **Reliable office network with separate guest Wi-Fi**
Open houses and walk-ins stay off the office network.

02 Protect transactions

- ☐ **Wire instructions confirmed by phone at a known number, every time**
Closing wire fraud starts with a hacked email account.
- ☐ **Multi-factor authentication on email, CRM, and transaction platforms**
Agent email accounts are the target.
- ☐ **Email filtering for impersonation and lookalike domains**
Fake title company emails look real.
- ☐ **Client communication that warns about wire fraud early**
Tell buyers you will never change wire instructions by email.
- ☐ **Endpoint protection monitored 24/7**
On every agent device that touches deals.

03 Grow the brokerage

- ☐ **Onboarding and offboarding for agents who join and leave**
Departing agents lose access to client data the same day.
- ☐ **Clear ownership of client data and listings**
Know what stays with the brokerage.
- ☐ **Backups of CRM and transaction files**
Records retention applies.
- ☐ **Outage plan for office systems and closings**
Cloud tools keep deals moving when the office is closed.
- ☐ **Quarterly review of software subscriptions**
Agents collect tools. Consolidate them.

Red flags we see most

- Wire instructions are sent or changed by email.
- Agents use personal email for client business.
- Departed agents still have CRM access.
- There is no multi-factor authentication on agent email.

Where to start

Make phone verification of wire instructions a written brokerage policy and tell every client about it at the first meeting.

Want a second set of eyes?

Book a free 30-minute technical assessment. A senior engineer walks through this checklist with you and tells you what to fix first. No sales script, no obligation.

Book a technical assessment

(617) 322-5155

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