

Executive summary | June 2025

Wipfli Real Estate Leaders Exchange

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Subject Matter Specialist: Danielle Johnson | CRE Digital Strategist | Wipfli

Facilitator: Austin Evans | Profitable Ideas Exchange



Introduction

The Q2 Wipfli Real Estate Leaders Exchange convened virtually, bringing together CFOs and financial leaders from across the real estate industry.

The conversation centered on how today's uncertain market conditions are driving CFOs and executives to focus inward on streamlining operations, evaluating technology and preparing for future growth. The session was hosted by Cory Bultinck of Wipfli and facilitated by Austin Evans of Profitable Ideas Exchange, with Danielle Johnson of Wipfli providing insights on technology evaluation, adoption and scalable training.



Market conditions are putting the focus on efficiency

Participants agreed that the current economic environment — marked by a slower deal pipeline and cautious capital deployment — is prompting a shift in focus toward internal optimization.

“In this sort of dodgy market, we’re really focused inwards on operational efficiencies.”





Organizations are using this time to reassess growth strategies, strengthen internal systems and outsource strategically. Several firms have scaled back aggressive hiring and market expansion plans to favor leaner, more deliberate growth.

From migrating HRIS platforms to automating AP processes, leaders are prioritizing foundational improvements. Many are leveraging offshore teams to reduce costs and increase scalability, particularly in accounting and administrative functions.

One executive described how their team had initially budgeted for a significant headcount increase to support expansion into new markets, only to revise that plan in response to shifting macroeconomic signals. “What we initially started as having a pretty rapid growth plan by expanding into new markets — we’ve actually scaled that back quite a bit,” they shared.

This recalibration reflects a broader trend among participants: a preference for operational resilience over aggressive expansion, with a focus on building scalable infrastructure that can support future growth when the market rebounds.

Framework for technology evaluation

As the conversation shifted from operational efficiency to the tools enabling it, participants began to share the challenges they faced in evaluating and selecting new technologies. With a flood of vendor outreach and internal requests to pilot new platforms, many leaders expressed frustration over how to separate signal from noise.

One executive noted that their team receives dozens of pitches each month, often without a clear understanding of the business problem the tool is meant to solve. This opened the door for Danielle Johnson to share a structured approach that has helped organizations cut through the clutter and make smarter, more strategic technology decisions.



Johnson introduced a simple, actionable framework for evaluating new technology that resonated with participants navigating a crowded vendor landscape. The framework emphasizes identifying the business problem, assessing fit and readiness, piloting and learning fast, and measuring ROI.

“Identify the problem you’re trying to solve. Have a simple way to evaluate and compare tech platforms.”

One participant shared how their team uses a structured intake form to vet new tools, while another described a “Shark Tank”-style pitch process to encourage cross-functional innovation.



Successful adoption: From curiosity to action

While curiosity around AI and automation is high, participants emphasized the importance of aligning tools with real business needs and not just adopting technology for its own sake.

As Johnson noted, the most successful implementations start with a clear use case and a champion within the business. Examples included:

- AI-generated investor communications and marketing materials.
- Invoice automation to reduce manual data entry.
- NotebookLM for document summarization and contract comparison.
- Yardi's embedded AI tools for AP and leasing workflows.

Still, caution remains. One executive shared a cautionary tale:

“Someone loaded their earnings report [into ChatGPT] as they were refining it... their competitor had access to their earnings data prior to their earnings call.”

This underscored the need for governance and secure enterprise tools.

Others shared that they are intentionally delaying broad AI rollouts until more clarity emerges around security, ROI and integration with existing platforms. The group agreed that the key to successful adoption lies in structured ideation: starting with the business problem, identifying the right tool and piloting with a small team before scaling.

*“It’s not about AI for AI’s sake.
It’s about solving a business
problem.”*

This shift in mindset from chasing innovation to driving outcomes was echoed throughout the conversation.



Scalable training tools to drive adoption

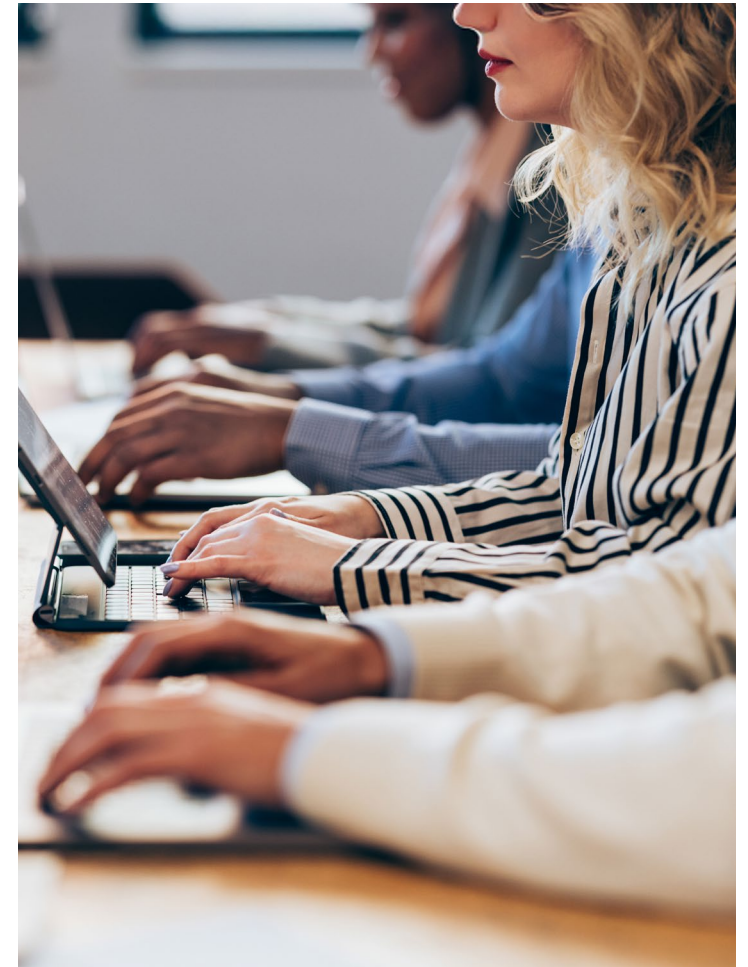
Adoption challenges were a recurring theme. As one executive shared,

“We’re having difficulty with certain team members who are working so hard but yet not adapting to new tools and initiatives.”

This sentiment resonated across the group, highlighting a common tension: how to bring teams along when the pace of change outstrips their capacity to absorb it.

To address this, Johnson spotlighted several scalable training solutions that organizations can implement with minimal overhead. Chief among them was WalkMe, an in-app guidance tool that embeds directly into platforms like Yardi, Salesforce and Entrada.

WalkMe enables real-time, step-by-step walkthroughs, reducing support tickets and improving compliance. Johnson shared that one client saw a 60% reduction in errors within six months of implementation with just one part-time resource managing the tool.



Other tools mentioned included Scribe, a lightweight platform for creating visual standard operating procedures and process documentation, and Yardi's train-the-trainer model, which several participants use to cascade knowledge internally. These tools help bridge the gap between implementation and adoption to help ensure that teams not only have access to new systems but are equipped to use them effectively.

One executive noted that their organization is currently relying on video tutorials and internal champions to support adoption but acknowledged the need to expand their toolkit.

Johnson emphasized that scalable training doesn't have to be expensive or complex. The key is to meet users where they are by embedding support directly into the tools they use every day rather than relying on static documentation or one-off training sessions. These tools help bridge the gap between implementation and adoption so that teams not only have access to new systems but are also equipped to use them effectively.



Balancing innovation with intention

The session closed with a shared recognition that while the market may be slow, the opportunity to build operational strength is significant. Leaders are using this time to reassess growth strategies, streamline internal operations, evaluate and adopt technology with intention and train teams for long-term success.

“My controller manually enters every invoice into our system, and she’s overwhelmed. I won’t hire additional help because it’s not justifiable. There are tools available.”



The message was clear: Now is the time to invest in efficiency. Firms want to go beyond weathering the current market to emerge stronger and more scalable when the cycle turns.

Several participants reflected on the importance of balancing innovation with intentionality. While AI and automation offer exciting possibilities, the group emphasized that the real value lies in freeing up teams to focus on high-impact work.



“If you automate the personal touch, then you’re not needed. To create value, it has to be personal.”



This sentiment echoed throughout the discussion: Technology should enhance, not replace, the human relationships that drive real estate. Whether it's investor communications, broker relationships or internal collaboration, participants agreed that the most successful organizations use technology to amplify their people, not sideline them.

The session closed with a reminder that leadership plays a critical role in this transformation. From setting the vision to modeling adoption and investing in training, leaders must guide their teams through change with clarity and empathy.

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