



BEYOND THE CRM

INTRODUCING DEAL STUDIO

Are your current systems keeping you from *greater potential?*

We're not here to talk about a CRM. We're here to talk about the business strategy and growth strategy behind brokers who are ready to raise the quality of every interaction, from first contact to close.

DEAL-STUDIO.COM

PROTECTING AND PROMOTING THE VALUE OF BUSINESS BROKERS

To *protect and promote* the value of the business broker. Giving them the systems, strategy, and support to raise the quality of every interaction, from the *first point of contact* to the close of every deal.

Who's on *the call*.



Ron

FOUNDER & PRESIDENT

Sets the direction of the work and the standard for what brokers should expect from the people supporting them.



Katie

EXECUTIVE ASSISTANT

Keeps the team coordinated so the work stays moving. The operational glue behind every decision.



Bronwen

OPERATION SPECIALIST &
CUSTOMER SUCCESS

Your frontline contact when a question comes up. Makes sure the right person on the team picks it up, and that nothing sits.



Allie

LEAD STRATEGIST & MARKETING
SPECIALIST

Translates the broker's vision into strategy the team can build around. The connection between where the broker wants to go and how to get there.



One platform. *Fourteen subscriptions replaced.*

DEAL EXECUTION

Document Signing

replaces PandaDoc · DocuSign



\$47/mo

Surveys & Forms

replaces Typeform · Jotform · Wufoo



\$49/mo

CRM

CRM & Pipeline Management

replaces HubSpot · ActiveCampaign



\$99/mo

Workflow Automations

replaces Keap · HubSpot workflows



\$169/mo

Booking & Appointments

replaces Calendly · Acuity



\$29/mo

2-Way Text Marketing

replaces Twilio · Podium



\$99/mo

Call Tracking

replaces CallRail



\$49/mo

MARKETING

Email Marketing

replaces Mailchimp · Constant Contact



\$99/mo

Unlimited Sales Funnels

replaces ClickFunnels · Leadpages



\$297/mo

Website Builder

replaces WordPress · Wix · Squarespace



\$29/mo

Tracking & Analytics

replaces Google Analytics · AgencyAnalytics



\$299/mo

Reputation Management

replaces Birdeye · Podium



\$159/mo

Communities

replaces Skool · Mighty Networks · Circle



\$89/mo

Courses & Products

replaces Kajabi · Teachable



\$99/mo

THE STACK ABOVE, BOUGHT SEPARATELY

\$1,600+ per month

AND THE PART YOU CANNOT BUY ANYWHERE ELSE

DealBuilder. CMs, data rooms, NDAs, and buyer engagement on the same record as your CRM and marketing.

Incalculable.

No subscription replaces a unified deal workflow.

A CRM, on its own, *is still not
a system.*

Even the best one can do everything right and still be one piece sitting alone. A system is what happens when every piece moves together.

Whole. Unified. *Interdependent.*

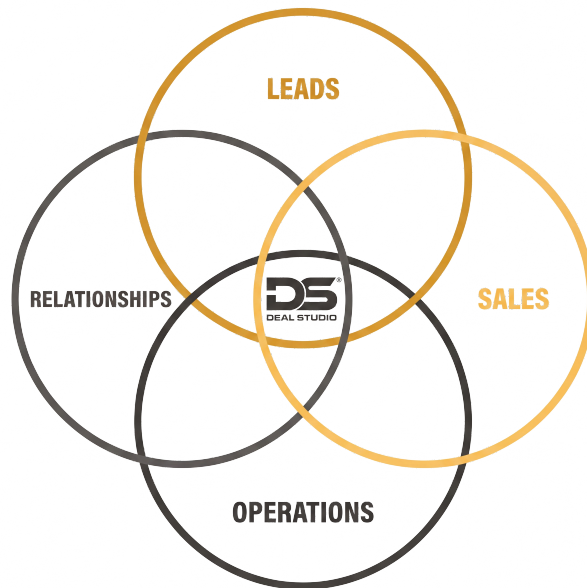
A tool, or even a set of tools, is not a system. A system is the unification of intention, process, and goal. All moving in the same direction, toward one end.

That is what Deal Studio builds for brokers. Not another tool to manage, but the whole that makes the tools worth having.

system *noun*

a regularly interacting or interdependent group of items forming a **unified whole**.

One system, *four domains*.



01

Leads

The right clients, coming in consistently and ready.

02

Sales

Those clients moving from interest to commitment.

03

Operations

Work that runs without you holding it together.

04

Relationships

The ongoing experience that keeps the right clients engaged.

*They are not four problems. They are one strategy: **direction, process, and goals** moving as one.*

One engine. *Everything feeds it, and it feeds everything back.*

The CRM sits in the middle of the line, and it holds both ends. Marketing feeds it every market signal: who clicked, who's warm, who's ready. The engine turns those signals into the next right move, and drives DealBuilder forward: the NDA that goes out, the data room that opens. Every step DealBuilder takes feeds right back into the engine too.

01 · MARKETING

Marketing feeds the engine.

Funnels, outreach, and AI content. Every click and open becomes a signal the engine can act on.

02 · CRM

CRM is the engine.

Pipelines, automation, attribution, and scheduling. Where signals turn into the next right move.

03 · DEAL MANAGEMENT

DealBuilder is what the engine drives.

CIMs, data rooms, NDAs, and buyer engagement. The deal moves forward, and every step feeds right back in.

Because marketing belongs *where the deals live.*



Landing Pages & Funnels

Drag-and-drop pages that convert seller traffic into booked valuation calls.



Email Sequencing & Segmenting

Custom sequences by audience, stage, and behavior. The right message instead of a blast.



Text Message Campaigns

Two-way text outreach from the same record, with every reply routed back to the deal.



Social Media Planner

Plan and schedule posts across Facebook, Instagram, and Google Business Profile from one calendar.



Know Where Leads Come From

The ad, referral, or post behind every lead, tracked from first touch to close.



Behavior Tracking

See what even cold leads open, click, and revisit. Follow up the moment they warm.

· AI content, blogs & SEO drafting

· Reputation management & review requests

· Ringless voicemail drops

The engine *behind every deal.*



Buyer & Seller Pipelines

Every active listing and every active buyer at a glance.



Workflow Automation

Follow-ups, handoffs, and next steps that run themselves.



Booking & Calendar

Sellers and buyers schedule themselves. No email tag.



E-Signing

NDA's and agreements signed inside the same system that tracks them.



Email Marketing

Campaigns and nurture sequences from the record that holds the deal.



Voice Calls & Texting

Two-way calls and text messages, with recording and tracking built in.



Internal Reminders

Off your mind and out of the paper calendar. Alerts in system, email, or text.



Notes & Custom Fields

Every detail on the record, so you never start a call from scratch.

*The goal: better filtering, faster follow-up, and *clearer* decision making.*

Build *the deal*.

DealBuilder sits at the center of every engagement and feeds everything it captures back into the engine.

Build the CIM, qualify the buyer, track the stage, and pull credible comps without leaving the workflow.



CIM Builder

Web-based CIMs with embedded video, financials, and one-click distribution.



Virtual Data Room

Secure due diligence with permissioned access and instant revocation.



Buyer Workflows

Automated NDA flows, granular access controls, and qualified buyer routing.



Deal Tracking

Stage automation, stalled-deal alerts, and clean pipeline visibility.



Engagement Analytics

See who opened what, and when. Turn buyer interest into the next move.



Valuation Conversation Starters

Searchable Business Reference Guide comps that put a defensible range in the listing conversation.

What you have *access to*.

The training, the people, and the intelligence that turn the tools into outcomes.

01

SELF-PACED

DS University

The strategy, the timing, and the why behind every part of the platform. Operate intentionally, not improvised.

02

WEEKLY

Office Hours

Live troubleshooting on your own deals. The fastest path between a stuck moment and a working answer.

03

LIVE + REPLAY

Webinars

Recurring sessions on deal flow, positioning, AI tooling, and broker growth. With a recorded library to return to.

04

BUILT-IN

AI-Powered Tools

CIM production, executive summaries, buyer outreach, and content drafting for the work that used to take hours.



DealBuilder Demo

That's the platform.
*Marketing, CRM, and
Deal Builder, running as
one system.*

Everything you just saw, working together instead of separately.

Even with all of that, *Deal Studio is about more than just a system.*

The platform runs the deals. What we're building now goes further, into growing the brokerage itself, not just the deals moving through it.

This is bigger than a CRM. *It's business development for the broker.*

Two sides to it. Growing the broker's own pipeline and reputation. And making each listing sell faster, for more.

POSITION THE BROKER

Growing the broker's own pipeline and reputation.

Market Research

A clear picture of who's out there and how you compare.

Visibility

Showing up when someone searches for a broker in your market.

Brand & Positioning

Your messaging, voice, and ideal-client profile, the foundation everything else builds on.

Websites

A site that makes sellers raise their hand before they call anyone else.

Lead Generation System

Something to offer, a way to follow up, a path to a booked call.

Paid Ads

Google & Meta, managed, aimed at owners actually thinking about selling.

Social & Content

Content and a social presence that stays in front of your audience, month after month.

Lead Magnets & Client Guides

A resource that starts the relationship long before someone is ready to sell.

Broker Pitch Decks

What you bring into the room when you're sitting across from the seller.

Ongoing Strategy Planning

A standing check-in that keeps growth intentional.

POSITION THE LISTING

Making each listing sell faster, for more.

Comparable-Business Research

Grounding the listing in real market data.

A CIM Built To Sell

The story that persuades a buyer, built from that research.

Executive Summary

The teaser that gets a buyer curious enough to ask for the full CIM.

Listing Page & Copy

A page built to convert interest into a booked call.

Buyer Nurture

A sequence that keeps interested buyers warm until they're ready.

Buyer Journey Mapping

Finding exactly where interest stalls, and fixing it.

Seller Interview

Hearing the story straight from the seller, before the first call.

Distribution & Promotion

Getting the listing in front of the buyer pool actually looking for it.

Clear pricing for *each part of the work.*

The platform is a one-time setup plus a monthly subscription that scales with the number of seats you need. Project work is quoted from a starting point, because what gets built depends on the practice. Either way you have the number before anything is agreed.

THE PLATFORM

SETUP, THEN MONTHLY

From \$597 /mo

\$4,900 one-time setup. Monthly scales with the number of seats.

- Full CRM setup and configuration
- Listings, deals, and contacts in one system
- Buyer and seller automation
- AI CIM Builder and Secure Data Room
- Weekly office hours and Deal Studio University

\$537/mo for IBBA Benefit Partners

WEBSITE

PROJECT

From \$3,500

Quoted to the build. One-time project fee, no monthly cost.

- Brand Sprint to set positioning and messaging
- Tailored design on the Deal Studio platform
- Listings and lead capture wired to the CRM
- Kept up by the design team after launch

CUSTOM SOLUTIONS

PROJECT

Quoted per build

Development fee plus monthly hosting and support. Both agreed before we start.

- A development fee, set once the build is defined
- A monthly hosting and support fee
- Built on the Deal Studio CRM, on your existing data
- Maintained and extended as your practice changes

MARKETING

PROJECT SCOPE

Priced per project

Scoped with a strategist to what the broker needs.

- Market research and positioning
- Comparable-business research and a CIM built to sell
- Lead magnets, client guides, and pitch decks
- Paid ads, Google & Meta
- Listing distribution and promotion
- Ongoing strategy planning

Connected outcomes. A click becomes a lead, a lead becomes a deal, a deal becomes the story that sells the next one.



Strategy. Systems. *Support.*

Partnering with Deal Studio doesn't just change what you do. It changes what you are capable of.

STRATEGY

The thinking behind how your brokerage *is built.*

Everything you just saw on positioning and growth: market research, brand, a marketing system built around your own data. Decided up front, not figured out as you go.

SYSTEMS

The tools and workflows that run *without you.*

The engine you just walked through: CRM, DealBuilder, and marketing, running as one system instead of three logins telling three different stories.

SUPPORT

The team behind your brokerage *as it grows.*

DS University, office hours, and a team that already knows your build. Growing from here doesn't mean starting over.

What could this look like *in your practice?*

That is what a strategy call is for. We walk through how your leads come in, where your deals slow down, and what a system built around your brokerage would change about how you grow.

site.deal-studio.com/book · schedule a strategy call



SCAN TO BOOK A STRATEGY CALL