ENDPOINT SOLUTIONS

AI Readiness — Delivery Report

BH **Beacon Harbor Realty**

Client: Beacon Harbor Realty

Date: 2026-06-18

Prepared by: Michael-Paul Hart, Endpoint Solutions

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OVERALL MATURITY

47

Developing

Combined maturity across the assessed stages.

ENGAGEMENT

Industry: Real estate brokerage

Primary sponsor: Tomás Reyna, Broker/Owner

Executive summary

Beacon Harbor has real AI energy — agents are already using AI to write listings and answer leads — on a decent, cloud-based data foundation. But adoption is bottom-up and ungoverned, and this is a business where an unguarded moment around wire instructions is catastrophic. The near-term work is to put light guardrails and a policy around AI use (especially anything touching client funds or transactions), then convert the scattered agent experiments into a few measured, brokerage-wide wins in lead response and marketing.

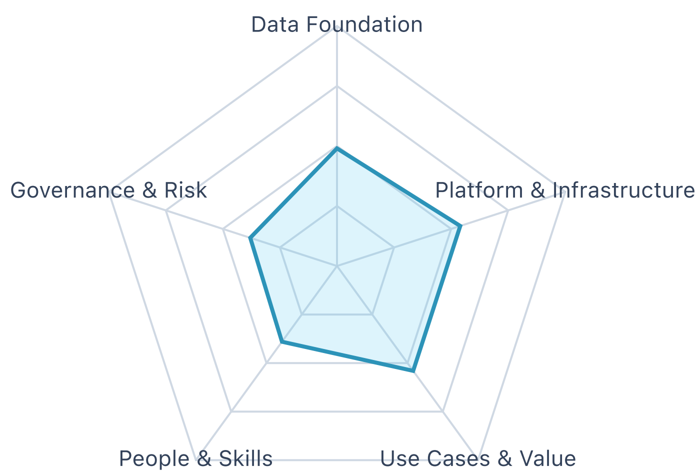
Current-state overview

The brokerage runs cloud-first on a CRM and MLS with reasonably structured contact, listing, and transaction data, though it takes some effort to pull together across tools. Agents are enthusiastically experimenting with consumer AI for listing descriptions, social content, and lead replies — through personal accounts, with no policy and no guardrails around client or transaction data. Leadership sees the upside but has not assigned ownership, and the security posture around wire fraud and business-email compromise is a live concern.

Maturity scorecard

STAGE	SCORE	INTERPRETATION
01 Data Foundation	49%	Developing
02 Platform & Infrastructure	54%	Developing
03 Use Cases & Value	54%	Developing
04 People & Skills	39%	Emerging
05 Governance & Risk	38%	Emerging

Maturity profile



Top findings & business implications

1. **Widespread ungoverned AI use in a wire-fraud–exposed business** — Agents pasting client and transaction details into personal AI tools, with no policy, compounds an already-serious BEC/wire-fraud risk — the single most important thing to get in front of.
2. **Lead response and marketing are the clearest, fastest wins** — AI-assisted lead qualification/response and listing/marketing content map directly to speed-to-lead and agent productivity, and are low-risk when governed.
3. **No owner and no measured value** — Usage is real but scattered across agents; without an owner and a couple of tracked metrics it stays a personal hack instead of a brokerage capability.

Domain observations

01 · DATA FOUNDATION — 49%
Reasonably consolidated contact, listing, and transaction data in the CRM/MLS with informal governance and some access friction. Good enough to build low-risk AI on once guardrails exist.

02 · PLATFORM & INFRASTRUCTURE — 54%
Cloud-first with Copilot available; integration between CRM, MLS, and transaction tools is partial, and there is no model/prompt management. Acceptable for the near-term use cases.

03 · USE CASES & VALUE — 54%
A clear shortlist — listing/marketing content, lead qualification and response, and market/comps analysis — but exploration only, value loosely felt, and ownership sitting informally with a few agents.

04 · PEOPLE & SKILLS — 39%
Literacy is emerging and enthusiasm is high, but skills are individual, no training exists, and change is informal. Adoption is not the problem here — governance is.

05 · GOVERNANCE & RISK — 38%
The dominant gap. The AI policy is still a draft, shadow AI is widespread, security around wire fraud is a live risk, and accountability is unclear. This must be addressed before scaling anything that touches transactions.

Risk register

RISK	AREA	SEVERITY	OWNER
Wire-fraud / business-email-compromise exposure amplified by ungoverned AI	Governance & Risk	Critical	Broker/Owner
Client and transaction data entering personal AI accounts with no policy	Governance & Risk	High	Operations
No owner or measured value for AI usage	Use Cases & Value	Medium	Broker/Owner
Inconsistent, unreviewed AI content reaching clients and listings	People & Skills	Medium	Marketing

Recommended priorities

05 · GOVERNANCE & RISK

Put a policy and wire-fraud guardrails around AI

Publish an AI acceptable-use policy, license approved tools, and tighten verified-wire and BEC controls so agents have a safe, sanctioned way to work.

03 · USE CASES & VALUE

Standardize lead-response and marketing AI

Turn scattered agent experiments into a governed, measured play for speed-to-lead and listing/marketing content across the brokerage.

AI readiness roadmap

0–30 days

ACTION	OWNER	PRIORITY	EFFORT
Publish an AI acceptable-use policy and license approved tools; move agents off personal accounts Outcome: Sanctioned, safe AI use · Vendor: Endpoint	Broker/Owner	High	Low
Harden wire-fraud/BEC controls (verified instructions, MFA, impersonation protection) Outcome: Reduced catastrophic risk · Vendor: Endpoint	Operations	High	Low

31–90 days

ACTION	OWNER	PRIORITY	EFFORT
Assign an AI owner and pick 2–3 metrics (speed-to-lead, hours saved on marketing) Outcome: Usage becomes measurable	Broker/Owner	High	Low
Roll out a governed lead-response + listing/marketing assistant with a shared prompt library Outcome: Faster leads, consistent content · Vendor: Endpoint · Depends on: Policy in place	Marketing	Medium	Medium

91–180 days

ACTION	OWNER	PRIORITY	EFFORT
Add market/comps analysis assistance and light agent training Outcome: Better client conversations · Vendor: Endpoint	Operations	Medium	Medium

181–365 days

ACTION	OWNER	PRIORITY	EFFORT
Improve CRM/MLS integration so AI sees the full client picture safely Outcome: Richer, safer AI context · Vendor: Endpoint	Broker/Owner	Low	Medium

AI tools & vendor ecosystem

VENDOR	ROLE / COVERAGE	RENEWAL / NOTES
Real-estate CRM	Contacts, leads, listings, transactions	Annual — 07/2026
MLS / listing syndication	Listing data + distribution	Annual
Microsoft 365 / Copilot	Productivity + AI assistant	Annual — 03/2027
Transaction management	Contracts, e-sign, closing docs	Annual — 02/2027

Documentation reviewed: Data inventory / catalog — what data exists and where it lives · AI use-case list or backlog / ideas under consideration · AI & ML tools or platforms in use or piloted · KPIs / metrics the business wants AI to improve

Evidence notes: No AI or wire-fraud/data-handling policy was available — both are priority findings. Value metrics are informal; CRM/MLS documentation is partial.

Renewal & contract calendar

RENEWAL	VENDOR	ROLE / COVERAGE
Annual — 07/2026	Real-estate CRM	Contacts, leads, listings, transactions
Annual — 02/2027	Transaction management	Contracts, e-sign, closing docs
Annual — 03/2027	Microsoft 365 / Copilot	Productivity + AI assistant
Annual	MLS / listing syndication	Listing data + distribution

Next steps

1. Review this report with leadership and confirm the priorities.
2. Assign owners and target dates to the roadmap actions.
3. Decide where ongoing technology advisory support is appropriate.

Appendix — discovery responses

01 · Data Foundation

How centralized is your business data?	Some consolidation
Confidence in data quality / consistency	Mixed
Data governance in place?	Informal
How easily can teams access the data they need?	Some friction
Data types you want AI to use	Structured/DB, Documents, Email/Chat

02 · Platform & Infrastructure

Primary environment for workloads	Cloud-first
AI / automation tooling in use	Copilot/M365
Path from pilot to production	None
How integrated are core systems?	Some

03 · Use Cases & Value

Have you identified AI use cases?	A shortlist
Are success metrics defined?	Vaguely
AI pilots underway?	Exploring
Who drives AI use cases?	Business only

04 · People & Skills

General AI literacy across the org	Emerging
In-house AI / ML skills	Limited
AI training / enablement offered?	No
Change management for AI adoption	Informal

05 · Governance & Risk

AI acceptable-use policy?	Drafting
Ungoverned (shadow) AI usage	Widespread
Data security / privacy controls for AI	Basic

AI risk ownership	Unclear

How scoring works

Each answer maps to a 0–100 maturity value based on what it signals. Stage scores are the average of the answered, scored questions in that stage; the overall score is the average of assessed stages. Some questions are informational context and are not scored. Bands: AI-Ready 80+ · Advancing 60+ · Developing 40+ · Emerging 20+ · Unprepared 0+.

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