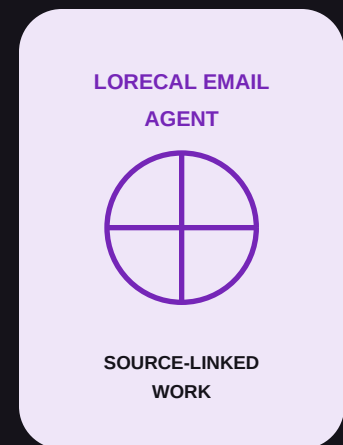


lorecal

LORECAL EMAIL AGENT / FOR BROKER-OWNER TEAMS

The work already exists. Lorecal makes it usable.

Keep the playbook, approved source files and email decisions connected
- so the next action starts with context.



THREE PRACTICAL USE CASES

01

Listing intelligence

Assemble the approved property brief, source documents, comparable notes and next actions before a listing conversation.

02

Deal decisions

Make the rationale behind pricing, diligence, negotiation and follow-up searchable across the work that produced it.

03

Team memory

Preserve the owner's operating playbook and hands-on employee training so teammates can pick up work with source-linked context.

Built for the work that moves by email.

Local LA delivery. Other SoCal by arrangement. Remote-ready.

A deal question, answered with context.

Fictional example using invented people, properties and documents.
It is not a customer testimonial, result or live connector output.

MAYA / LISTING COORDINATOR

Can we send the owner a clean recommendation today?

I have the signed intake, the latest property notes and our call summary. Which facts are approved for the owner update, and what still needs review?

LORECAL / SOURCE-LINKED ANSWER

Use approved facts. Label what still needs review.

Use the approved asking range in Owner Intake / 123 Main, cite the latest comparable set in Market Memo / Q2, and label the repair estimate as pending review. The scoped meeting note records preferred timing, but does not approve a price change.

Next action: draft the update for Maya's review. Route the unresolved repair estimate to the owner before sending.

SOURCES

OWNER INTAKE / 123 MAIN

MARKET MEMO / Q2

SCOPED ZOOM NOTES

COORDINATION

The answer can move into the next approved step.

● EMAIL AGENT

Finds the relevant approved thread and proposes a concise reply for review.

● OPTIONAL SCOPED ZOOM NOTES

Can add selected meeting context when tools and permissions are ready.

● MCP COORDINATOR

Can hand an approved answer to the next workflow when configured.

REVIEWABLE BY DESIGN

The owner keeps the final send decision.

A 30-day pilot, scoped for one team.

A practical starting point for one recurring brokerage workflow,
with the guardrails written before kickoff.

WHAT IS INCLUDED

- One agreed workflow
- One business playbook
- One approved sample set
- AI annotation + source review
- Hands-on employee training
- Practical guide + follow-through

SEQUENCE

01

Choose

one team, permissions
and approved sources.

02

Set up

source review and the
email-agent
walkthrough.

03

Teach

hands-on employee
training and task
review.

04

Evaluate

five tasks and optional
expansion.

DATA + SETUP

CLIENT CONTROL

The client chooses the
workspace, source set, users
and retention rules.

PROCESSING BOUNDARY

Approved samples stay in the
agreed workspace. Any external
AI processing follows the
approved actions and data path.

USE APPROVED SAMPLES

Do not send sensitive records to
request a demo.

COMMERCIAL TERMS

Fixed pilot scope and price agreed in writing before kickoff.

Access, retention and connector permissions are agreed before kickoff.

Optional Zoom or MCP expansion depends on tools, permissions and the agreed data path.

See the workflow in 30 minutes.

A focused walkthrough ends with a concrete readiness check and a written pilot decision.

AGENDA

- 0-5** Pick one workflow and its success criteria.
- 5-12** Walk through playbook, sources and an email question.
- 12-20** Walk through annotation, the email-agent path and optional integrations.
- 20-26** Compare five evaluation tasks before and after context.
- 26-30** Confirm readiness, scope and the next decision.

READINESS CHECK

- ✓ Owner or operations lead can approve
- ✓ One repeatable workflow is named
- ✓ Approved sources can be identified
- ✓ Workspace owner can set permissions
- ✓ One named everyday workflow user can test

FIVE-TASK EVALUATION

- 01 Find** the approved fact in a property or client packet.
- 02 Explain** the decision and cite its source.
- 03 Draft** a reviewable owner or client email.
- 04 Hand off** the next action to the right teammate or workflow.
- 05 Learn** complete one hands-on employee lesson.

READY TO TALK?

Request a demo at lorecal.com/book

Local LA delivery. Other SoCal by arrangement.

Share a preferred time; availability is confirmed separately.

See the broker workflow at lorecal.com/brokers