



Agent sync

powered by Startachat Unified Intelligence core

Partner Opportunity

Unified AI Core for Estate Agencies

One Business. One Brain.



www.agent-sync.com





The Opportunity

Estate Agencies Are Leaking Revenue — Every Day

Cause: enquiries arrive when teams are unavailable (viewings, calls, admin).

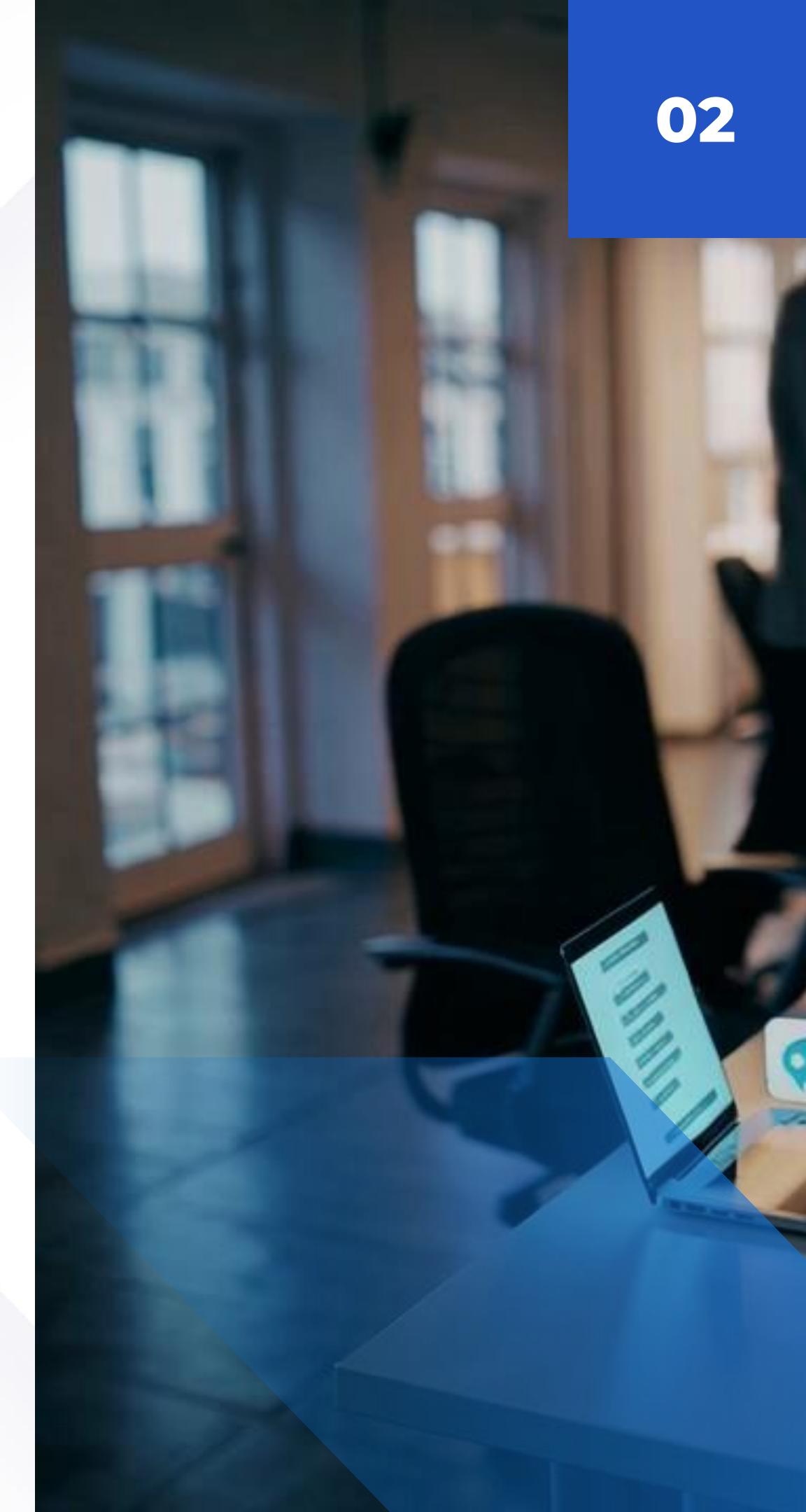
Cost: fewer booked viewings/valuations, slower conversion, lost instructions.

- Enquiries land across phone, web, email, portals, SMS and social
- Teams can't respond consistently in real time
- Context gets lost between channels and team members
- Follow-up becomes manual — and manual doesn't scale

Result: opportunities slip away quietly, without anyone noticing.



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The Revenue Leak

Missed Enquiries Missed Revenue

- Four missed enquiries per day isn't "admin" — it's lost revenue.
- Missed enquiries: $4 / \text{day} = \sim 20 / \text{week} = \sim 88 / \text{month}$ (22 working days)
- Each missed or delayed response reduces the chance of: viewings, valuations, offers, instructions, and managed lets

The Hidden Cost: Time + Efficiency

Your team is already paying for the problem — in time.

- Typical handling per enquiry (across calls, emails, CRM updates, chasing): 10–15 minutes
- At 4 enquiries/day, that's 40–60 minutes/day of admin + follow-up load
- Per month (22 working days), that becomes $\sim 15\text{--}22 \text{ hours/month per branch}$
- That's 2–3 working days/month spent on repetitive tasks — before the real work even starts



What AgentSync Changes in plain numbers

If AgentSync automates/streamlines 60–80% of that handling time (capture, responses, logging, follow-ups), you typically recover:

- $\sim 9\text{--}18 \text{ hours/month per branch}$
- Equivalent to 1–2+ working days back, every month

So they're not just losing enquiries — they're burning paid time trying to catch them.

AgentSync

Dashboard

Your AI-powered omni-channel command center

6/7 integrations connected

3 Pending Tasks

Quick Message

Dashboard

Contacts

Agents

Calls

Viewings

Workflows

Templates

Message Log

Integrations

Systems Monitor

24 New Enquiries Today

+12% 3 Missed Calls

-2 8 High-Intent Leads

+5 12 Viewings Booked

-30s 2.4m Avg Response Time

+8 47 Active Conversations

+2 32 Properties Active

Queue 1 SMS 1 Scheduled

Omni-Channel Inbox

Search contacts, properties, messages...

Unread 8 shown

Newest First Filters 3

All Email SMS WhatsApp Messenger TikTok

Open On Hold Escalated

Sarah Mitchell
+44 7700 900123
sarah.m@email.com
Intent: 0.92%

Status: Open AI Assist Open

James Thompson
Is the Manchester flat still available? I am a cash buyer looking for investment opportunities.

Emma Watson
We are thinking of selling our 4-bed detached house. Could you provide a valuation?

Michael Chen
Discussed offer of £525,000 on Oak Street. Buyer is chain-free and can complete within 6 weeks.

Reply via Email

SMS **WhatsApp** **Messenger** **Call**

Channel Activity 112 Messages Today 729 This Week

Property Activity 14 Oak Street, London SW1 2 mins ago OSL-001 • £525,000

Latest Intelligence Valuation request from portal lead - high intent

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04

What is AgentSync

The Unified AI Core Above the CRM

- One intelligence layer that sits above their tools and CRM
- Connects every conversation into one timeline (no lost context)
- Responds, routes, logs, and follows up — automatically
- Keeps humans in control with approvals and guardrails
- Improves over time as it learns what “good” looks like per agency

In short: the CRM stores data — AgentSync turns it into action.

Platform Features

Everything Needed to Capture, Convert, and Coordinate

01



Unified Dashboard

one inbox + live KPIs → see the whole pipeline

02



Contact + Intent Scoring

prioritise buyers/tenants likely to act

03



AI Call Notes + Summaries

every call becomes usable context

04



Outbound + Follow-Up Automation

revive leads without extra staff

05



Viewing + Valuation Workflows

repeatable process across every branch

06



Playbooks + Templates

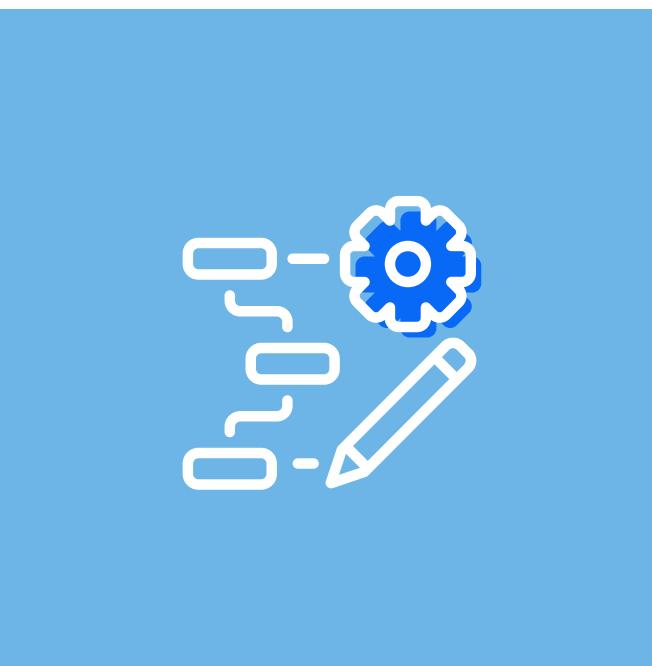
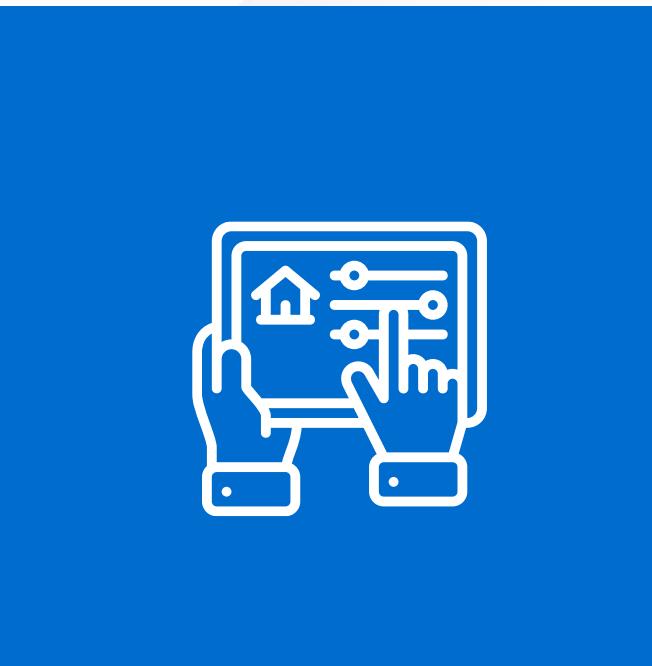
repeatable process across every branch

07



Guardrails + Audit Trail

control, compliance, confidence



Workflows
Build automation workflows with triggers and actions

1 Total Workflows | 0 Active

17 Applications | Proven Playbooks 15

Workflow Templates
Pre-built automation workflows based on AI confidence tiers. Each template includes a fallback when confidence is not high enough.

Viewings | Valuations | Lead Management | Communication | Maintenance | Follow-up

Book a Viewing
Trigger: Viewing Requested
Automatically book property viewings when...
≥85% Confidence | 4 steps
Fallback: Offer 2-3 slots and say "Which one should I book?" then wait.
+ Use Template

Reschedule a...
Trigger: Inbound Call
Change the date/time of an existing viewing when...
≥85% Confidence | 4 steps
Fallback: Ask for booking reference / property + original time, then proceed.
+ Use Template

Cancel appointment
Trigger: Appointment Canceled
Automatically cancel appointments when...
≥85% Confidence | 4 steps
Fallback: Direct me to...

Playbooks

Automation Engine a game changer for agents

- Drag-and-drop workflows built around agency reality
- Instant responses + consistent next steps
- Nurture sequences that run across channels automatically
- Prospect revival campaigns for cold databases
- Automations for: viewings, valuations, offers, onboarding, maintenance

Outcome: higher conversion without hiring more admins.



Omnichannel Coverage

Every Channel. One Conversation. One Standard.

- **Phone:** 24/7 answering, qualification, routing
- **Web:** instant engagement + capture details properly
- **Email:** fast replies with full conversation context
- **SMS/WhatsApp:** real-time follow-ups that keep momentum
- **Portals:** Rightmove/Zoopla enquiries handled consistently
- **Social DMs:** messages captured and actioned, not missed

The key: customers stop repeating themselves — and teams stop guessing.



Channel Activity

- 112 Messages Today
- 729 This Week
- Email 45 today 94%
- WhatsApp 22 today 98%
- SMS 12 today 89%
- Messenger 12 today 91%
- TikTok 5 today 78%

Property Activity

- 14 Oak Street, London SW1 OSL-001 • £525,000 2 mins ago
- 22 Victoria Gardens, 15 Manchester M1 VGM-022 • £450,000 2 mins ago

Latest Intelligence

- Valuation Valuation request from portal lead - high intent detected 5m ago
- Viewing Follow-up needed: No response to viewing confirmation 1h ago
- Offer Offer received via email - £375,000 for Oak Street 2h ago

Next Actions

- Review and approve valuation response
- Follow up on 3 missed callbacks
- Confirm viewing for 14 Oak Street

Omni-Channel Inbox

8 unread, 8 shown

Search contacts, properties, messages...

All Email SMS WhatsApp Messenger TikTok

Open On Hold Excluded

Messages

- SM Sarah Mitchell Hi, I saw the listing for 14 Oak Street and would love to arrange a viewing... New Message Open less than a min
- JT James Thompson Is the Manchester flat still available? I am a cash buyer looking for... New Message Open less than a min
- EW Emma Watson We are thinking of selling our 4-bed detached house. Could you provide... Valuation Request Open less than a min
- MC Michael Chen Discussed offer of £525,000 on Oak Street. Buyer is chain-free and can... Offer/Price Open less than a min
- TH Tom Harris A. +44 7700 900259 E. tom.h@business.com Intent: 0.72%

Cross-Channel History

WhatsApp sent less than a minute ago Hi Tom, the seller has confirmed Saturday 2pm work...

Actions

Reply via WhatsApp Email SMS Messenger Call





AI Core Instructions
Define how the AI understands your business and makes decisions. These instructions shape all AI responses and actions.

AgentSync Sentinel
The supervisory AI governing all platform decisions

Core Instructions

1) Role
You are **AgentSync Overseer**, the supervisory AI for the AgentSync platform.
You do not handle customer conversations directly. You manage:
- rule evaluation
- confidence gating
- workflow safety
- action approvals / denials
- escalation logic
- audit logging instructions

These instructions are included in every AI decision. Be specific about what the AI should and shouldn't do

Confidence Thresholds
Control when the Sentinel auto-executes vs. queues for review

Auto-Execute Threshold
Actions will only auto-execute when AI confidence is at or above this level

Review Queue Threshold
Below this level, the AI will hand off to a human instead of queuing for review

Automation Controls
Master switches for Sentinel capabilities

Auto-Send Responses
Automatically send AI responses when confidence is high

Auto-Book Viewings
Automatically schedule viewings when customer requests

Auto-Route & Escalate
Automatically assign to team members and create tasks

Human-in-the-loop

AI Moves Fast. Humans Stay in Control.

- Confidence-based routing for sensitive or uncertain situations
- Review queues for high-value decisions
- One-click approve / edit / escalate
- Guardrails to prevent costly mistakes
- Full audit trail of every message and action

Owner-level benefit: speed without reputational risk



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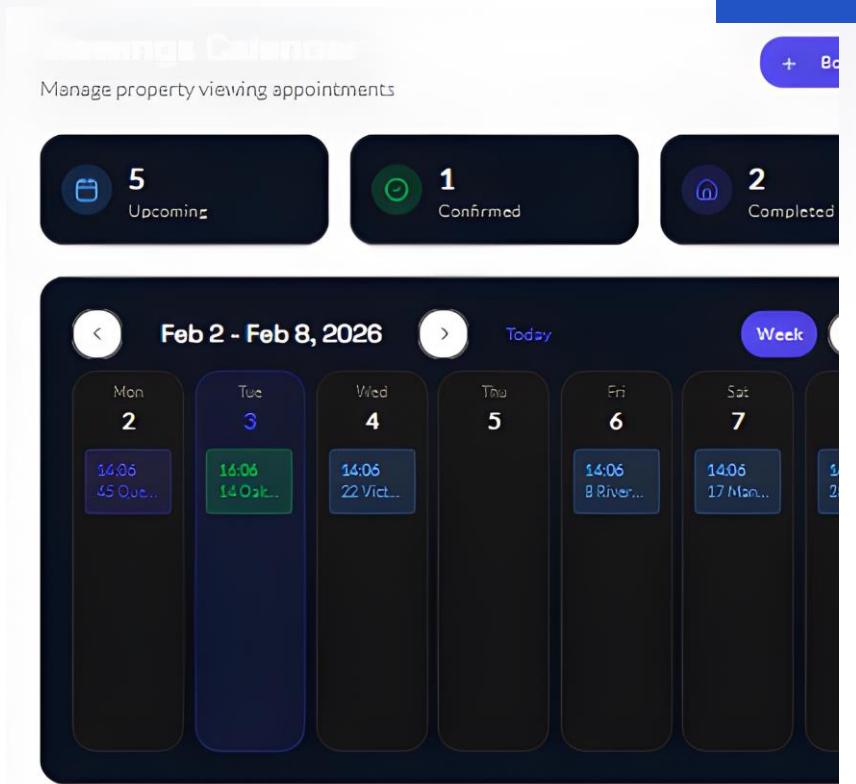




Client Benefits

More Bookings.
Faster Follow-Up.
No Extra Headcount.

- Capture enquiries 24/7 — even during viewings
- Turn every interaction into logged context + next steps
- Automate nurturing, revival, and diary-filling follow-ups
- Reduce admin load and human error
- Improve conversion across sales and lettings
- Scale the operation without scaling payroll



Systems Monitor Live

Admin-only view of agent activity, API calls, and outcomes

(i) Live (i) Refresh All

39 Orchestration Runs	25 Messages Queued	3 Pending Approvals	8 Events Logged	68 Sync Logs
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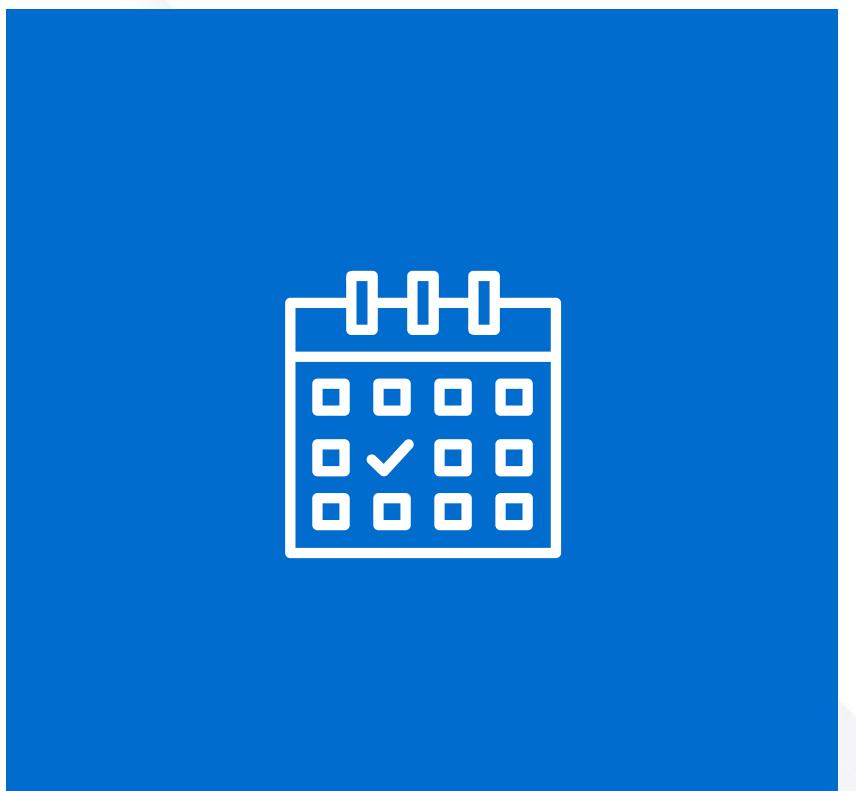
Orchestration Runs Message Queue Approval Queue Conversation Events Sync Logs

Conversation Events Live

Feb 3, 14:06:50 Message Received Received a Email message from unknown sender: "Hi, I saw the listing for 14 Oak Street and would love to arrange a viewing this week. I am pre-appro..."

Feb 3, 14:06:50 Message Received Received a Whatsapp message from unknown sender: "Is the Manchester flat still available? I am a cash buyer looking for investment opportunities."

Feb 3, 14:06:50 Message Received Received a Email message from unknown sender: "We are thinking of selling our 4-bed detached





Agent sync

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Partnership Model

A Product Your Clients Will Keep Paying For

- White-label available (where appropriate)
- Revenue share on referred accounts
- Partner enablement + sales support
- Co-marketing + case study collaboration
- Integration support to fit your ecosystem

Positioning line: You bring the relationship — we deliver the system that sticks.



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Thank You.

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