

SOFTWARE · CONSULTING · TRAINING

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# The Operating System for *Institutional* Real Estate

CRE10X CONFERENCE  
2026 · OPERATING SYSTEMS



START HERE

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One partner for platform, data, and AI enablement across institutional commercial real estate — from the rent roll to the boardroom.

# A Letter to the CRE Community

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CREx was founded on a simple belief: commercial real estate shouldn't be this complex. Every firm deserves institutional-grade technology — regardless of its size or balance sheet.

For too long, the best tools were reserved for the largest firms. Everyone else was left stitching together spreadsheets, exports, and disconnected dashboards that never quite agreed with one another.

CREx was built to change that — a purpose-built operating system, vendor-neutral consulting, and AI training designed by operators who have actually run portfolios — not generalist consultants or software vendors with a pitch.

To the CRE10x community who trusted us with your most important asset — your data — thank you. We're just getting started.

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## Vimal Vachhani

FOUNDER & CEO · CREX SOFTWARE



*"Every firm, no matter its size, deserves institutional-grade technology."*

PLATFORM OVERVIEW

# One Partner. Platform, Data, and *AI Enablement.*



BUY A PRODUCT. ENGAGE A SERVICE. OR RUN THE WHOLE STACK.

# The unified operating system for institutional asset management.

CREx OS replaces the fragmented stack — spreadsheets, disconnected dashboards, and manual rent roll reviews — with one purpose-built platform. From data ingestion to proactive insight to investor output, every workflow lives in one place.

- **Portfolio command center** with role-based hierarchies
- **AI rent roll & financial review** — anomaly detection in minutes
- **Financial analytics** — dashboards, period comparisons, T-12 forecasting
- **Multifamily analytics** — collections, leasing, occupancy, budgets
- **Commercial analytics** — rent rolls, leasing performance, collections
- **Debt & loan management** with covenant monitoring
- **Comp database** & market research
- **Proactive alerts** & AI-powered anomaly detection
- **Go headless** in the AI tool of your choice with our MCP



PRODUCT · CREX OS DASHBOARD

85%

AUTOMATION EFFICIENCY

12x

FASTER DATA ANALYSIS

100%

CLOUD-BASED

80%

COST CUT · RENT ROLL REVIEW

## DI

SOFTWARE · AI UNDERWRITING

## AI-powered deal screening, built for acquisitions teams.

CREx Deal Intelligence brings AI to the front of your acquisitions pipeline — screen deals faster, synthesize comps automatically, and support underwriting with purpose-built tools.

- The fastest **email-to-deal-board** automation in the market
- **Deal database** & pipeline management
- **AI-powered OM synthesis** & abstraction
- **Underwriting QA** & deal screening at 10× velocity

SCREEN · DEAL BOARD

## PM

SOFTWARE · DATA AGGREGATION

## One normalized layer for every third-party property manager.

Aggregate rent rolls, general ledgers, and reporting from every third-party PM into a single, clean data model — one source of truth, refreshed daily.

- **100+** PM connections & counting
- Feeds from **Yardi, MRI, RealPage, Entrata, AppFolio, ResMan**
- Reads files in **any format or language**
- Extracts from **API and CSVs**
- **Daily automated** feeds
- **Normalized** semantic model across sources

SCREEN · UNIFIED DATA

*"Franklin Street has been looking to analyze our Yardi data for many years. But none of our past initiatives gave us the insight, ease of use, and flexibility that we achieved by partnering with CREx."*



**Tom Rybak**

CTO · FRANKLIN STREET

# From years of trying to finally having the answer.

## THE CHALLENGE

Franklin Street had attempted PMS analytics for years. Each past initiative proved too rigid or too complex to live with — and the insight never arrived.

## THE CREX SOLUTION

CREx OS paired with PM Integration delivered a unified data layer and tailored dashboards — without requiring Franklin Street to stand up a data team.

## THE OUTCOME

- Unified portfolio visibility across all assets
- Analytics without manual report pulls
- The fastest implementation the team had experienced

**Years → Days**

TIME TO INSIGHT

**1**

UNIFIED DATA LAYER

**Zero**

MANUAL REPORT PULLS

# Make real estate tech decisions with *clarity*.

Most CRE firms don't have a software problem — they have an ownership problem. Blueprint starts with the org chart and ends with a go-live. Vendor-neutral. Operator-led.

PHASE 1 · ASSESS

## Assess

Map current tech stack, data topology, and process gaps.

OUTPUT: CURRENT-STATE REPORT

→ PHASE 2 · DECIDE

## Decide

Evaluate ERP candidates against your real needs.

OUTPUT: VENDOR SCORECARD

→ PHASE 3 · DELIVER

## Deliver

Implementation support, data migration, project governance.

OUTPUT: WORKING GO-LIVE

→ PHASE 4 · OPERATE

## Operate

Ongoing BAU support for adoption and stability.

OUTPUT: MANAGED ENABLEMENT

HANDS-ON, NOT A DEMO

## Deploy AI in your shop.

CREx operators embed inside your team and ship working automations against your portfolio data — not a sandbox demo.

- Operators embed in your team
- Automations on real data — rent rolls, models, IC process
- Acquisitions, AM & IR coverage

*Most clients start with training and move into implementation once the team is fluent.*

ERP ADVISORY & SELECTION

SYSTEM RATIONALIZATION

BUSINESS PROCESS ASSESSMENT

YARDI IMPLEMENTATION

# Two practices, one standard of operator-led rigor.

## CREX CORE

CONSULTING · DATA, ANALYTICS & AI

### A governed data foundation with AI copilots — deployed on Microsoft Fabric.

- Sanctioned Yardi data pipelines
- Prebuilt report library
- Governed AI copilots for asset & portfolio teams
- Power BI dashboards tailored to CRE stakeholders

## CREX SIGNAL

CONSULTING · INVESTMENT OPERATIONS

### Modernize how your credit or equity fund runs — from deal to distribution.

- Investment management advisory
- Capital management & reporting
- Research support
- One performance layer from deal to distribution

*"CREx has been the easiest, most hands-off implementation that my team has ever done. We can now analyze and uncover trends in our property data without having to manually pull reports from third-party managers."*



**Brian Cohn**

CIO · FCP

# From manual pulls to automatic insight.

## THE CHALLENGE

FCP relied on manual report pulls from third-party managers — time-consuming, inconsistent, and always a step behind the portfolio.

## THE CREX SOLUTION

PM Integration automated aggregation from every third-party manager into a normalized layer feeding live CREx OS dashboards.

## THE OUTCOME

- Eliminated manual report pulls entirely
- Portfolio trends surfaced automatically
- The fastest, most hands-off implementation experienced

**Hands-Off**

IMPLEMENTATION

**Automatic**

TREND ANALYSIS

**Zero**

MANUAL PULLS

# AI training for *commercial real estate* teams.

Two ways to work with us — train your team to use AI well, or have CREx operators deploy automations directly into your workflows.

## PATH 01 · AI UPSKILLING

THREE PILLARS · SIX TRACKS

01

### Portfolio Strategy & Infrastructure

AI for Property Mgmt

Investor Relations

02

### Institutional Intelligence Engine

Asset Management

Accounting & Finance

03

### Agentic Workflow Deployment

Acquisitions

Executives

12 HRS SAVED / ANALYST / WEEK

87% WEEKLY ACTIVE AI USAGE

100% CERTIFICATION COMPLETION

## PATH 02 · AI DEPLOYMENT

CREx operators embed inside your team and ship working automations — not a sandbox demo.

- Operators embed in your team
- Automations on your real data
- Acquisitions, AM & IR coverage

*Most firms start with training and graduate to implementation once the team is fluent.*

# Built with the leading systems institutional CRE already runs on.

CREx plugs into your existing stack — it doesn't replace it.

## PMS CONNECTORS

Yardi	MRI Software	RealPage
Entrata	AppFolio	ResMan

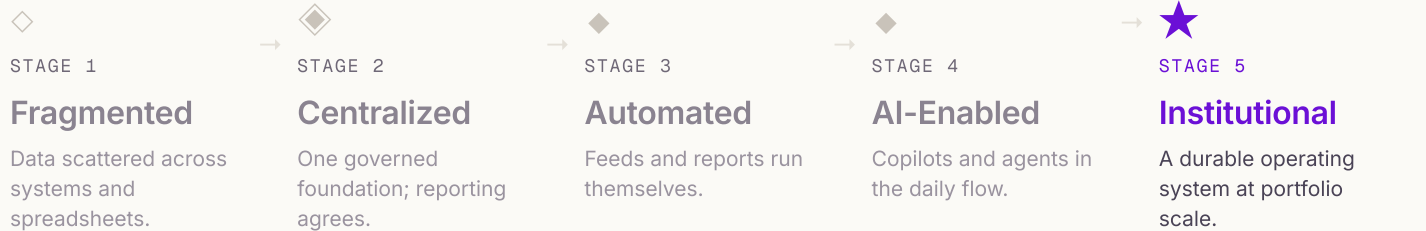
## AI LAB PARTNERS

Anthropic Claude	Microsoft Copilot
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*"Your stack. Our intelligence. Better together."*

# Where is your firm on the data and AI journey?

Every firm sits somewhere on this path. We meet you where you are — and chart the route to institutional.



WHERE ARE YOU TODAY?

BOOK A SCOPING CALL · [CREXSOFTWARE.COM](https://crexsoftware.com)

# Why CREx.

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## Tech Without the Bloat

No over-engineered tools. Clean, scalable solutions for the problem in front of you — not the imaginary enterprise of five years from now.



## Partnership Over Product

CREx doesn't just sell software. The team becomes an extension of yours — from scoping through go-live and beyond.



## Transparency Drives Trust

CREx uses the same dashboards built for clients. We're building for the long term — not the next funding round.

*"We use the same dashboards we build for our clients."*

# Ready to stop reconciling and *start operating?*



BOOK A DEMO



EXPLORE CREX OS



ENROLL IN CRE10X

**CREX**