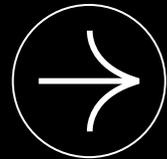


# THE C-SUITE PLAYBOOK FOR CRE

**How Top Brokers and Firms Connect with  
Decision-Makers Intelligently and Authentically**



## 9 Proven Sales & Marketing Strategies for 2026

15-Minute Read. Backed by research from LinkedIn, McKinsey, Gartner, ITSMA, and Sam.ai



**Generating  
Referrals & Warm  
Intros with AI**

**Becoming  
influential in your  
ideal client's inbox**

**Be first to know  
who's in-market  
with intent data**

**Using Agentic AI to run  
appointment setting  
campaigns**

**SAM**<sub>ai</sub>



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# Executive Summary

In commercial real estate, success often hinges on access — specifically, access to the C-Suite. These decision-makers, from CEOs and CFOs to VPs and Managing Directors, evaluate opportunities through a lens of strategy, data, and long-term value. Traditional approaches built on persistence or personality alone no longer resonate. The modern executive operates in an environment defined by information saturation, analytical rigor, and heightened expectations for authenticity.

Over the past decade, the dynamics of business development have shifted dramatically. Relationship-building remains essential, but it must now be guided by intelligence — both human and artificial. Understanding how to engage executives effectively requires aligning insight, timing, and precision. That principle has shaped the foundation of Sam.ai since its inception in 2016: empowering professionals to build meaningful, data-driven relationships that translate into measurable growth.

The strategies presented in this eBook are grounded in real-world experience and supported by research from *LinkedIn*, *McKinsey*, *Gartner*, *eMarketer*, and *ITSMA*. Collectively, they reflect a modern framework for executive engagement — one that prioritizes value over volume, context over contact, and intelligence over intuition.

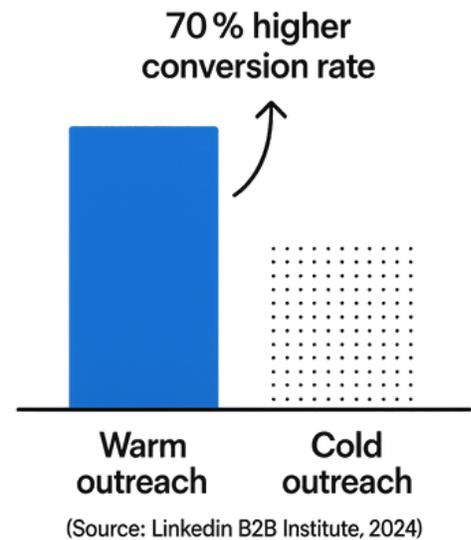
The final section, **The Inside Track: The Shortcut to Smart Growth**, offers a concise roadmap for putting these insights into practice — bridging strategy with execution to achieve sustained results.



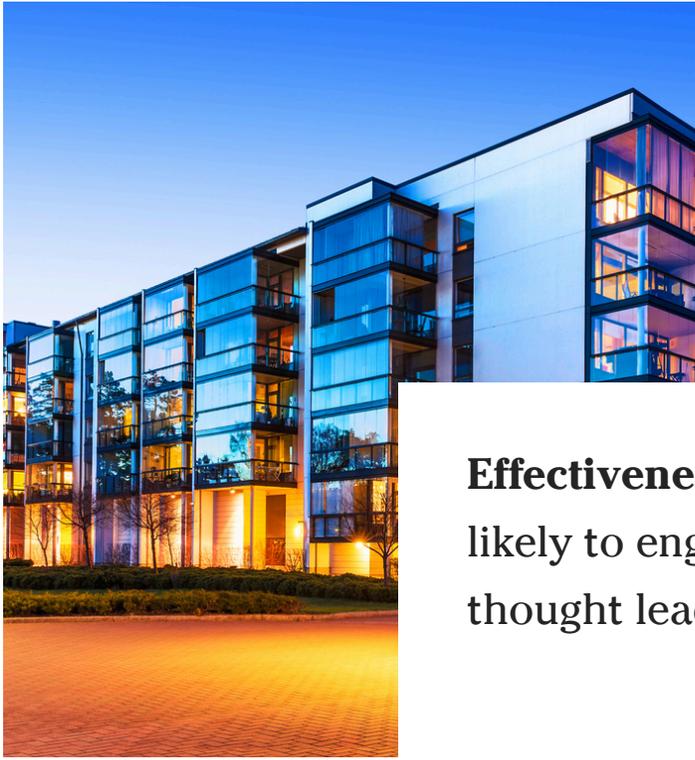
# Warm Introductions & Referrals

**Effectiveness:** 70% higher conversion rate than cold outreach (Source: LinkedIn B2B Institute, 2024)

Executives buy from people they trust. In CRE, referrals remain the single most powerful path to new business because they accelerate trust formation. A McKinsey study found that 82% of B2B executives rely on recommendations from peers when choosing a new service partner (Source: McKinsey, 2024).



For CRE professionals, that means cultivating a network of satisfied clients, collaborators, and industry influencers. A single referral from a trusted relationship can outperform months of cold prospecting. Leverage platforms like Sam.ai & LinkedIn to identify shared connections, and encourage advocates—especially clients with measurable success stories—to make introductions. Combining social proof with personal endorsement humanizes your outreach and elevates your credibility instantly.

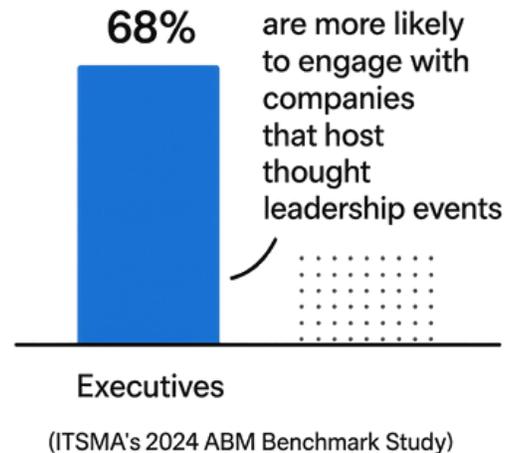


## Thought Leadership & Roundtables

**Effectiveness:** 68% of executives are more likely to engage with companies that host thought leadership events

C-suite executives value dialogue, not sales pitches. Webinars and roundtables that spotlight relevant market insights—such as CRE trends, capital markets outlooks, or tenant experience innovations—position your brand as a peer, not a vendor. ITSMA’s 2024 ABM Benchmark Study found that 68% of executives are more likely to engage with companies that host thought leadership events where peers share their experiences.

### Effectiveness



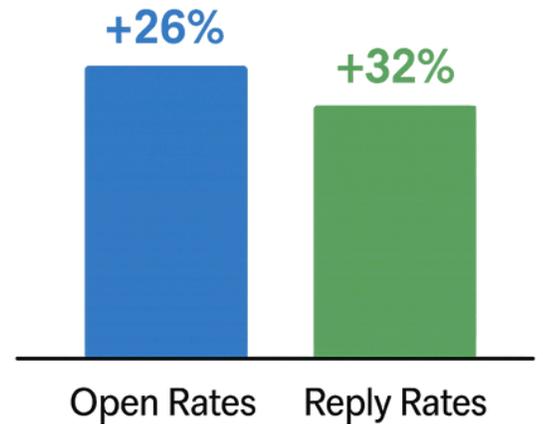
Focus on why these conversations matter — how market shifts, financing trends, or ESG initiatives shape decisions. Host sessions with respected voices, invite targeted prospects, and encourage open dialogue. A well-run CRE roundtable builds lasting connections and produces reusable assets — recordings that can be repurposed into blogs, podcasts, or social media content to extend your thought leadership.



## Intelligent E-mail Outreach

**Effectiveness:** LinkedIn data shows that personalized subject lines increase open rates by 26%, while referencing a company milestone boosts reply rates by 32% (Source: LinkedIn, 2024).

Despite the rise of automation, personalized email remains the backbone of C-suite engagement. The key is relevance. Executives respond when a message speaks directly to their priorities—portfolio optimization, tenant retention, sustainability, or capital efficiency. LinkedIn data shows that personalized subject lines increase open rates by 26%, while referencing a company milestone boosts reply rates by 32% (Source: LinkedIn, 2024).



(Source: LinkedIn, 2024)

In CRE, use specific triggers: a new property acquisition, leadership appointment, or regional expansion. Keep your email short—ideally under 125 words—and focus on insights, not offers. A strong email conveys understanding and curiosity: “I noticed your firm’s recent investment in Austin—many of our CRE clients are seeing similar migration patterns and optimizing for flexible leasing models. Would you be open to sharing perspectives?” That level of relevance earns responses.

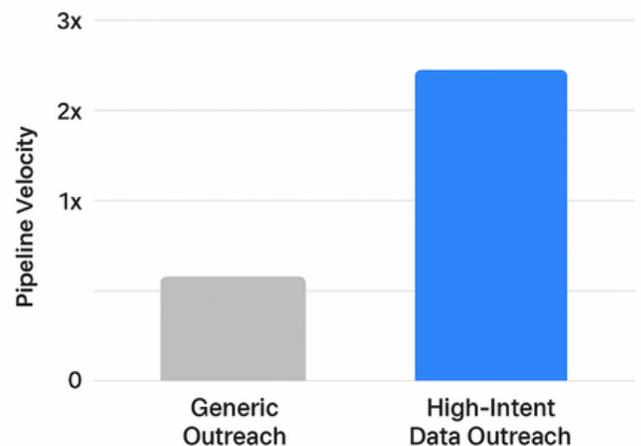


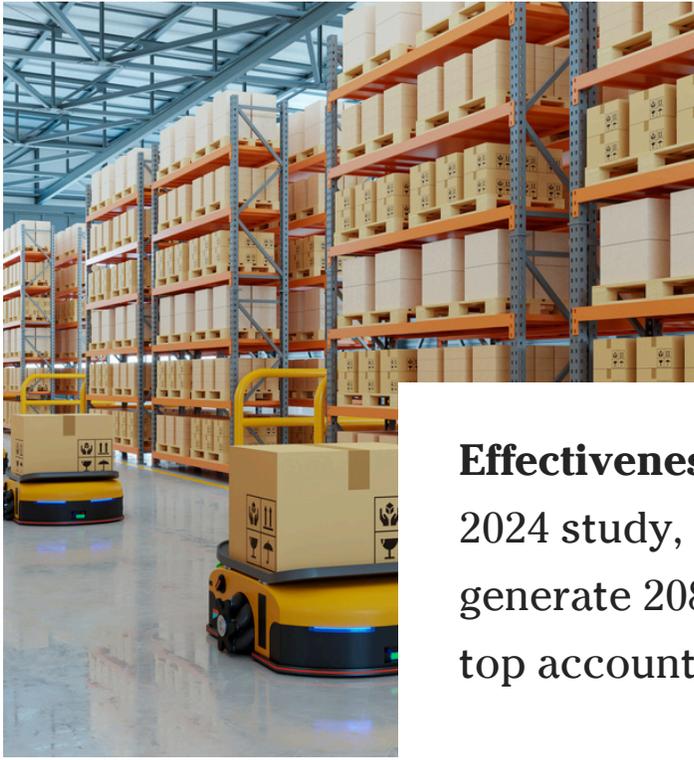
## High-Intent Data Action

**Effectiveness:** According to Gartner’s 2024 report, organizations using intent data experience a 30% higher close rate.

Intent data reveals when executives are actively researching a topic or service—an invaluable signal in CRE, where timing often determines deal success. According to Gartner’s 2024 report, organizations using intent data experience a 30% higher close rate. For CRE executives, these signals include corporate relocations, funding announcements, or major lease expirations.

Using high-intent insights, firms can prioritize outreach precisely when a prospect is evaluating options. A CFO reading about “lease renewal” or “office space rates” may be a signal that a deal is imminent. Integrating these insights into your CRM ensures that every call or email lands at the right moment—making your outreach feel predictive, not pushy.



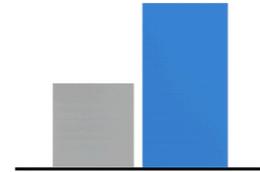


## Account-Based Marketing

**Effectiveness:** According to McKinsey's 2024 study, firms that deploy ABM generate 208% more revenue from their top accounts.

In CRE, where deal values are high and relationships span years, Account Based Marketing (ABM) delivers results by aligning sales and marketing around specific target accounts. Instead of casting a wide net, ABM enables precision engagement with decision-makers across a small set of high-value companies.

**208%**  
more revenue



(Source: McKinsey, 2024)

According to McKinsey's 2024 study, firms that deploy ABM generate 208% more revenue from their top accounts. For CRE firms, that means customizing outreach for each investor or occupier. Combine tailored insights, personalized visuals, and multi-channel touchpoints—email, LinkedIn, webinars—to build familiarity over time. ABM turns outreach into orchestration—each touchpoint reinforcing your understanding of the client's business strategy.



## LinkedIn Engagement

**Effectiveness:** Executives are 62% more likely to reply to messages from individuals they've seen interact on their feed multiple times.

LinkedIn remains the premier relationship-building platform for CRE executives. Yet, the best outreach starts before the first direct message. By thoughtfully engaging—liking, commenting, or sharing posts—you create name recognition and trust before ever reaching out.

62%

more revenue



(Source: LinkedIn, 2024)

Comment on leadership updates, share relevant insights, or tag executives in posts about market reports. According to LinkedIn's B2B Trends 2024 study, executives are 62% more likely to reply to messages from individuals they've seen interact on their feed multiple times. This approach mirrors real-world relationship-building: you show up, contribute value, and then introduce yourself naturally.



## Personalized Video Messaging

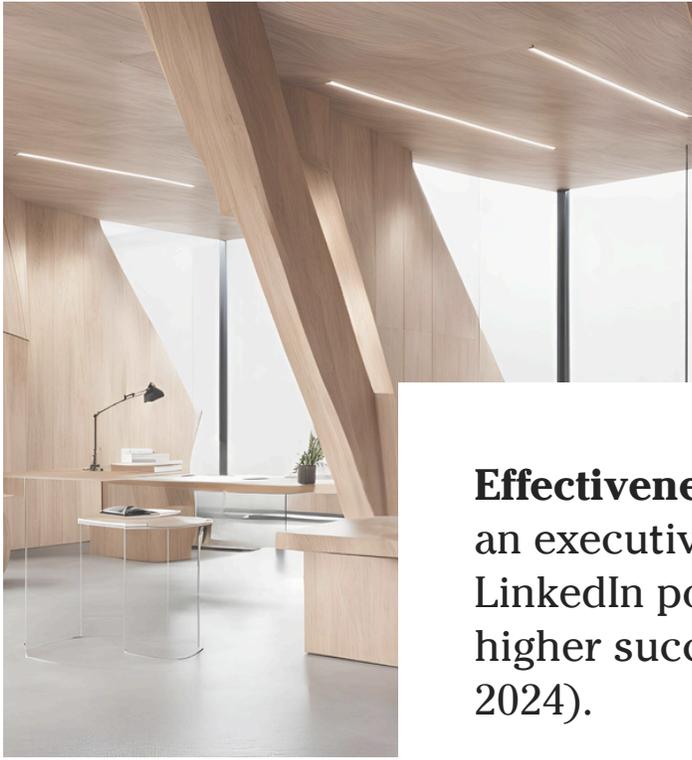
**Effectiveness:** Vidyard's 2024 State of Video Selling report shows that personalized videos deliver 3x higher engagement rates.

In a world saturated with text, video humanizes communication. A short 60–90 second video can convey warmth, clarity, and professionalism that text alone can't. Executives appreciate the effort—it demonstrates intentionality. Vidyard's 2024 State of Video Selling report shows that personalized videos deliver 3x higher engagement rates.

personalized  
videos  
**3x**  
higher engagement  
rates

(Source: Vidyard, 2024)

In CRE, use video to introduce a new offering, recap a proposal, or invite a prospect to a private event. Look directly into the camera, mention the executive's name, and reference a recent success or market trend. This small personal touch cuts through inbox noise and leaves a lasting impression.



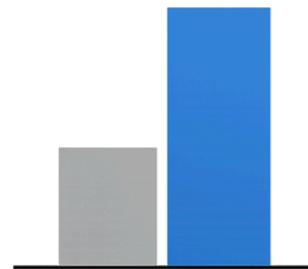
## Cold Calling - Timely

**Effectiveness:** Calls placed shortly after an executive interacts with your email, LinkedIn post, or webinar see up to a 4x higher success rate (Source: Gartner, 2024).

Cold calling is far from dead—it's just evolved. In 2025, effective calling isn't about volume; it's about timing and insight.

Calls placed shortly after an executive interacts with your email, LinkedIn post, or webinar see up to a 4x higher success rate (Source: Gartner, 2024).

up to  
**4x**



(Source: Gartner, 2024)

For CRE professionals, intelligent calling can be the difference between interruption and opportunity. Reference a specific article the executive engaged with or a property transaction recently announced. Smart follow-ups signal attentiveness, not aggression—and that nuance turns cold calls into meaningful conversations.



## Retargeting Ads to Email Prospects

**Effectiveness:** According to eMarketer's 2024 study, retargeting increases lead-to-opportunity conversion by 26%

Retargeting keeps your brand in the executive's periphery. In CRE's long sales cycles, top-of-mind awareness is critical. By layering LinkedIn or Google Ads over your email campaigns, you ensure that decision-makers continue to see your brand as they research properties, review portfolios, or attend industry events.

**26%**  
lead-to-opportunity  
conversion by

(Source: eMarketer. 2024)

This subtle reinforcement builds recognition and trust over time. According to eMarketer's 2024 study, retargeting increases lead-to-opportunity conversion rates by 26%. By staying visible across channels, your brand remains top of mind as executives move through their decision process. It's not aggressive marketing — it's intelligent, consistent repetition that makes your presence feel omnipresent yet natural.

# Inside Track: Your Advantage with Sam.ai

C-suite outreach in commercial real estate is all about insight and timing — and that's where Sam.ai truly stands apart. Of the nine proven strategies in this playbook, six can be put into action immediately using Sam.ai's pioneering Agentic AI, designed to help top producers and firms unlock their full potential and win more meaningful deals.

## 01 C-Suite Outreach & Ideal Client Persona

Sam.ai ICP Builder defines your Ideal Client Persona and pinpoints your best-fit markets — identifying up to 90% of total addressable contacts through precision filters and AI-driven data enrichment.

## 02 Warm Introductions & Referrals

The Sam.ai Intro Generator uncovers mutual connections, recommends introductions, and automates referral follow-ups to grow trust and influence organically.

## 03 Thought Leadership Roundtables

With Sam.ai Roundtable AI, you can host seamless AI-managed events that handle invites, insights, reminders, and post-event nurturing — positioning you as an industry thought leader.

## 04 Personalized Email Outreach (at scale)

Sam.ai Email Co-Pilot creates hyper-personalized, trend-aware messages and powers precision appointment-setting campaigns with optimized engagement algorithms.

## 05 High-Intent Data Outreach

Sam.ai Intent Engine integrates live intent signals like funding rounds, expansions, and property activity — helping you reach decision-makers at the perfect moment.

## 06 Account-Based Marketing (ABM)

The Sam.ai Playbook Engine automates tailored multi-channel ABM campaigns, tracking engagement and refining strategy for continuous improvement.