



Claude Connectors for CRE Brokers

Linking Claude to the tools brokers already use:

Connectors link Claude to the tools you already use. Attach them through the + sign in the chat. Once a connector is on, Claude can pull contacts, emails, and deal data right into your conversation so you're not copying and pasting between tabs. **Manage each connector's permissions** so it can't delete anything in your systems.

The Big Three

Connector	What it does for a broker
ZoomInfo	Prospecting. Pull company info, decision makers, and contact details for tenants and owners, then have Claude build a call list or draft outreach.
Outlook (M365)	Email and calendar. Claude can find a thread, summarize what a client said, draft follow ups, and check your schedule. It also reaches OneDrive, SharePoint, and Teams.
Salesforce	Your CRM. Look up accounts and deal history, log activity, and get a quick read on your pipeline without clicking through record after record.

Heads up on Outlook: at most brokerages your email runs through the firm's Microsoft 365 account, so the connector will most likely need to be **approved by the brokerage's IT team** before you can turn it on. Ask IT early so you're not waiting on it later.

What About CoStar?

There is **no CoStar connector with Claude**. CoStar keeps its data locked inside its own platform, so Claude can't log in and pull comps or availabilities for you. The workaround: export the report from CoStar to Excel or PDF, then attach the file to your chat or project and let Claude do the analysis from there. Make sure your exports stay within your firm's CoStar license terms.

Other Connectors Worth Adding

Connector	Why it's useful
DocuSign	Track where LOIs, listing agreements, and leases are in the signing process and pull key terms from completed documents.
HubSpot	If your team uses HubSpot instead of Salesforce, it does the same CRM job: contacts, deals, and email campaigns.
Google Workspace	Gmail, Calendar, and Drive. For teams not on Microsoft.
Box	Many brokerages keep OMs, flyers, and leases in Box. Claude can search and read them without downloading. Check with IT first.
Canva	Marketing materials. Have Claude create or edit flyers, listing brochures, and social posts in Canva, then fine tune the design yourself.

Quick tip: start with one. Turn on the connector you live in the most (usually email or your CRM), use it for a week, then add the next. Same rule as Outlook applies to anything tied to your firm's accounts: check with IT first.