



# WAV GROUP SPECIAL REPORT

**Clareity26: How industry leaders  
are approaching a market in  
transition**



Clareity26 Workshop brought together more than 240 MLS executives, brokers, and industry leaders in Tucson to discuss how the industry is navigating one of its most pivotal moments. Held March 16-18 at the JW Marriott Starr Pass Resort and hosted by Cotality, this year's event centered on a clear theme: pivot with a purpose.

From shifting business models and legal pressure to AI adoption and rising cybersecurity risks, the conversations throughout the event reflected an industry adjusting in real time. At the same time, attendees were also looking ahead, sharing strategies, challenges, and opportunities for shaping what comes next.

Clareity26 also marked the end of an era. It was announced that this would be the final Clareity Workshop after a 24-year run, with Cotality continuing its support of the industry as a Platinum sponsor of MLS Reset, a new event designed to carry forward the collaborative spirit of Clareity.

As always, no recap can fully capture the value of the conversations and connections that happen throughout the event. What follows are key insights and takeaways from this year's sessions.



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## Day 1 - Opening session: A call to "Pivot with Purpose"

Kevin Greene, SVP and General Manager of Real Estate Solutions at Cotality, opened Clareity26 by emphasizing both the strength of the MLS model and the pressures shaping its future. He noted that while the industry continues to evolve rapidly, the MLS remains a critical foundation for transparency and cooperation.

Kevin emphasized the need for leaders across the industry to work together, engage in open dialogue, and respond to change with purpose rather than reaction.

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### Key Quote

"We provide a marketplace that is the envy of the world."

- Kevin Greene

### 3 key takeaways:

- 1. The MLS continues to serve as a foundational marketplace**, even as new business models and competitive pressures emerge.
- 2. The pace of change is accelerating**, requiring faster, more coordinated responses across the industry.
- 3. Collaboration across roles and organizations** remains essential to maintaining and evolving the marketplace.

## The latest in tech: AI, robotics, and what's already here

Gregg Larson, founder of Clareity, returned with his always-anticipated opening session, sharing highlights from the Consumer Electronics Show (CES). Gregg offered a forward-looking view of the technologies shaping both real estate and the broader economy. His presentation emphasized that many of the trends discussed in previous years are no longer theoretical - they are already being deployed at scale.

What stood out most in Larson's session was the pervasiveness of AI. From household devices to industrial robotics, AI is now embedded across nearly every category of technology, alongside rapid advancements in robotics, autonomous systems, and AI-driven infrastructure already being implemented across multiple industries.

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### Key Quote

"AI is here. It's in everything."

- Gregg Larson



### 3 key takeaways:

- 1. AI is now embedded across nearly every product category**, moving from concept to widespread, real-world implementation.
- 2. Robotics and physical AI are advancing rapidly**, with machines increasingly capable of performing complex, human-like tasks in both industrial and consumer environments.
- 3. Autonomous systems, digital twins, and AI-driven infrastructure** are reshaping industries beyond real estate, with implications for how work gets done and how services are delivered.

## Legal update: What's changing and what's coming next

Following the opening technology session was the legal update, led by Mitch Skinner of Larson Skinner PLLC and Claude Szyfer of Hogan Lovells. Once again, these legal leaders drew strong interest as attendees looked for insight into our industry's rapidly changing legal landscape.

The session provided a comprehensive overview of ongoing litigation, including the Compass lawsuits, the status of the NAR settlement, and new emerging legal risks facing MLSs and associations. The discussion that followed reinforced the complexity of the current environment, with questions from attendees highlighting concerns around listing transparency, governance structures, and the balance between innovation and compliance.

Across both the presentation and open discussion, one theme remained clear: while many legal questions are still unresolved, the level of scrutiny across the industry is increasing, and organizations must be proactive in evaluating their policies, structure, and long-term strategy.

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### Key Quote

"We need to be thinking about how we evolve as an industry."

- Claude Szyfer

### 3 key takeaways:

- 1. Litigation around listing access, buyer-based class actions, and MLS participation is ongoing**, with key cases still unfolding and new issues such as the impact of AI being likely to shape future industry practices. Legal risk to MLSs and Brokers for future litigation are significant.
- 2. MLSs and associations are reassessing governance structures and policies**, with increased focus on risk mitigation and potential structural change. OpenMLS is a keynote of that.
- 3. State-level legislation and industry pressure** are driving greater emphasis on transparency, particularly around listings and consumer access to information. Some states require brokers to contribute listings to the MLS - Washington State and Wisconsin.



## Inside the brokerage mindset: What MLSs need to understand now

Following the legal update, the conversation shifted from external pressures to internal alignment, with a session focused on how brokers are thinking about MLS value, data, and day-to-day operations. Jim Adams of Long Realty, joined by Victor Lund of WAV Group, provided a practical view from inside the brokerage, highlighting how MLS decisions translate into real-world impact for agents, staff, and technology teams.

Based on experience from both the MLS and brokerage sides, Adams emphasized that while the industry continues to evolve, many of the biggest challenges come down to execution. From managing multiple MLS data feeds to supporting agents with increasingly complex tools, the discussion underscored the importance of communication, flexibility, and alignment between MLSs and their broker customers.

### Key Quote

"There are a lot of changes being made in MLS that will dramatically impact a broker." "It would be nice to get an early heads up so we can plan our implementation of the change."

- Jim Adams

### 3 key takeaways:

- 1. Communication remains a crucial gap,** particularly in ensuring MLS changes are clearly understood by brokers, staff, and agents who are often overwhelmed with information. Be sure that your email is reaching the right people at the brokerage who may not be subscribers or members.
- 2. MLS decisions around data, standards, and timing** can have significant operational impact on brokerages, especially those working across multiple MLSs and systems.
- 3. There is growing need for MLSs to rethink services, pricing structures, and data policies** to better align data services with how brokers actually operate and deliver value to their agents.



## Economic update: Signals pointing to a gradual recovery

Following the brokerage discussion, Selma Hepp, Chief Economist at Cotality, provided a data-driven look at the broader economic and housing market outlook. Her session reinforced the complexity of the current environment, noting that while many fundamentals remain intact, external factors continue to introduce uncertainty into both economic growth and housing activity.

Despite volatility driven by global events, interest rates, and policy shifts, Hepp noted that the housing market continues to show signs of gradual improvement. Inventory is rising, affordability has modestly improved, and pent-up demand remains strong, even as market conditions vary significantly by geography, income level, and local job growth.

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### Key Quote

"It's hard to do this job of predicting the future."

- Selma Hepp

### 3 key takeaways:

- 1. The housing market is expected to improve gradually**, supported by strong underlying demand, increasing inventory, and stabilizing price growth.
- 2. Economic uncertainty remains a key factor**, with global events, inflation, and interest rate volatility continuing to influence mortgage rates and consumer sentiment.
- 3. Market conditions are increasingly uneven**, with higher-income households and certain regions driving activity, while affordability challenges persist for many buyers.



## The broker-MLS relationship: Evolving expectations and accountability

After the brokerage-focused session, the conversation shifted into a deeper examination of the broker-MLS relationship, revisiting a dialogue that began more than a decade ago. Craig Cheatham of The Realty Alliance, Phil Soper of Royal LePage, and moderator Gregg Larson reflected on how many long-standing broker concerns, including transparency, data access, and cooperation, remain relevant today, even as the industry faces new pressures from technology, AI, and shifting business models.

The live perspective shared by these industry leaders was augmented with a candid video from real estate brokerage executive Casey Bryan, the dynamic President of BHHS Florida Properties Group. Casey poignantly highlighted the ongoing frustrations around rule enforcement, governance, and alignment. While the tone emphasized collaboration rather than conflict, the discussion made clear that expectations are rising. MLSs are increasingly being asked to modernize their approach, strengthen relationships with brokers, and ensure that policies, pricing, and data practices reflect the realities of today's marketplace.

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### Key Quote

"Get out of your seats at (your) MLS headquarters and go out and meet your large brokers."

- Craig Cheatham



### 3 key takeaways:

- 1. Many broker concerns raised more than a decade ago remain unresolved**, particularly around transparency, enforcement, and alignment with brokerage needs. Many MLSs have derailed the core mission of being a data services company to brokers.
- 2. MLSs are being challenged to modernize governance**, improve communication, and ensure policies are consistently enforced across participants.
- 3. While the relationship remains collaborative**, increasing expectations around data access, flexibility, and accountability are driving renewed focus on what MLSs deliver to brokerages.

## Breaking news session: Keller Williams, Zillow, and the future of listing exposure

In a last-minute addition reflecting an announcement made that morning, the conversation shifted to a live discussion via Zoom about a newly announced partnership between Keller Williams and Zillow. Chris Czarnecki, CEO and President of Keller Williams, joined via Zoom alongside Jason Abrams, Head of Industry and Learning at KW, to outline the company's perspective on a new listings "Preview" program they were launching with Zillow.

Their focus was on how listings are marketed before entering the MLS in the new KW-Zillow program. They covered listing transparency, consumer access, and evolving marketing strategies as well as the growing debate around private networks, cooperation, and access.

Both executives maintained that the new "Preview" program introduces an optional pre-marketing phase designed to expand exposure, while maintaining alignment with MLS rules. Zillow's role in the partnership was positioned as an extension of that strategy, with both organizations reinforcing the importance of a transparent, open marketplace. The session also highlighted increasing pressure on MLSs to enforce rules consistently as new models emerge.

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### Key Quote

"Consumers deserve transparency. Sellers deserve the ability to choose how their homes are marketed. Buyers deserve fair access to the entire market."

- Chris Czarnecki

### 3 key takeaways:

- 1. Keller Williams introduced an optional pre-marketing strategy** aimed at increasing early exposure for listings before they enter the MLS.
- 2. Transparency and broad access to listings remain central themes**, with continued support for an open marketplace.
- 3. KW maintained that inconsistent enforcement of MLS rules** is contributing to the development of new strategies and partnerships across the industry.



## Zillow perspective: Expanding access while reinforcing transparency

Following the live Zoom discussion with Keller Williams executives, Errol Samuelson, Zillow's Chief Industry Development Officer, carefully took the stage (recovering from a broken ankle) to provide additional context on the newly announced program and its broader implications. His remarks reinforced Zillow's position that the strength of the U.S. housing market is rooted in transparency, cooperation, and broad access to listings.

He explained that Zillow's new "Preview" program is designed to expand visibility for listings before they enter the MLS, while remaining aligned with MLS rules. Rather than restricting access, the goal is to make pre-market listings widely available to consumers and agents, avoiding the use of gated or exclusive networks. He also noted that inconsistent practices across the industry, particularly around private listings, are contributing to fragmentation and creating challenges for both buyers and sellers.

### Key Quote

"The program that we announced this morning is about enabling all buyers, all consumers, to see listings before they go into the MLS."

- Errol Samuelson



### 3 key takeaways:

- 1. Zillow's Preview program is intended to expand access to listings before they enter the MLS,** making them visible to all consumers without restrictions.
- 2. Maintaining a transparent and open marketplace remains a central priority,** with continued support for MLS rules and cooperation.
- 3. The rise of private listing networks and gated access** is viewed as a potential threat to the MLS, as it causes listings to be created and distributed with no entry into the MLS.

## Cybersecurity keynote: One click is all it takes

Following lunch, the tone shifted sharply as cybersecurity expert FC Barker, known as "Freakyclown," delivered a live demonstration on how easily organizations can be compromised. Drawing on decades of experience in ethical hacking, Barker walked through real-world attack scenarios, showing how hackers gain access not through complex systems, but through simple human error.

The most memorable moment came during a live demo that illustrated how a single click on a phishing email can give a hacker immediate access to an entire network. From there, attackers can move laterally, access sensitive systems, and operate undetected. The message was clear: while sophisticated threats exist, the most common and effective attacks still rely on exploiting people, not technology.

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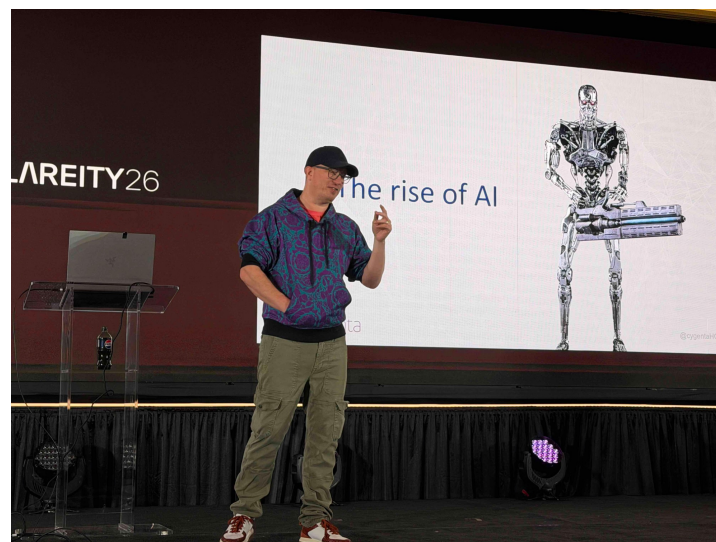
### Key Quote

"If a communication is unexpected, makes you feel something, or asks you to do something... read it out loud."

- Freakyclown

### 3 key takeaways:

- 1. The most common cybersecurity breaches start with a single action**, typically one person clicking a malicious link.
- 2. Hackers do not need to break into systems** - it's much more difficult. It's easier to target a person in your organization to gain access to your systems and cause havoc.
- 3. Once access is gained, attackers can quickly move across systems**, making early detection and employee awareness vital.



## Security discussion: Turning awareness into action

Following the cybersecurity keynote, an open discussion moderated by Dave Hamilton, Head of AI for Cotality, brought together Freakyclovn, Liz Sturrock of MIAMI Realtors, and Chris Lambrou of Metro MLS to translate the demonstration into practical steps organizations can take. The conversation reinforced that while threats are becoming more sophisticated, many of the most effective defenses remain rooted in fundamentals such as training, verification, and consistent internal processes.

One point came through clearly: human behavior continues to be the weakest link, regardless of how much technology is deployed. From social engineering attacks to fraudulent listings and vendor vulnerabilities, the discussion highlighted that security is no longer just an IT issue, it is an organizational responsibility. Education, policy, and accountability were repeatedly cited as essential components in reducing risk and improving resilience.

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### Key Quote

"If you are not training your staff... it's on you."

- Chris Lambrou



### 3 key takeaways:

- 1. Cybersecurity training is critical**, as human error and social engineering remain the most common points of failure.
- 2. Strong foundational practices**, including verification processes, password management, and system updates, are often more effective than complex tools alone.
- 3. Vendor relationships, data access, and internal policies must be actively managed**, as risks extend beyond internal systems to the broader ecosystem.

## Tech stacks of top MLSs: Evaluating scale, choice, and future readiness

The focus moved to technology strategy with Kelly Robinson of Cotality introducing Matt Cohen of Cotality (and cofounder of Clareity). Matt presented proprietary research on how the top MLSs are building and evolving their tech stacks. His analysis of the 100 largest MLSs highlighted a wide range in adoption, with larger organizations offering significantly more tools and data categories, reinforcing the growing importance of scale and strategic investment in technology.

Another key point emphasized was the need for MLSs to continuously evaluate their technology roadmap, particularly as new categories such as AI, automation, and advanced data tools emerge. Kelly then spoke with Matt Fowler of Doorify MLS. Matt added a practical perspective, sharing how his organization has prioritized flexibility, choice, and internal development, including offering multiple MLS platforms and building proprietary data infrastructure to better serve members and adapt quickly to change.

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### Key Quote

"MLSs are only going to become more competitive as consolidation continues, and technology is a significant part of that."

- Matt Cohen

### 3 key takeaways:

- 1. Technology stacks vary widely across MLSs**, with larger organizations typically offering more tools, data, and integrated services.
- 2. Ongoing evaluation of the tech stack is critical**, as new technologies and data capabilities continue to reshape what MLSs need to provide.
- 3. Flexibility, including offering multiple platforms and investing in internal development**, is becoming a competitive advantage.



## Pivoting with purpose: A real-time look at where leaders agree, and don't

Taking a different approach from traditional panels, this session brought together Kim Everett of WARDEX, Daniel Jones of Hive MLS, Tricia Thomas of Bay East Association of REALTORS, Mike Lake of Big Sky Country MLS, and Richard Renton of Triad MLS, with Greg Robertson serving as the host in a fast-paced, game show-style exchange. Greg guided both the panelists and the audience through a series of forward-looking scenarios. Using red and green cards to signal disagreement or agreement, MLS leaders weighed in on topics ranging from AI-driven open houses to data licensing and governance, often revealing a split room and, at times, participants holding up both cards.

The panel's consensus: there is no single path forward. On nearly every scenario, opinions varied widely based on market size, organizational structure, and leadership perspective. Rather than consensus, the session surfaced the real value of Clarity: Giving leaders the opportunity to test ideas, challenge assumptions, and better understand how peers across the industry are thinking about what comes next.

### Key Quote

"It's real estate... we'll try everything."

- Greg Robertson

### 3 key takeaways:

- 1. MLS leaders are approaching AI, data access, and governance from very different perspectives, with no clear consensus on many emerging issues.**
- 2. The pace of change is forcing organizations to evaluate decisions more quickly, even when the long-term implications are still unclear.**
- 3. Open dialogue and peer exchange remain critical, as leaders look to balance innovation with responsibility in a rapidly evolving environment.**



## Becoming an industry of yes: Embracing AI while managing risk

The AI panel that followed brought together Ninve James of the Real Estate Board of New York, John DiMichele of the Toronto Regional Real Estate Board, and Kevin Hawkins of WAV Group (aka real estate "REAL AI Guy"), moderated by David Hamilton, head of AI at Cotality. Their conversation shifted from possibility to responsibility, focusing on how organizations can move from hesitation to action when it comes to artificial intelligence. The discussion brought together perspectives from MLSs, associations, and brokerage leadership, reinforcing that while AI adoption is accelerating, many organizations are still working to define the right approach.

The panel dove into the tension between innovation and risk. Panelists emphasized that agents are already using AI tools, often without oversight, creating what was described as "shadow AI" across organizations. Rather than attempting to restrict usage, the group highlighted the importance of education, policy, and trusted solutions to guide adoption. The path forward is about saying yes in ways that enable responsible use of AI at scale.

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### Key Quote

"The greatest risk to us all is not adapting and using (AI)."

- John DiMichele

### 3 key takeaways:

- 1. AI adoption is already happening at the agent level, often without visibility**, making governance and education a priority for MLSs and associations.
- 2. Training and clear policies are essential to reduce risk**, particularly around data security, intellectual property, and responsible use.
- 3. Organizations that successfully embrace AI as a tool for efficiency and support** will outperform those that delay adoption.



## Day 2 - Agent sentiment survey: Stability, uncertainty, and shifting priorities

Kicking off the second day, Lance Lambert of ResiClub, a housing market research platform, presented new survey data capturing how agents and brokers are navigating today's market conditions. Drawing from more than 200 industry respondents, the session provided a snapshot of sentiment around commissions, consolidation, private listing networks, and the growing role of AI.

The data points to a market that is more stable than headlines might suggest, but still facing meaningful structural shifts. While transaction volume remains historically constrained, most agents surveyed plan to stay in the industry long term, and commission pressure appears more nuanced than widely reported. At the same time, private listing networks remain controversial, consolidation continues to shape the landscape, and AI adoption is accelerating rapidly across agent workflows.

### Key Quote

"Those who are willing to adopt (AI early)... are usually the ones who benefit the most."

- Lance Lambert



### 3 key takeaways:

- 1. Despite market challenges, agent commitment remains strong**, with the vast majority planning to stay in the industry for the next several years.
- 2. Commission pressure exists but is not universal**, with most agents reporting no meaningful change since recent industry developments.
- 3. AI adoption is accelerating quickly**, with a majority of agents expecting to use AI daily, even as other industry changes, including the rapid emergence of private listing networks, remain divisive.

## Private listings: From policy debate to operational reality

Building on the sentiment data, this session brought together Clint Skutchan of T3 Sixty, Melissa King of OneKey MLS, Stan Martin of Unlock MLS, and Chris Haran of MRED, to examine how MLSs are actively adapting to the rise of private listings and pre-marketing strategies. Panelists shared real-world approaches, emphasizing how MLSs are addressing this shift through new rules, product changes, and closer collaboration with brokers.

Across the discussion, there was one point that came up repeatedly: flexibility is essential, perhaps now more than ever. Rather than resisting change, MLSs are developing frameworks, such as "flex listings," private listing options, and clearer exposure controls, to meet broker needs while still encouraging participation and cooperation. The goal is not to eliminate alternative strategies, but to ensure listings ultimately flow back into the MLS, preserving data integrity and market transparency.

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### Key Quote

"We have to go back to who our customer is... and our customer is the broker and the agent."

- Chris Haran

### 3 key takeaways:

- 1. Private listings are no longer a policy debate.** They are an operational reality that MLSs must address through practical solutions.
- 2. Flexibility in listing options is helping MLSs retain participation** and encouraging listings to enter our cooperative marketplace.
- 3. Maintaining the MLS as the central source of truth** requires balancing broker choice with incentives for cooperation and data contribution.



## Succession planning: Preparing for leadership transitions before they happen

Continuing the focus on operational leadership, this session brought together Justin Haag of Northwest MLS, Dave Howe of MetroList, and Shayne Fairley of Stellar MLS, to share real-world experiences navigating CEO succession. The discussion moved beyond theory, offering practical insight into how organizations can plan for leadership transitions while maintaining stability, continuity, and confidence across staff and stakeholders.

What stood out from the conversation was the importance of intentional planning. Whether transitions are anticipated or unexpected, panelists emphasized that succession should be treated as a structured process, not a one-time event. From preparing internal candidates and documenting institutional knowledge to aligning with boards and communicating clearly with staff, the session highlighted that successful transitions depend on preparation, transparency, and leadership development at all levels of the organization.

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### Key Quote

"Treat it like a project."

- Shayne Fairley

### 3 key takeaways:

- 1. Succession planning should be proactive and ongoing, not reactive**, with clear timelines, roles, and contingency plans in place.
- 2. Developing internal talent and documenting institutional knowledge** are critical to ensuring continuity during leadership transitions.
- 3. Communication with staff and stakeholders is essential** to maintaining confidence and avoiding disruption during periods of change.



## Empowering members: Driving adoption, productivity, and growth

Closing out the workshop, Kevin Greene of Cotality moderated a forward-looking discussion with Matt Fagioli of Growth Agents and Matt Fowler of Doorify MLS on how MLSs can better support their members through coaching, education, and smarter use of existing tools. The session focused on a growing challenge across the industry: not just delivering technology, but ensuring agents understand and use it effectively to grow their business.

Panelists pointed out that the gap between available tools and actual usage remains significant. Many agents are underutilizing the platforms and capabilities already provided by their MLS. From large-scale coaching programs and AI education to targeted engagement strategies and in-app guidance, the discussion highlighted the need for MLSs to take a more active role in driving AI adoption and education. As AI continues to reshape workflows, the ability to teach, guide, and elevate members is becoming a crucial differentiator.

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### Key Quote

"Real estate agents will still exist in 2045... but only the ones who evolve."

- Matt Fagioli

### 3 key takeaways:

- 1. Providing tools is no longer enough;** MLSs must actively drive adoption through education, coaching, and targeted engagement.
- 2. AI is accelerating the need for training,** with agents who embrace and apply these tools gaining a clear competitive advantage.
- 3. Understanding member behavior and usage patterns** enables MLSs to deliver more relevant support and improve overall productivity.



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## Final thoughts: Pivoting with purpose

Clareity26 underscored this: the industry is not standing still. From AI and cybersecurity to private listings, governance, and leadership, the pace of change is accelerating across every part of the ecosystem.

What stood out most was not just the challenges, but the willingness of leaders to engage, adapt, and share openly with one another. As Clareity closes its final chapter after nearly a quarter of a century, that collaborative spirit remains firmly intact, continuing through industry events, conversations, and initiatives that will shape what comes next.

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**The next chapter continues at [MLS Reset, February 22-24, 2027, in Scottsdale, Arizona.](#)**