

INDUSTRY

Real Estate

Customer is a global alternative asset owner, committed to making strategic investments in high-growth opportunities that support the development of a sustainable global economy.

With a total portfolio value of \$18 billion and investments across Real Estate, the core of our approach is creating outstanding value.

Value Creation Modules

Financial Institutions, Customers and Investors

Unified view, New Customer and Investor Onboarding

Performance Management

Asset Team, Capital Team & Investment Team, Role-based Access and Dashboards

Intelligent Reporting

and MIS

Visit Planning & Execution

Planned and Ad-Hoc Visit Execution, Geolocation Tracking

Integrations

OSIT System for Property Sync Salesforce Inbox

Personas



- Asset Management Team
- Investment Management Team
- Capital Management Team
- RMZ Management Team

Products & Technologies Used



sales cloud



Digital Engagement

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CHALLENGES

- No view of customer unified data across different business vertical.
- Duplicity of customer accounts and contacts causing manual errors.
- No tracking of the visit of customers, banking institutions and investors
- Separate incident management by different teams for same customer
- No unified approval tracking of the Capital Management
- No view of customer unified data for different property.
- Multiple channels to track communication with the customer

- Unified view of customers across sales by creating a customer 360-degree view
- Duplicate rules are created in the system to maintain the data sanity
- A complete Visit management system is created to track the formal and informal visits and, tracking the next actions regarding it

- A single system will be used by all the teams to track Assets Management, Inventory Management, Capital Management and Invest Management
- An approval is created in the system for onboarding of financial institutions are a property
- Salesforce Inbox is used to utilize Outlook Emails in Salesforce



SOLUTION



BENEFITS

- Streamlined SPANCO process with higher conversion rate.
- Reduction in Average handling time and increased customer satisfaction.
- Single source of truth for the teams by virtue of real time integrations.
- Better control over business by virtue of holistic real time reports and dashboards for business owners.
- Operational efficiencies by virtue of real time and data backed collaboration across the teams.