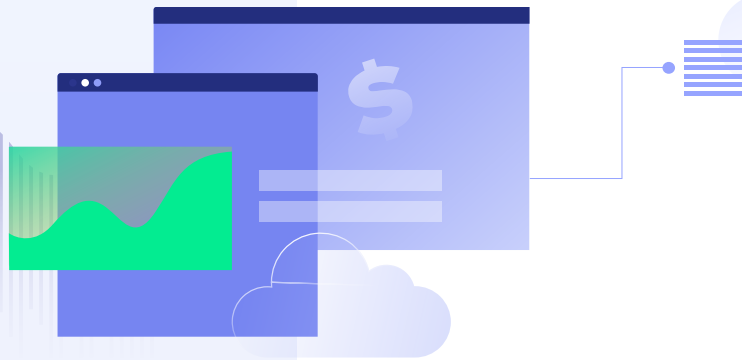# RE-ENERGIZING A PROPERTY GROUP'S IT RESOURCES FOR FUTURE GROWTH

softserve

SUBOPTIMAL INTEGRATION

When a leading property and finance group recognized that rising costs and fragmented internal communications were a result of outdated and dysfunctional IT systems, it realized it was time to modernize.

After over 30 years of building an integrated property development and management business — through a combination of organic expansion and acquisitions into a group with over $17 billion in assets under management — the role of technology had transitioned from a facilitator to a potential obstacle.

The provision of property management services required a wide range of IT products to run the business and ensure a bespoke, fast, and easily accessible customer experience. These included engaging with investors and clients and the acquisition, sale, and lease of property. It also entailed property management, data research, accounting, HR, and other services.

Expansion meant that although it was now operating over 30 different applications, many activities were still manual, particularly its help desk, accounts payable, work order management, and data research. This compromised productivity, as many solutions had limited scalability. They were not optimally integrated and were developed on different, often incompatible, technologies.

This suboptimal integration not only hindered internal collaboration, effective governance, and decision-making but was forcing costs higher and limiting potential growth.

Software maintenance costs were rising, as it was paying different third parties to host applications and had to engage many external IT experts to have access to knowledge of different technologies. This also meant challenges in establishing effective DevOps procedures to keep pace with growing software development requests as operations grew and diversified.

LIMITED SCALABILITY

This large number of existing solutions not only covered separate processes and departments but had limited scalability. This led to weak connectivity between different departments, suboptimal governance, and higher overheads.

Our client therefore decided to focus on several key objectives including:

Easy scalability of its IT solutions to support expansion.	Optimized software maintenance costs.	Stronger governance models.	Integration of department operations into one solution to increase transparency.
Automation of manual operations within accounts payable, work order management, client help-desk processes, data research, and collection.	Improved customer experience by cutting response time to customer requests.		Improved DevOps practice to ensure smooth and effective solutions development.

After exploring the most suitably qualified IT solutions providers to resolve these challenges, it asked SoftServe to propose how it could migrate applications onto one platform, automate operations, and build a single company-wide operational process. This would reduce costs, simplify internal communications, provide better oversight, enhance governance, and improve decision-making.

RIGOROUS ASSESSMENT

After a rigorous assessment, SoftServe recommended a digital transformation program, with a migration of many proprietary products to the Salesforce platform.

These included moving applications from declining platforms and outdated legacy systems and setting up workflows of existing products within Salesforce. The next step was data migration from existing products to Salesforce, the development of workflows for non-automated processes, and the integration of workflows of different departments into a unified internal process.

SoftServe also undertook projects to develop websites and mobile applications for engaging with customers. It then automated mechanisms for collecting data from external sources, developed a machine learning (ML) model for real-time estimation of purchasing power limits, and established a more efficient DevOps process.

To deliver the project, SoftServe used an FSI delivery team of over 30 engineers and other experts to work with the client's technology product management department. They also worked with the program and project management teams and various engineering, enterprise architecture, and security personnel.

REAL-TIME COLLABORATION

From a technical perspective, it was decided to start by replacing the client's proprietary work order management process with Salesforce's off-the-shelf Field Service Lightning (FSL) — an onsite platform that enabled real-time collaboration to deliver automatic scheduling and schedule optimization.

This increased productivity by lifting the number of processed work orders, cutting time-consuming manual work, raising productivity per dispatcher and internal technician, and improving first-visit resolution and onsite job management. It then introduced a mobile solution to deliver real-time collaboration with access to job schedules, van inventory, knowledge articles, and more.

The improved transparency of the order management process, with more performance indicators that revealed service bottlenecks, made them more manageable and predictable.

COMMUNICATION CHANNELS

The next step was to replace the existing communication channel between residents and the client with a web client-facing resource, developed based on Salesforce Community Cloud. This accelerated the ability to report issues and request maintenance services. It also improved the scalability of the work order management system, enabled full functionality of Salesforce FSL, and offered much easier use for the residents.

Together these ensured scalability, higher productivity of work order management, and improved customer satisfaction through the increased service speeds and feedback loop provided by the scalable and flexible Salesforce FSL solution.
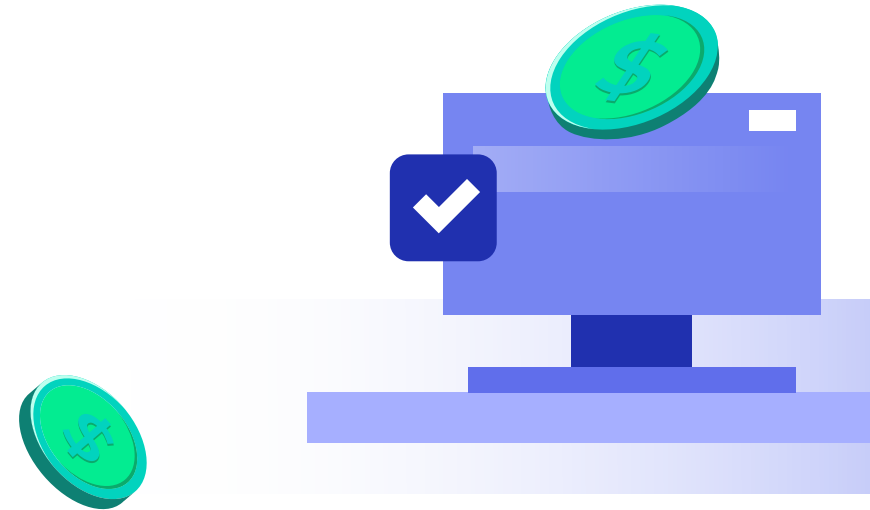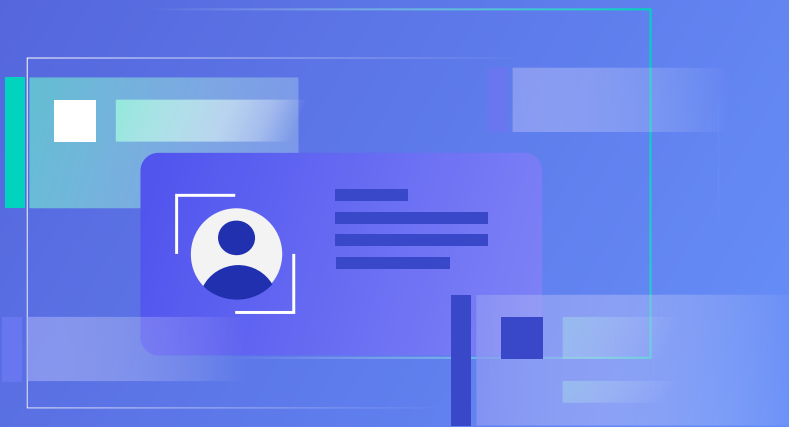
AUTOMATION AND INTEGRATION

The firm's accounts payable process was managed via another proprietary product that had limited scalability and did not cover all activities. Some subprocesses remained manual such as payable data manipulation in Excel, the download of transactions from the bank's web portal, payment reconciliations, and several other validation steps.

To achieve the required qualitative change, it was decided to again use the power of Salesforce and its FSL together with Financial Force as a target solution. This enhanced the scalability of operations, increased productivity, and reduced the risk of human mistakes by the automation of time-consuming manual activity. It also ensured the integration of accounts payable processes with other company processes and increased transparency of accounting data.

EFFECTIVE MANAGEMENT

At the same time, data was migrated from a separate CRM solution used to communicate with investors. The workflows of investors' service analysts and managers were created in Salesforce on a portal for investors to have timely access to investment performance information.

Within this portal, functionality was implemented for investment service analysts to be able to manage investors' accounts and provide accurate and timely portfolio performance reports on the agreed cadence to investor groups in the predefined format. This also maintained up-to-date logs of investor interactions and activities such as calls, emails, and meetings. It properly logged all investor activity in the CRM and built dashboards with a regularly maintained database of prospects and investors.

This provided senior management with an overall monitoring of the investment management process. For external users, it offered the ability to effectively manage their investment in the company by having access to validated performance and investment data regularly.

This ensured the reliability of the CRM system by hosting on a more recognizable platform. It also cut costs by reducing third-party CRMs and by not having to pay a third-party CRM (Backstop) subscription.

The client's platforms for providing services to customers — in particular, the acquisition/sale and lease of property deals — were upgraded to support teams with better access, continuous integration and delivery, server configuration, infrastructure, monitoring, and alerting requests. DevOps processes were improved by standardizing, updating, expanding, and simplifying existing processes, and maintaining and updating the tools used.

Debugging and troubleshooting issues related to all stages of DevOps increased productivity by simplifying the implementation of new platform developments/tools and improving the DevOps process. This strengthened the reliability and security of the platform by improving access and security issues.
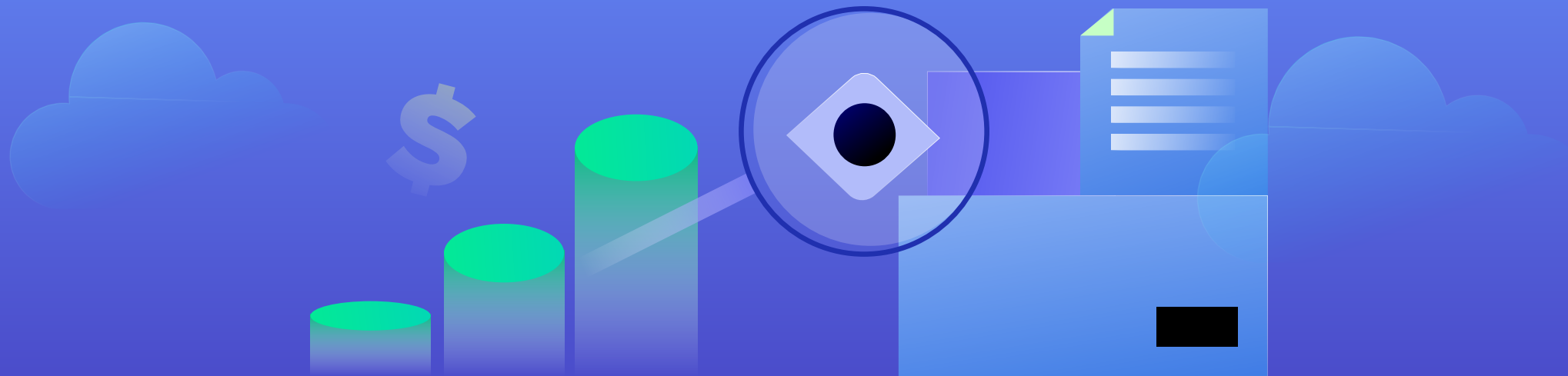
PRODUCTIVITY INCREASE

The project then automated the collection of data about property available for sale from third parties, previously manually collected and captured in a proprietary database. This increased productivity by ending former manual operations and ensured a higher acquisition success rate by simplifying data collection and reducing the risk of missing valuable deals.

The **net result** of these projects enabled the client to **cut the diversity of IT applications** used in day-to-day operations by **50%** and i**ncrease the velocity of property acquisition deals** by **25%**. It also **launched two new customer brands**, with accompanying websites and mobile applications.

The introduction of an ML model into the process enabled a more accurate calculation of buying power liabilities to further maximize resources.

The client enhanced its governance model by establishing a unified operational process, which also increased transparency and collaboration between departments, and improved its DevOps process.

Productivity was significantly enhanced by automating operations previously done manually and the enhancement of a scalable-IT solution that is now able to support a growing number of operations with no need for additional personnel.

READY FOR THE FUTURE

The net result means the client is now ready for the future. It is an efficient, vertically integrated property management, investment, and development group. It can deploy smart technology to deliver its deep-rooted expertise in a sophisticated, agile, and collaborative manner.

This client is now able to showcase the innovative solutions that it needs to disrupt the property ecosystem and unlock long-term value for the investors, residents, and communities it serves.

About SoftServe

We are advisors, engineers, and designers who deliver innovation, quality, and speed — elevating and accelerating our clients' digital journeys.

Our approach is built on a foundation of empathetic, human-focused experience design that ensures value and continuity from concept to release.

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