



Sage SalesLogix | Customer Success

Challenge

Entry-level CRM solution lacked reporting, automation, mobility, and accessibility required by CORE Realty Holdings, LLC.

Solution

Sage SalesLogix, Sage SalesLogix Visual Analyzer, and Sage SalesLogix Mobile team-up to offer CORE all the functionality required of a realty company that buys, sells, and manages commercial and multi-family real estate.

Results

CORE now has all records in one database. Outside agents have instant 24-hour access to the solution on their mobile devices. Reporting is preformatted and automated—providing data in a visual format that is easy to read. The company no longer needs a 40-hr/week Crystal Report developer.

CUSTOMER:

CORE Realty Holdings, LLC

INDUSTRY:

Real Estate

LOCATION:

Newport Beach, CA

DATABASE:

50,000

NUMBER OF LOCATIONS:

1

NUMBER OF USERS:

40

SOLUTIONS:

Sage SalesLogix

Sage SalesLogix Mobile

Sage SalesLogix Visual Analyzer

California Real Estate Company CRM Makeover Streamlines Operations

CORE Realty Holdings, LLC, of Newport Beach, CA and its affiliates own and professionally manage over 10.6 million square feet of commercial and multi-family real estate located throughout the United States for its owners and private investors. The organization exhibits real estate expertise in all phases of finance, development, acquisitions, asset and property management, and dispositions. They are not only major property owners with their own portfolio, but also realty advisors for investors seeking to maximize their cash-on-cash returns using experienced managers with a proven track record. With so many facets to the business, it is essential that every real estate transaction and its ornate details are readily available, and that the information provided therein is wielded with great accuracy. At the helm of this effort is Sage SalesLogix—a feature-rich CRM solution that provides insight into every area of the business at CORE.

For years CORE leaned on the reliability of an entry-level contact manager for all of their relationship management needs. The system was organized into three separate databases. There was one for investor relations, one for acquisitions, and one for broker/dealer actions. This worked great for each of those departments, but visibility across the business was nil. If an associate from one department needed information housed in one of the other databases and the information owner was out of the office, then they were stuck. As the business grew, it became apparent that a more robust system that could provide total vision and accessibility across departments was a necessity. Gary Davi, Chief Information Officer at CORE reflects on the situation, “We knew we needed a change, but there was an overriding concern that a new implementation at this stage would not be cost-effective or it would impede on the company’s immediate business needs.” Luckily Davi saw it differently. “As an IT professional I saw these perceptions to be a good challenge to overcome,” says Davi.

Make an Informed Decision

Davi decided to reach out to an authorized Sage SalesLogix business partner to begin the process of defining his company’s needs. “Before making a decision, I spoke with a few of their customers to get an idea of their process and methodology. All of their references had nothing but positive comments to relay. And, the great thing is that they are completely familiar with our business model and its intricacies,” says Davi. “Not only that, but they also had an industry-specific template that helped speed the process of the necessary data migration. So right off the bat they were dispelling one of our fears of a time-consuming implementation.”

“It is important for us that any solution we use operates exactly the way we do,” says Davi. “One of the reasons I was sold on Sage SalesLogix is that it is a highly customizable solution, and our business partner was able to make it work for us. Our Sage SalesLogix database is broken down into three main levels. The account level represents the Broker/Dealer community and is the highest level. Then there are two sub-levels below that—the registered representatives and then the investors. The real estate industry is very regulated with regards to property data and the people associated with the property, so we have specific security measures in place at each level. While the executives are able to access the information they need to run the business effectively, all other associates only have access to the information that they are supposed to.”

“It is important for us that any solution we use operates exactly the way we do. One of the reasons I was sold on Sage SalesLogix is that it is a highly customizable solution...”

Gary Davi

Chief Information Officer
CORE Realty Holdings, LLC

Streamline Your Business

Sage SalesLogix is much more than a feature-rich database; it helps CORE grow by streamlining the entire business. CORE uses the solution to track calls—with caller id embedded into the system—set appointments, create highly visual reports, and enable a mobile workforce.

“We’re really excited about Sage SalesLogix Mobile,” says Davi. “For one, the external wholesalers don’t have to lug their laptop around anymore. They all have the solution right on their hand-held devices. So today the internal staff can book appointments for the external wholesalers—complete with maps and driving directions—which the external wholesalers receive and view on their hand-held devices. In addition, the external wholesaler can now take notes or order literature from the home office while on the road. But, that’s not even the best part. The synching capabilities have proven most valuable. In the past, synching, or lack thereof, was a huge headache for management. We’d often run in to a situation where the external associate wouldn’t synch for days at a time—which in turn meant our internal reports were all wrong. It made it look as though work wasn’t being done. Today synching is being done as changes occur.”

Report with Accuracy and Confidence

CORE also uses Sage SalesLogix Visual Analyzer—a comprehensive, interactive business analytics tool that transforms Sage SalesLogix data into actionable information. “We needed something with a dashboard view because executive management needs a brief summary of where the business is at. They don’t have time to read a 50-line crystal report, nor can it be grasped in the amount of time they have,” says Davi. “Visual Analyzer gives us the ability to provide reports in a graphical and colorful presentation. It is classy and clean.”

Prior to Visual Analyzer, CORE used a full-time Crystal Report developer to create company reports. In addition, Davi himself was spending up to 8 hours per week creating what he called “emergency reports.” “We are a very scenario-centric organization,” says Davi. “Management wants to look at the data in a ton of different ways. There is just far too much data to be able to view our opportunities any other way than a visual representation. The old way was far too time consuming, and the reality is that only about 20% of the reports we created before were actually used. Today we can define the data that is important to each person, and then have the data sent to each individual in a pre-defined automated fashion. Sage SalesLogix is great because it works the way we do.”

TO LEARN MORE ABOUT SAGE SALESLOGIX, PLEASE VISIT WWW.SAGECRMSOLUTIONS.COM OR CALL 1-800-643-6400 TO SPEAK WITH A REPRESENTATIVE.

About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, Sage CRM, and Sage SalesLogix. Over 63,500 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.