

REAL ESTATE

Case Study: Accelerating Property Hub's Client Satisfaction with Dynamic and Flexible Grids

Overview

Property Hub helps hundreds of busy professionals build life-changing portfolios of property deals through its services, Property Hub Invest, and shares everything it learns with its audiences and members.

However, their Sales Progression team needed a solution to provide better visibility and interaction with their subset of Sales data in Salesforce, with more columns, conditional formatting (highlighting) and more capabilities than Salesforce could provide.

Challenge

Property Hub wanted to push their Sales targets forward and support more clients to invest better and faster than what was happening. Key challenges include:

- Sales users wanting to **make quick and multiple updates/edits** across their data, while having a clearer overview of complex subset Sales data.
- More flexibility over how data is displayed, from the **number of columns** provided by standard Salesforce List Views to **being able to highlight data across their Sales Progression data**.
- **Better filtering capabilities to drill down into client lists** and focus more closely on preferences, then matching up properties with what they have available for sale.
- Needing an **easy-to-install and set up solution** that Property Hub could start using immediately.

Solution

Our Grids enabled their Sales Teams to improve and accelerate their data management processes. Admins could also tailor Grids to the Sales Progression team's multiple needs, as Grids are simple to set up with RavenApps comprehensive User Guides and Customer Support.

1. **Plethora of Features to Speed Up Sales Processes**

Inline Edit, Mass Update, Freeze Column, Conditional Formatting, and many more Grid features empowered the team to manage, organise and update their Sales Progression data with more accuracy and clarity.

2. **Easy Configuration**

Admins can tailor and add features to Grids, so each Grid holds the full extent of the Sales Progression data, so end-users are fully equipped to achieve their quotas successfully.

3. **More Data Seen and Actioned**

Sales Progression teams gain greater clarity and control over what data and actions are added to Grids, from creating flows, grid views and generating many rows and columns, to conditional formatting, enabling easier recognition of next steps and client preferences.

The diversity and multitude of features available in one solution, and the ease of use of Grids, were key components in Property Hub's decision to choose RavenApps, as they wanted a solution that would resolve their pain points and allow their admins to set up the new solution efficiently and effectively.

Results

After installing and setting up RavenApps Grids, Property Hub significantly increased its end-user Sales productivity and client satisfaction. Here are some notable outcomes:

- The Sales Progression team now updates Sales data much more quickly, due to the dramatically improved user experience. Grids provide the team with a critical and clear overview of data and flexibility over in-line updates that they desperately needed.
- The automations they can trigger using the in-Grid buttons to call flows have saved a lot of time sending emails manually, as well as generating Grid views for each new Sales development.
- Transforming the experience, the wide range of features, including frozen columns, dynamic filters, and conditional formatting, empowers Property Hub's teams to enhance sales by enabling more personalised interactions through improved data control.

Property Hub saved time across multiple areas and is now looking for more ways to support the deployment of Salesforce for other users' benefit.



AppExchange ★★★★★

Partnership Experience

"Excellent – the support is incredible, very prompt, and issues (and sometimes small improvements) are delivered very quickly.

The user experience has improved dramatically – grids are the go-to place to update data for our Sales Progression team, and the overview it gives them of a subset of the sales they are managing is invaluable."

Tony Barker | Salesforce Manager



Advice for Other Firms

The team at Property Hub highly recommends that other firms "go ahead" if they are considering implementing Grids, as grids offer incredible flexibility and functionality. Additionally, there are many exciting developments in the pipeline at RavenApps that are constantly improving and transforming the solution for the benefit of our customers. Property Hub has noticed that we are also very "focused on the grids app, and its improvement means it does what it does incredibly well".