



Streamlining Global Real Estate Investment with Salesforce



CUSTOMER OVERVIEW

Aetos Capital is an independent investment management firm specializing in real estate investment opportunities in Asia, Japan and Greater China. Their team has extensive experience in related fields including individual resource and equity purchases, privatization of listed real estate companies, acquisitions of distressed debt, and investments in development projects. After identifying attractive real estate transactions, Aetos then adds value through active asset management, partnering with the developers, investing capital to reposition assets, launching creative leasing efforts, optimizing asset performance and reducing expenses, and by restructuring and refocusing companies that derive value from real estate and related assets.

CUSTOMER COMPANY PROFILE

LOCATION:	<i>New York City, NY, Tokyo Japan</i>
EMPLOYEES:	<i>19</i>
INDUSTRY:	<i>Real Estate Investment Management</i>
Solution(s):	<i>Sales Cloud</i>
GO LIVE DATE:	<i>May 2019</i>

Challenge	Solution	Results
<p>Aetos has historically tracked its customers, partners and related activities using a combination of Outlook, Excel, and PreQin; the leadership of this growing global organization wanted to improve their efficiency and gain access to more timely and accurate information. Salesforce was viewed as a tool that could streamline Aetos' business development and capital raising activities. Management hoped that by bringing business processes, data, and users together in a single system they could seamlessly track customers, strategic partners, activities, and opportunities while ensuring that all new information could be captured through integration with Microsoft Outlook.</p>	<p>Saasinct leveraged many existing Salesforce features to quickly deliver a solution tailored to Aetos' business. This gave users an opportunity to familiarize themselves with Salesforce and start achieving new efficiencies, while Saasinct continued to work with stakeholders in planning the next set of roadmap enhancements to Aetos' platform. Key aspects of project work completed by Saasinct's team in the first phase of the project included:</p> <ul style="list-style-type: none"> Configured Aetos' Salesforce org with our Best Practices, developed through years of experience working with financial services firms. We then designed the security model, created user profiles, and set up their users in Salesforce. Customized Salesforce to align with ACRE's business processes for tracking investors, partners, and deals. We then added custom objects and fields to track funds and entity relationships, and tailored page layouts to enhance usability and increase adoption. Scrubbed their original data, sourced from Outlook and Excel spreadsheets, to allow for a clean import of accounts, contacts, and activity history to Salesforce. We also implemented data quality controls, migrated their data, and configured Inbox to allow for association of emails and tasks in Outlook with records in Salesforce. 	<ul style="list-style-type: none"> As a result of the work done in the first phase of the project, Aetos' team has experienced a significant improvement in productivity. Specifically, the team now has a centralized and secure platform where relationships and deals are easier to manage, and data is more accurate and complete. By removing unnecessary fields and features and tailoring Salesforce to Aetos' business processes, Saasinct was able to simplify the user interface, making it more intuitive and accessible. Further, the integration between Salesforce with Outlook using Salesforce Inbox has allowed users to collaborate more easily, see each others' calendars, and manage their time more efficiently. By centralizing all critical business data in a single platform, Aetos now has a 360-degree view of their clients, partners, activities, and business development pipeline. Their users now spend less time searching for critical information, and more time focused on building relationships and fund-raising activities.

Additional Details

Competitors of Salesforce engaged in sales cycle:	None
Previous technology replaced by Salesforce:	Outlook, Excel
Salesforce products deployed:	Sales Cloud
Customer Business Model (B2B, B2C, or Both)	Both
Salesforce Product features:	Custom Objects
If using Service Cloud, list use case (e.g. customer support, call center, field service, telesales, etc.)	N/A
Integrations:	Office 365, PreQin
AppExchange Apps/Partners	N/A

The screenshot displays the Salesforce CRM interface for Aetos Capital Real Estate. The account being viewed is 'Saasinct Solutions', owned by Charles Griffith. The interface is divided into several sections:

- Account Header:** Shows the account name 'Saasinct Solutions' and basic contact information: Phone (240) 630-4160, Street Address (9944 Mayfield Drive, Bethesda, MD 20817, United States), Website (www.saasinct.com), and Account Owner (Charles Griffith).
- Related List Quick Links:** Provides shortcuts to related records: Related Contacts (4), Opportunities (8), Funds (7), Referred Accounts (0), Referred Contacts (0), Notes (0), and Files (0).
- Details Section:** A table-like view of account fields:

Account Name	Saasinct Solutions	Account Owner	Charles Griffith
Parent Account		Phone	(240) 630-4160
Primary Contact		Website	www.saasinct.com
Secondary Contact		Last Activity	2/18/2019
Active	<input type="checkbox"/>	Type	Other
Townsend Client	<input type="checkbox"/>	Rating	
- Investment Information:** Fields include Investor Category, Investment Location, Other Investment Location, and Min. Investment Size.
- Additional Information:** Fields include Prior Aetos Investor?, Account Source, Industry (Technology), Real Estate Type, Other Real Estate Types, and Employees.
- Address Information:** Shows Street Address (9944 Mayfield Drive, Bethesda, MD 20817, United States) and Mailing Address.
- Activity Panel:** On the right, it shows a 'Log a Call' form and a list of activities. A message states: 'We found no potential duplicates of this account.' The activity list includes:
 - Send Letter: Charles Griffith has an upcoming Task with Alex Guo (Feb 12)
 - TEST: Charles Griffith has an upcoming Task with Saasinct Support (Jan 22)
 - This is a Test: Last opened Feb 18, Charles Griffith sent an email to Lexi Carino (4:32 PM | Feb 18)
 - Call: Charles Griffith logged a call with Lexi Carino (Feb 18)
 - Send Quote: Charles Griffith logged a call with Lexi Carino (Feb 18)
 - Call: Charles Griffith logged a call with Alex Guo (Feb 18)
 - Call: Charles Griffith had a Task with Katie Bluth (Feb 5)
 - TEST: Charles Griffith had a Task with Saasinct Support (Feb 1)

AETOS CAPITAL REAL ESTATE

ACRE Home Notes Campaigns Accounts **Contacts** Opportunities Funds Dashboards Reports

All kat

Contact
Katie Bluth

+ Follow Edit Delete New Note

Title: Business Architect
Account Name: [Saasinct Solutions](#)
Phone (2): (240) 630-4160
Email: kbluth@saasinct.com

Related List Quick Links

- Related Accounts (1)
- Opportunities (0)
- Funds (7)
- Referred Accounts (0)
- Referred Contacts (0)
- Campaign History (1)
- Notes (0)
- Files (0)
- Contact History (0)

Details Related

Name	Katie Bluth	Phone	(240) 630-4160
Account Name	Saasinct Solutions	Mobile	
Title	Business Architect	Other Phone	
Reports To		Fax	
		Do Not Call	<input type="checkbox"/>
		Email	kbluth@saasinct.com
		Alt Email	
		Email Opt Out	<input type="checkbox"/>

Address Information

Street Address: 9944 Mayfield Drive
Bethesda, MD 20817
United States

Additional Information

Department

Description Information

Activity Chatter

Log a Call New Task Email

Recap your call... **Add**

Filters: All time · All activities · All types

Next Steps: **More Steps**

No next steps. To get things moving, add a task or set up a meeting.

Past Activities

- Call: Charles Griffith had a Task about Saasinct Solutions (Feb 5)

Recent Items

The screenshot displays the Salesforce interface for Aetos Capital Real Estate. The top navigation bar includes the company logo, a search bar, and various menu items like 'ACRE', 'Home', 'Notes', 'Campaigns', 'Accounts', 'Contacts', 'Opportunities', 'Funds', 'Dashboards', and 'Reports'. The main content area is titled 'Fund 1' and features a progress bar with stages: Diligence (active), LOI, Documentation, Passed, Lost, Invested, and Exited. Below the progress bar, there are 'Related List Quick Links' for Notes (0), Files (0), and Fund History (1). The 'Details' section is divided into 'Related' and 'Additional Information' tabs. The 'Related' tab shows a table with fields: Funds Name (Fund 1), Entity (Entity 1), Account (Saasinct Solutions), Contact (Katie Bluth), Stage (Diligence), Fund Source, Fund Close Date (2/6/2019), and Date Sourced. The 'Additional Information' tab shows: Fund Country, Fund Region (LATAM), Amount (\$12,000), and Next Steps. The 'System Information' tab shows: Created By (Charles Griffith, 2/14/2019 2:20 PM) and Last Modified By (Charles Griffith, 2/18/2019 5:08 PM). On the right side, there is an 'Activity' panel with options for 'Log a Call', 'New Task', and 'Email'. It includes a 'Recap your call...' field and an 'Add' button. Below this, there are sections for 'Next Steps' and 'Past Activities', both with 'More Steps' and 'Load More' buttons respectively. The bottom left corner has a 'Recent Items' link.

AETOS CAPITAL REAL ESTATE

ACRE Home Notes Campaigns Accounts Contacts Opportunities Funds Dashboards Reports

Fund 1

+ Follow Edit Delete New Note

Diligence LOI Documentation Passed Lost Invested Exited Mark Stage as Complete

Related List Quick Links

Notes (0) Files (0) Fund History (1)

Details Related

Funds Name	Fund 1	Stage	Diligence
Entity	Entity 1	Fund Source	
Account	Saasinct Solutions	Fund Close Date	2/6/2019
Contact	Katie Bluth	Date Sourced	

Additional Information

Fund Country		Amount	\$12,000
Fund Region	LATAM	Next Steps	

System Information

Created By	Charles Griffith, 2/14/2019 2:20 PM	Last Modified By	Charles Griffith, 2/18/2019 5:08 PM
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Activity Chatter

Log a Call New Task Email

Recap your call... Add

Filters: All time • All activities • All types

Refresh Expand All

Next Steps More Steps

No next steps. To get things moving, add a task or set up a meeting.

Past Activities

No past activity. Past meetings and tasks marked as done show up here.

Load More Past Activities

Recent Items

The screenshot displays the Salesforce CRM interface for AETOS CAPITAL REAL ESTATE. The main record is for an Opportunity named 'Opportunity 1'. The interface includes a navigation menu at the top, a search bar, and a detailed view of the opportunity with various fields and sections.

Opportunity Details:

- Account Name: Saasinct Solutions
- Close Date: 2/4/2019
- Amount: \$25,000.00
- Opportunity Owner: Charles Griffith

Opportunity Stages: Initial Contact (Current), PPM Sent, In Discussions, Waiting, Closed. A 'Mark Stage as Complete' button is visible.

Related List Quick Links: Contact Roles (0), Files (0), Notes (0), Stage History (3), Opportunity Field History (2).

Details Section:

Opportunity Owner	Charles Griffith	Close Date	2/4/2019
Opportunity Name	Opportunity 1	Probability (%)	25%
Account Name	Saasinct Solutions	Amount	\$25,000.00
Entity	Entity 1	Source Type	
Next Steps		Type	New Business

Progress Section:

Stage	Initial Contact	Commitment	
Anticipated Close Date		Commitment Range - Low	
Confidence		Commitment Range - High	
Loss/Pass Reason			

Additional Information Section:

Primary Contact		Lead Source	
Primary Campaign Source			

Description Information Section:

Description: [Empty field]

System Information Section:

Created By	Charles Griffith, 2/11/2019 4:56 PM	Last Modified By	Charles Griffith, 3/4/2019 7:58 AM
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Activity Section:

Activity Chatter

Log a Call New Task Email

Recap your call... [Add]

Filters: All time • All activities • All types

Next Steps: No next steps. To get things moving, add a task or set up a meeting.

Past Activities: No past activity. Past meetings and tasks marked as done show up here.

[Load More Past Activities]