

CrowdStreet reduces client response times by 100% with JustCall

With \$2.8 + billion invested across thousands of real estate investors, CrowdStreet is a leading online real estate investing platform that is rated best in its class by Investopedia.



24-HOUR

Hour response times, down from several business days

12+

Hours of time saved weekly for each representative

< 1

Hour to set up and port JustCall software

Company

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Headquarters

Portland, Oregon

of Employees

200

Key Features Used

- Local calling
- Call recording
- Team monitoring and analytics
- HubSpot integration

Industry

Real Estate

The Challenge: Ineffective phone software hampering growth

CrowdStreet is largest online real estate investment platform in the United States that connects commercial developers, owners, and operators with real estate investors. With so many parties involved at any given time, effective client communication is an essential part of achieving success.

CrowdStreet’s investor care team regularly calls real estate investors to check on asset performance. While working with his team, Reed Lewallen, Manager of Investor Care at Crowdstreet, identified several issues with their existing phone software. Specifically, the system led to client frustration for a number of reasons:

- Call quality was inconsistent and sometimes poor.
- There was no welcome message directing clients to the correct department.
- Response times could be as long as a few business days.

The investor care team also struggled with the software, as it had limited features and didn’t integrate smoothly with their CRM. As a result, the care team was inundated with inbound calls and lacked access to previous call records, causing them to feel ill-prepared to handle client issues.

Without access to call records, the care team was forced to spend their time dealing with phone conversations with little to no context, even when issues could have been handled via an email follow-up.

Our Solution: Seamless CRM integration & proactive customization

CrowdStreet chose JustCall as their new cloud phone system, primarily due to a features list that checked all the boxes without being overwhelming. The team also appreciated that JustCall had made a name for itself by providing excellent support as compared to existing entrenched players.

The system was fully up and running within two weeks. Excellent call quality and helpful hierarchical navigation instantly improved the client experience.

CrowdStreet was easily able to integrate JustCall with HubSpot, its CRM of choice. This integration allows any member of the investor care team to initiate a call from within HubSpot. Each call is automatically tracked and recorded in the contact's record within moments.

The team can even pull SMS text records and voicemails into HubSpot, associating all relevant information with contact records or support tickets. This way, any authorized user who accesses the system can get the full picture of every previous interaction with any given investor

Lewallen is also able to leverage this call data for internal training purposes. Members of the investor care team can review their own calls and learn from mistakes. Managers can also review calls taken by each team member and make real-time decisions about workload or providing extra assistance.

“JustCall has helped us troubleshoot various functionality within HubSpot so we can use it more efficiently. It feels like we’re cared for and when we’ve had issues, they’ve been adaptable and approached everything in a can-do, problem-solver way.”

Reed Lewallen,

Manager of Investor Care at CrowdStreet

The Results: Huge impact on Customer Service Times & Team Efficiency

The biggest impact of JustCall's technology is the increased efficiency and the ability to infer and record the context of every customer communication. The investor care team now saves up to 12 hours per week per team member, thanks to JustCall's seamless integrations with their CRM. These time savings have allowed the team to transition from reactively handling inbound calls to a focus on strategic, effective outbound calls to clients.

“Creating that planned one-on-one interaction helps both parties prepare. When a call comes in, the support person has already looked through the appropriate account and is ready to discuss it. This has changed the way we communicate with customers over the phone,” says Lewallen.

“Partnering with JustCall was the right decision for our stage of growth. We needed to change how we communicated with our investor clients and JustCall helped us do that in a professional manner.”

Reed Lewallen,

Manager of Investor Care at CrowdStreet

Since managers are able to track call volume and workload, they're able to provide more support and encouragement, helping team members improve over time. With greater access to context for each conversation, team members are able to make more informed decisions about whether a client truly needs a phone call or whether tickets can be resolved with a follow up email.

“We can identify which reps could maybe do more via email and still be just as effective,” Lewallen says – a change that creates significant time savings, especially during a time of rapid scaling and growth.

Power your customer facing teams with JustCall

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