

Salesforce - Lease Logs

Case Study: Lease log solution to improve capturing, storage and reporting

BACKGROUND

A Private Retail focused developer/manager made extensive use of email, word and manual processes to communicate and store core lease log information.

This included:

- Copying and pasting emails and replies into word documents to create a chronological log
- Use of folders for each tenant and property stored in a shared network drive
- Navigating through multiple word documents to retrieve lease logs to perform tenant and property research

THE CHALLENGE



Manual Tasks

To maintain lease data several heavily manual and inefficient steps had to be performed regularly



Search Capability

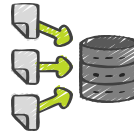
The method of storing lease data made it very difficult to find and keep data up to date



Data Quality

Manual process and tools resulted in data quality issues

THE SOLUTION



Salesforce was used to create a central lease log data model with key tenant, deal and/or property info



Lease Log information screens allow for easier creation, maintenance and discovery



Integration with existing email and property data systems (MRI)

THE RESULT



Lease Data is accurate, accessible and can be easily found



Holistic view of tenants across properties



Professional engagement through standardized emails



Accurate reporting based on defined categories