

Case Study

About Client

Our client is a leading American commercial real estate service & investment firm that embarked on a digital transformation journey to overcome the challenges of fragmented data & a cumbersome property and lead portfolio management system.

Problem Statement

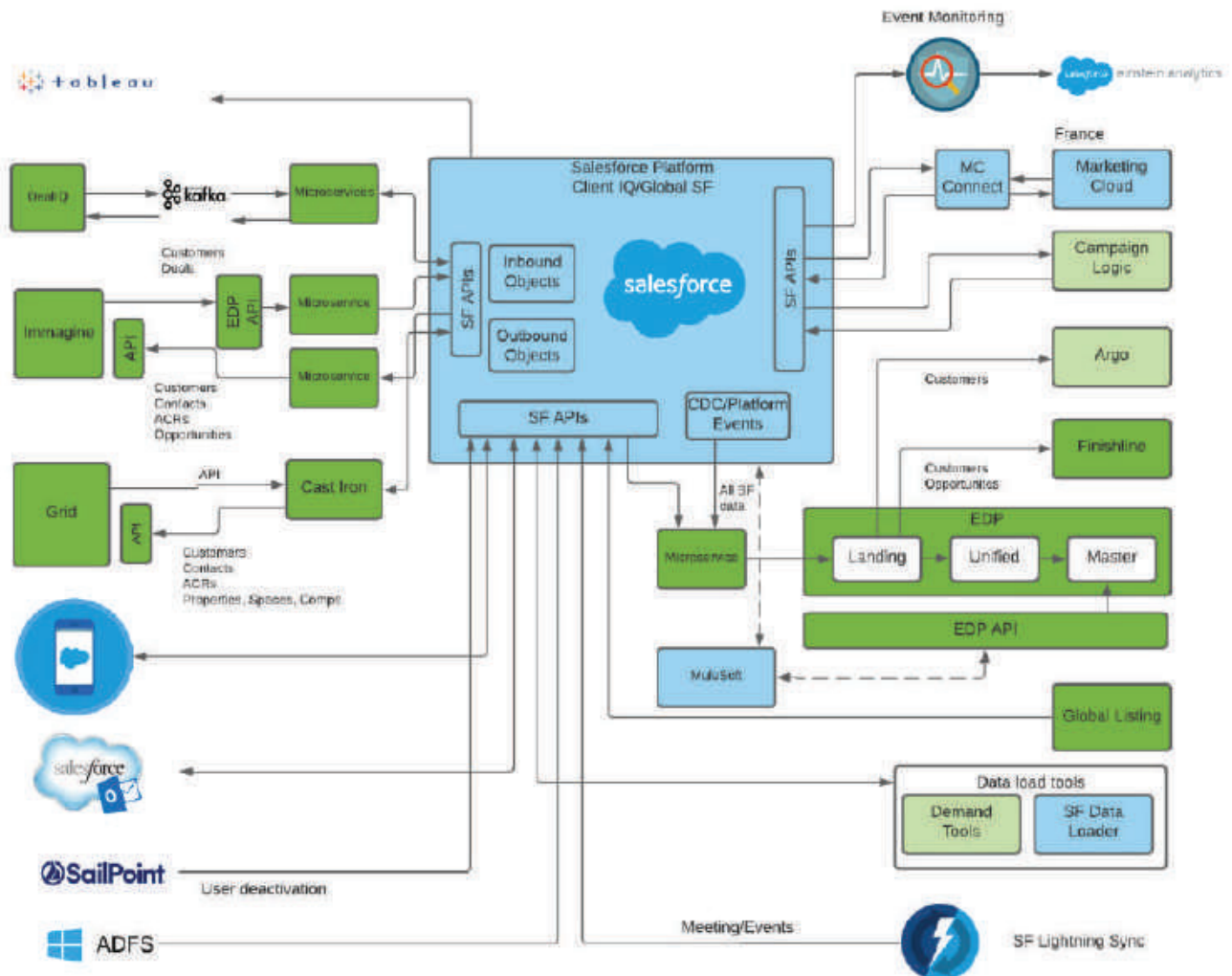
The Client faced several obstacles with storage exceptions, object exceptions, and excessive fields created across objects. Many processes were cumbersome due to scattered data across multiple systems, hindering their ability to make more informed decisions. The existing system proved to be inefficient and sub-optimal. Hence, Client approached Dextara team to analyze and enhance the existing global property and portfolio management system, streamline operations, centralize data management, and enhance customer experience.



Solution

Dextara devised a comprehensive solution, customizing the Global property and portfolio management system to address the Client's unique requirements. Dextara implemented Sales Cloud, Einstein Analytics, supported Marketing Cloud to enhance all the business processes & gain valuable insights into the opportunities.

- › **User and Lead Interaction System:** Dextara seamlessly integrated external systems, enabling sales representatives to capture leads within & outside the Salesforce ecosystem. By integrating Imagine, Grid with custom APIs & Deal IQ with Kafka microservices, lead data was consolidated & made agile, centralizing it within the Salesforce platform.
- › **User Activation/Deactivation:** To simplify the process of user activation and deactivation, Dextara implemented SailPoint and ADFS applications. This allowed users to enter details directly into the Salesforce environment to create or delete their accounts.
- › **Data Integration Tools:** Dextara utilized Salesforce Data Loader & Demand Tools for efficient data loading & bulk account merging. The team leveraged MuleSoft integration with the EDP API system and Salesforce to seamlessly synchronize data between the platforms. Argo & FinishLine were also employed to expose opportunity data (upon converting from lead to opportunity) to the Marketing & Sales teams of the different geographical regions.
- › Developed key components of the solution, including tailored validation rules, workflows, APIs, and custom metadata to overcome the limitations of the existing system.

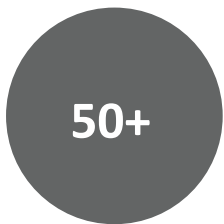


Challenges

Dextara encountered challenges during data integration due to disparate object modeling and data redundancies across the systems. Extensive analysis was conducted to map data fields accurately, & data loading hurdles caused by duplication and record merging were addressed. The Dextara team resolved bugs, governor limit exceptions, and other issues in the Client's Global property and portfolio system.

Outcomes

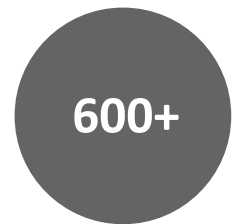
- 01** 3X increase in user adoption rates.
- 02** **Data Agility:** Streamlined data integration and centralization enabled swift decision-making & enhanced operational efficiency.
- 03** **Improved Lead Management:** Our Client gained better control & visibility over leads, improving conversion rates and customer engagement.
- 04** **Enhanced Customer Experience:** With a centralized system, Client teams could deliver personalized and timely services, fostering positive customer experiences.
- 05** **Efficient Portfolio Management:** The solution facilitated efficient tracking, analysis, and management of global property and lead portfolios.
- 06** **Actionable Insights:** Leveraging Einstein Analytics, the business teams could generate reports, gain valuable insights, and create interactive dashboards using event monitoring data.



Clients



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