



Streamlining Onboarding & Compliance for a Global Real Estate Investment Leader

Overcoming Manual Processes with Automation Improving slow client onboarding and complex compliance approvals using Salesforce solutions.



EXECUTIVE SUMMARY

A global real estate investment firm managing over \$200 billion in assets across 32 cities was struggling with slow, manual onboarding and complex compliance approvals.

Blue5Green implemented an end-to-end solution using Salesforce products – including Sales Cloud, Service Cloud, Marketing Cloud, and Experience Cloud – alongside .NET, Oracle Database, Anduin, Red Oak Compliance, and ForgeRock. By automating critical processes, managing large file transfers, and enhancing client communication, the solution cut down processing times, reduced errors, and improved investor satisfaction.



CLIENT BACKGROUND

The client is a prominent real estate investment firm managing billions in assets across multiple markets.

They offer a variety of real estate equity and debt products to investors and borrowers worldwide. Their mission is to provide access to diverse real estate solutions while maintaining high standards of performance and trust. Their global presence and complex portfolio required dependable systems to sustain their operations.



THE CHALLENGES

The client encountered significant obstacles due to manual processes in investor onboarding and compliance approvals. Onboarding involved multiple steps, such as tax checks and document reviews, often leading to delays and increased error risks. Large file transfers—frequently exceeding 100MB—posed additional challenges due to system incompatibility.



Manual Client Onboarding:

The slow and inconsistent process caused delays and tracking difficulties.



Complex Compliance Approvals:

Multi-stage compliance tasks and large file transfers led to inefficiencies and increased the risk of delays.



Inefficient Communication:

PRU-mandated communication and subscription management for equity and debt products were inconsistent and labor-intensive.



Limited Data Tracking:

The lack of real-time updates hindered the ability to monitor client progress, affecting speed and accuracy.

These issues slowed operations and impeded the firm's responsiveness to market demands

THE SOLUTION

Blue5Green deployed a robust solution using Salesforce products and supporting technologies to automate key processes:

- **Automated Client Onboarding:** Integration with Anduin automated client onboarding, including compliance, tax, and document approvals. Real-time status updates in Salesforce improved client tracking accuracy. Automatically creating records for organizations, investments, and commitment amounts.
- **Streamlined Compliance Workflows:** Connecting Salesforce with Redoak through REST APIs and GraphQL enabled efficient large file transfers and multi-stage compliance approvals.
- **Enhanced Communication Systems:** Marketing Cloud automated subscription management and personalized communications, ensuring alignment with PRU guidelines.
- **Identity and Security Integration:** Implemented ForgeRock for Single Sign-On (SSO), enhancing security while simplifying user authentication.
- **Investor Flow Portal:** Developed a portal providing investors with real-time access to market data, assets under management (AUM) data, and investment opportunities.

Each phase of the project was meticulously planned to align with the client's needs and existing systems.





RESULTS & BENEFITS

The solution delivered measurable benefits:

Accelerated Processing:

Automation reduced onboarding and compliance check times, allowing teams to complete tasks more quickly.

Improved Accuracy:

Minimizing manual input improved data consistency and reliability.

Enhanced Communication:

Automated messages provided investors with timely and accurate information, fostering trust and satisfaction.

Effective Large File Management:

Specialized methods for handling large file transfers ensured smooth and timely document sharing.

Stronger Security:

SSO with ForgeRock enhanced security without adding complexity.

CONCLUSION

By automating manual processes and improving data flow, Blue5Green helped this global real estate firm accelerate operations, reduce errors, and improve investor satisfaction.

This case shows how Salesforce solutions, combined with supporting technologies, can transform operations for companies managing complex, high-volume processes. If your organization faces similar hurdles, contact Blue5Green to explore how Salesforce solutions can improve efficiency and streamline operations.

