

CLIENT SUCCESS STORY

National Multifamily Firm

Engineering a Unified Customer 360 Platform to Replace Legacy Property Management Systems Across a 25,000+ Unit National Multifamily Portfolio

70,000

Active Portal Use

25,000+

Residential Units
Managed

14

Enterprise
Integrations

\$2M

Processed in
First 24 Hours

THE CHALLENGE

The client is a major national multifamily real estate investment firm managing a portfolio of over 25,000 residential units. With properties spanning multiple states, the organization's leasing agents, property managers, and corporate teams relied on a fragmented technology stack that had become a critical operational bottleneck.

The firm was entirely dependent on ResMan (property management) and KnockCRM (lead management)—two isolated platforms that forced agents into fragmented “swivel chair” workflows across disconnected systems for marketing syndication, telephony, quoting, lease generation, and financial reconciliation. It was virtually impossible to track the end-to-end leasing process with enough granularity to pinpoint conversion blockages. Routine activities—following up on tenant notices, scheduling tours, processing renewals—were difficult to prioritize due to the absence of automated dashboards. Crucial property data had to be manually re-keyed from ResMan into Internet Listing Services like Zillow and Apartments.com, introducing severe data latency and costly human errors. Leadership had no closed-loop attribution between marketing spend and placed leases, and carried severe compliance risk from fragmented communication logging.

THE VANTAGE POINT SOLUTION

Vantage Point architected and delivered an enterprise-scale Salesforce transformation to completely deprecate ResMan and KnockCRM, establishing a unified, cloud-native Customer 360 ecosystem anchored by Salesforce and Workday Financials. The initiative automated the entire lead-to-lease lifecycle, deployed a bespoke tenant self-service portal, and seamlessly synchronized high-volume transactional data with corporate accounting ledgers. Working closely with the client's CIO and executive stakeholders, we delivered across three major deployment phases:

Property Management CRM & Marketing Syndication Replaced KnockCRM with Salesforce Sales Cloud as a highly automated lead ingestion engine. Integrated bi-directional MITS-format feeds with Rentable, Zillow, and Apartments.com for real-time vacancy syndication. Deployed self-service tour booking, digital engagement chatbots, and CallRail telephonic integration ensuring every prospect touchpoint was logged and actionable within Salesforce.

Resident Self-Service Portal Engineered a Salesforce Communities portal serving 37,000+ residents across the national portfolio. Delivered real-time ledger display with Snowflake data warehouse integration, secure online payments via Chargent/Aptexx gateways, maintenance service request submission with photo upload and auto-routing, and Check21/Payology mobile check capture with OCR extraction and automated X9 bank file transmission.

Financial Integration & Lease Automation Engineered bi-directional Workday Financials synchronization for AR ledgers, lease charges, and rent payments on a daily batch basis. Built API-driven Blue Moon integration for dynamic, state-specific lease document generation with DocuSign e-signature and automated write-back. Deployed Conga/Formstack document assembly and unit inventory state-machine logic for real-time marketing feed updates.

RIGOROUS DEPLOYMENT METHODOLOGY

Delivered across a disciplined agile methodology with Snowflake ETL acting as the data migration intermediary—transferring entire property portfolios, unit inventories, thousands of lease agreements, resident profiles, and open AR balances from legacy systems. Conducted exhaustive UAT in dedicated sandbox environments, systematically resolving Workday tax field mapping, email relay configurations, and permission architecture prior to production deployment. Completed comprehensive documentation and structured technical handoff to the client’s internal IT team.

WORKFLOW AUTOMATION

METRIC	BEFORE	AFTER VP DEPLOYMENT
System Architecture	ResMan + KnockCRM + siloed tools	Unified Salesforce Customer 360 with 14 integrations
Leasing Workflow	Manual swivel-chair across 5+ systems	Automated lead-to-lease with ILS syndication
Resident Self-Service	Basic legacy portal	Branded portal: 70K users, self-service payments + maintenance
Payment Processing	Fragmented collection methods	\$2M processed in first 24 hours; ACH + check scan
Financial Systems	No CRM-to-ERP sync	Bi-directional Workday AR/lease charge sync
Lease Generation	Manual document assembly	Automated Blue Moon + DocuSign with write-back
Marketing Attribution	No spend-to-lease visibility	Closed-loop tracking across ILS channels

TECHNOLOGY STACK

- Salesforce Financial Services Cloud
- Salesforce Communities (Resident Portal)
- Workday Financials (Bi-Directional)
- Snowflake (ETL / Data Warehouse)
- Blue Moon (Lease Document Engine)
- DocuSign (e-Signature + Write-Back)
- Chargent / Aptexx (Payment Gateway)
- Check21 / Payology (Check Capture + OCR)
- Rentable, Zillow, Apartments.com (ILS)
- CallRail (Telephonic Integration)
- Conga / Formstack (Document Assembly)
- RingCentral (Communications)

CLIENT TESTIMONY

“Vantage Point has been awesome partners. Total transparency and tireless, around-the-clock efforts to deliver a massively complex technological rollout. The momentum generated post-launch and the extraordinary diligence in mapping complicated legacy processes into modern digital workflows has been impressive.”

— Chief Operating Officer

WHY VANTAGE POINT

Vantage Point is a Salesforce Consulting Partner focused exclusively on financial services. Our 100% senior-level, US-based delivery team brings 150+ years of combined industry experience across wealth management, banking, insurance, fintech, and mortgage lending. With 400+ engagements, 150+ clients, a 95% retention rate, and a 4.71/5.0 satisfaction score, we deliver measurable results—not just implementations.

Ready to modernize your real estate technology?

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