

Industry

- Financial Services
- Real Estate

Project Outcomes

- Improved account visibility
- Improved data integrity

Solution Features

- Sales Cloud
- RCM integration
- Data migration



About AppCentrica

We've built our Salesforce practice one customer at a time based on quality and strong relationships. We deliver proven solutions for:

- Sales Cloud + CPQ
- Service Cloud + FSL
- Einstein Analytics
- Community Cloud
- MuleSoft
- Pardot
- B2B Commerce
- Heroku & Custom Lightning Development

About Avison Young

Avison Young is the world's fastest-growing commercial real estate services firm. Headquartered in Toronto, Canada, Avison Young is a collaborative, global firm owned and operated by its Principals. The company comprises approximately 5,000 real estate professionals in 120 offices in 20 countries.

Challenge

In its infancy, Avison Young implemented a purpose-built real estate CRM tool. Unfortunately, as Avison Young continued to grow it became evident that the tool was limited in terms of enterprise scalability and also lacked crucial functionality. In addition, data governance had become an organization-wide challenge – duplicate and obsolete records were commonplace throughout the system. The solution and its data had become siloed and brokers could not identify which accounts had already been actioned. Finally, the existing solution lacked integration with RCM, a key source of investor data.

Solution

AppCentrica worked with Avison Young to identify their requirements and build a solution roadmap with a pristine version of Salesforce at the center. Redundant and obsolete data was removed, and data from varying sources was consolidated.

Once complete, AppCentrica implemented Sales Cloud and managed a data migration. Additionally, to help enforce better data governance practices for the future, duplicate management tools were installed and the relevant parties were trained on how to best leverage them.

Account, opportunity and contact records were configured to best suit the needs of the business and opportunity teams were setup to allow for visibility into deal progression. An integration was built to RCM enabling brokers to live within a single system. Chatter groups were also configured to improve internal communications. Finally, AppCentrica created "help request" functionality within Salesforce, further streamlining the user experience, as previously those requests were handled in an external system.

Outcomes

With the completed implementation of Sales Cloud Avison Young employees have a consolidated system of record, free of redundancy and inconsistencies. Adoption rates saw an uptick and the refined system has encouraged users to input better notes and updates. Management has better insight into deal progression and opportunity teams have fostered a more collaborative approach to selling and managing relationships. Finally, the Sales Cloud platform will more easily enable any future acquisitions.



"The Appcentrica team worked around the clock to quickly create a Salesforce environment from scratch that allowed us to connect a team of about 150 people across the US and put us on the path to success. They cleansed our data, put best practices in place and integrated our customer database with our deal management platform, no easy task!"



John Kevill

Principal & Managing Director, US Capital Markets, Avison Young