

# APPCENTRICA CUSTOMER SUCCESS STORY

## CAPREIT



### Industry

- Real Estate
- Financial Services

### Project Outcomes

- Email and phone diversion at 90%+
- Greatly reduced manual effort
- Improved customer satisfaction

### Solution Features

- Service Cloud
- Sales Cloud
- CTI integration with Ring Central
- SAP integration support
- Custom Apex development



### 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 CAPREIT

As one of Canada's largest residential landlords, CAPREIT is a growth-oriented investment trust owning interests in over 41,000 residential units, located in and near major urban centres across Canada and Dublin, Ireland.

### Challenge

CAPREIT made an investment in both Sales and Service Cloud but neither system was optimally configured to best support their respective teams.

From a sales perspective, inbound rental inquiries were handled directly by phone or email with no sophisticated routing system in place. As well, emails inquiries were often being sent to CAPREIT from third-party rental services (Kijiji, Craigslist, etc.) but CAPREIT lacked a method to automatically capture these inbound leads.

From a service perspective, existing tenants had no easy way to open support cases and customer service reps relied on a series of manual processes. Similarly, regional building managers lacked an efficient way to create and log tasks while on the go which contributed to a general lack of visibility.

Finally, CAPREIT needed support finalizing an SAP integration and a CTI integration with RingCentral.

### Solution

CAPREIT engaged AppCentrica to make a series of changes to mitigate the various business challenges they were facing.

First, AppCentrica developed an intelligent email parser to extract client data from third-party rental inquiries (Kijiji, Craigslist, etc.) and automatically create and route leads accordingly.

Second, apex custom coding was used to create a fully customized interface for rental inquiries and to book showings. The same interface could also be leveraged by existing tenants to open support tickets and log cases automatically.

Third, AppCentrica developed a custom Salesforce mobile application specifically for CAPREIT's regional building managers.

This application enabled managers to log notes, create tasks and book showings with clients while on-site and in real-time.

Finally, AppCentrica supported an integration with SAP via Dell Boomi and a computer telephony integration (CTI) was built out with RingCentral. These integrations helped to ensure CAPREIT could effectively manage rental inquiries from many different sources, and quickly convert them to appointment bookings.

### Outcomes

Due to the complex nature of this Salesforce project considerable amounts of custom development were required. Overall, the final product was both polished and very intuitive. As well, and much to the delight of the several project managers involved, the planned training sessions were forgone due to a very high rate of natural user adoption. In addition, email and phone diversions enabled through CTI exceeded 90% and the email parsing solution achieved 98% accuracy – representing major improvements to process efficiency and a significant reduction to operating costs.



*"We undertook a major digital transformation effort to provide a system to manage both rental inquiries (sales) and service requests (service). This meant not only setting up a full call centre solution based on Service Cloud, but also providing Salesforce access to building and site managers. AppCentrica worked tirelessly with us as the solution evolved beyond core functionality to include customization for our home page, telephony integration and finally SAP integration. User adoption is very high, reporting is robust and both management and users alike have experienced tremendous value. Many thanks to AppCentrica, our Salesforce experts and trusted partner."*



**Tim Williams**

Director of Sales,  
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