



Key Achievements

- A global leader in commercial real estate financing and services now manage their customers across multiple sales channels, in a collaborative manner.
- Outlook integration provided major linkages across multiple organizations.
- They streamlined their processes for managing marketing events, and increased their ROI.

Customer Summary

With a portfolio of over \$24 billion, our client is one of the industry's leading global sources for commercial real estate financing. They integrated 20 disparate databases, allowing them to effectively manage client relationships throughout the sales process.

Real Estate professionals are committed to understanding client objectives to capture local market opportunities. Within their thorough and proven decision-making framework, they are focused on delivering flexible and innovative debt and equity solutions.

This Real Estate Company selected SalesLogix CRM to integrate disparate databases, for accounts, opportunities and contracts. Castle CRM designed and managed the system and application integration.

Success Story

Our client brings over 30 years of commitment to the North American and Europe commercial real estate market. Their system integration and application deployment of SalesLogix, by Castle CRM, provided them collaborative marketing and sales process improvements, required for more than 250 professionals in a specialized financial services' organization.

Real Estate professionals manage multi-million dollar loans, across different product lines for commercial businesses.

They identified the need for an effective, efficient CRM system that would quickly manage their sales and marketing processes, requiring little customization - with a good fit for their relationship business.

As the result, our client integrated over 20 different databases into one centralized database. This was the first time that sales and marketing were integrated.

"We were able to tell how much business was being generated and the ROI, for specific marketing campaigns".



SalesLogix brought our real estate professionals together, and helped them work as a team. "The users love it".

Outlook Integration was a huge success, and approximately 95% of the system integration was completed "out-of-the box", and was usable.

The system roll out was "quick, cost effective, with minimal customization".

Our 250 users are "very happy", and SalesLogix has provided the collaborate tool, that we required.

Customer Spotlights

Our customer's next challenge is to roll out SalesLogix into Asia.

Our customer is investigating web and mobility solutions for remote users.

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