

# Opening Doors, Closing Deals

Digital Transformation of  
Smart property management



# Smart Property Investment Sales & Advisory Services

**Urow Real Estate** is an elite, boutique investment sales firm exclusively focused on selling self-storage facilities across the US. The Florida-based business combines the sophistication of investment banking firms with the knowledge of top storage operators. It operates in the dynamic real estate industry, bridging the gap between property owners and potential buyers. Their business model relies heavily on lead generation, property evaluations, and guiding both parties through successful transactions.

Faced with the challenges of managing complex customer data, lead tracking, and sales cycles from multiple platforms, Urow Real Estate turned to DTC Force for an integrated solution. They needed a centralized system to streamline operations, enhance lead management, and provide real-time insights into property deals, all while improving internal efficiency and client satisfaction.



# Building Sales and Lead Management Systems

At the core of Urow Real Estate's challenge was the lack of a cohesive system to manage the various elements of their sales and property data. Leads were being collected from third-party systems like Yardi, making it difficult to track their source, nurture potential clients, and analyze conversion rates.

DTC Force proposed implementing Salesforce Sales Cloud, enabling Urow Real Estate to manage their entire sales process—from lead generation to deal closure—within a single platform. The new system would allow the sales team to capture client-specific data, track communications, and easily stage leads through a nurturing cycle. By incorporating custom lead sources and automation,

Urow Real Estate will gain visibility into the effectiveness of its marketing efforts. Leads could now be assigned to users for collaboration, and sales reps had the tools to track calls, emails, and meetings, creating a seamless experience from initial contact to deal closure.





# Custom Property and Opportunity Management Module

The next phase involved creating a custom property management module, allowing Urow Real Estate to track key property details such as market value, size, and location. This functionality was critical to ensuring all property data was organized and accessible within Salesforce. DTC Force also set up opportunity management, enabling the team to log new opportunities, track the progress of deals, and stage them through the sales cycle. Each opportunity could be associated with a property, allowing for a comprehensive view of both buyers and sellers within a single account.

Seamless Automations with Salesforce

# Automating Document Generation, Campaigns, & Communication Tools

Additionally, document generation tools were integrated, allowing the sales team to generate contracts and proposals with a single click. This automation reduced administrative overhead and ensured critical documents were populated with accurate data from Salesforce, streamlining the contract signing process. The solution provided Urow Real Estate full visibility into property transactions, helping them close deals faster and more efficiently.

Salesforce marketing campaign management features were implemented to further enhance their ability to engage with prospects. This allowed teams to send well-targeted emails for leads and contacts, improving their outreach strategy. By creating custom email templates and tracking campaign effectiveness, Urow could easily monitor which marketing efforts drove leads and sales.

DTC Force also carried out the integration of Salesforce Dialer and Inbox tools, which enabled users to communicate with clients more effectively. Equipped with the ability to make and receive calls directly from Salesforce, log emails, and schedule meetings, Urow Real Estate's Sales team had everything they needed to stay connected with clients seamlessly at every stage of the sales process..

Revolutionized Transformation by DTC Force

# A Centralized Hub for Growth and Efficiency

Expert recommendations by DTC Force resulted in a fully integrated Salesforce system that revolutionized Urow Real Estate's operations. By centralizing lead management, property tracking, and opportunity management, Urow Real Estate significantly improved their ability to manage data and close deals. The automated processes reduced the administrative burden on the team, allowing them to focus on nurturing relationships and driving sales.

The new system also provided Urow Real Estate with real-time insights through custom reports and dashboards, enabling better decision-making and strategy refinement. With the ability to track leads from various sources and measure the performance of marketing campaigns, Urow Real Estate now operates with greater precision and agility, and it is well-positioned for continued growth in the competitive niche of self-storage real estate.



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