Federal Capital Partners Sales Cloud Implementation

Implementing a complex set of business relationships to manage investments.

OVERVIEW

Federal Capital Partners (FCP) is a privately held real estate investment company with over $6 billion in assets. FCP invests in commercial and residential assets making equity and mezzanine investments in income-producing properties. Our work for FCP allowed the capture, tracking, and reporting of property income and purchase and sale transactions.

Key Metrics

- Eliminated the need to manually track a $2.6 billion deal management sales pipeline in Excel.
- Eliminated the need to manually track $301 million in fund closing commitments in Excel.
- Migrated nearly 6,000 Account and Contact records previously tracked in Excel and Outlook.
- Thousands of deal management calls and email activities were logged that were previously unquantifiable or trackable by management.
- 25+ internal users initially deployed on Sales Cloud.
- 438 Legal Entities initially imported that were previously tracked manually in Excel.

FCP®

HIGHERECHELON™

https://www.hesfp.com

CHALLENGES

- FCP's two distinct businesses, Deal Management and Investor Relations, operate independently with the need for specific functionality and data visibility requirements.
- Property transactions and pipeline management were conducted manually in Excel.
- Communication, tracking, and data analysis were minimal and out-of-date during the asset acquisition process across the business pipelines, geographical markets, and asset classes.
- The capability to track investor activity and documentation across funds, fund commitments, fund closings, and legal entities were disparate and noncentralized.
- There were no capabilities to report on communications and interactions with investors.

SOLUTIONS

Leveraged Salesforce Sales Cloud features to develop applications with tailored functionality to each business unit's requirements.

Single Source of Truth | **Increased Productivity** | **Advanced Analytics**

1 — Salesforce Configuration

Used a combination of standard and custom objects, standard functionality, and Sales Cloud features to support pipeline tracking and investor relations data.

2 — Streamlined Communications and Support

Implemented Salesforce mobile app and Salesforce Inbox to support better communications, and Case Management to resolve investor issues.

3 — Complex Sharing and Visibility

Use of account hierarchy to address complex relationships coupled with sharing rules, custom profiles, and page layouts to restrict data visibility.

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RESULTS

1

Single Source of Truth

Both business units can visualize, track, and report in real time, giving executives a 360° view of the business.

2

Communications Tracking

Ability to automate, track, and quantify communication for investor client services, and quickly log related details and communications.

3

On-the-Go Availability

Provides mobile functionality and time-saving enhancements to increase staff productivity.

4

Controlled Data Visibility

Standard and custom Salesforce functionality provides users with no more and no less data visibility than required

5

Streamlined Investor Relations

Provides a centralized location to log, track, and store all related activities or documents for investor commitments, fund allocation, legal entities, and fund closings.

6

Pipeline Management Across Geographies

Provides details for past opportunities tied to specific properties, even after a property name change, and visualization of related deals for accounts at local, regional, and national levels.

FCP

We brought HigherEchelon on board to help us thoughtfully and quickly implement new capabilities across our Salesforce instance.

Their expertise, especially in the private equity space, was extremely valuable.

Additionally, they were extremely responsive to our needs and requests, including being onsite to help troubleshoot development or for our production rollout to the business. They consistently worked to our schedule and scope, and delivered a product on time and within budget.

Brian Cohn – Federal Capital Partners, Director of Information Technology

Products Used

- **Sales Cloud:** Workflow and Approval Process, Mobile, Operational Analytics, Opportunity/Pipeline Management, Microsoft Integration, Sales Console
- **Service Cloud:** Case Management
- **Platform**: Custom App Development (Lightning and Javascript, reporting against custom data)
- **Lighting Migration**