



PACIFIC DATA MANAGEMENT, INC.

CUSTOMER PROFILE

The Challenge

Commercial Property Services (CPS) needed a highly specialized commercial property tracking system that would give brokers a competitive edge in their sales efforts and also allow management to forecast revenues. The system had to logically integrate all company functions into a single database that could track broker sales and commissions, maintain client contact information, and store historical and current data about every commercial property in Silicon Valley. Lastly, the system had to let users—from brokers to upper management—create and print detailed, custom reports that turned the data into a real business asset.

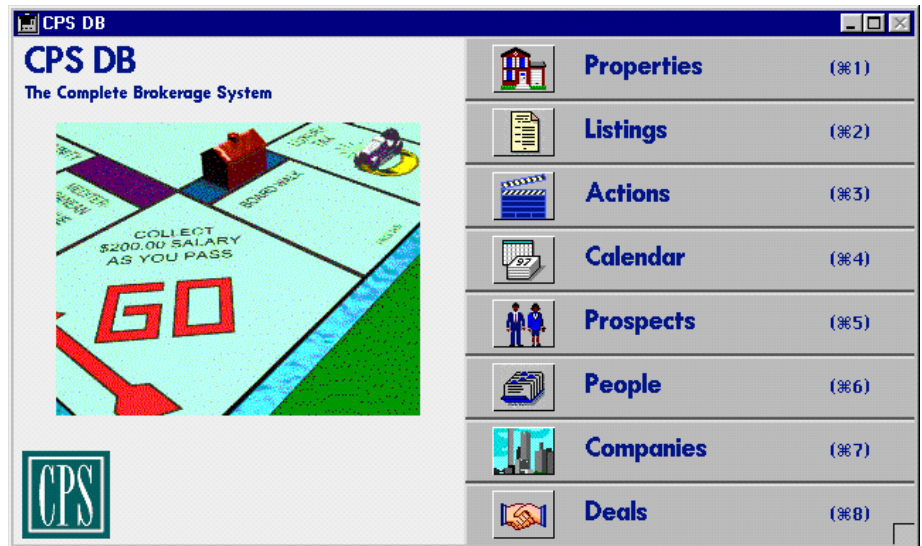
The Process

CPS previously had two separate data management systems, but neither could properly track nor relate the unique data generated by the company. Printing reports consumed hours of time, and the systems could not even analyze report data in a meaningful manner. As a result, CPS hired Pacific Data Management, which took the time to understand the company's needs before building the system. As a result, the system that PDM built was perfectly tailored to CPS' needs and provided the flexible data management that the company required to better run its business.

COMMERCIAL PROPERTY SERVICES

PACIFIC DATA MANAGEMENT

CPS is a commercial real estate firm with over 20 years' experience in the Silicon Valley. The San Jose, California company runs its business with a custom database that integrates all aspects of the business, giving CPS a competitive edge and enabling the company to provide superior service to its clients. Built by Pacific Data Management in San Jose, the multi-user database system links 40 computers and stores detailed data about more than 25,000 local properties to give CPS brokers and business managers current, accurate property and financial information.



PDM designed the interface, complete with colorful navigation buttons, to be easy for all users.

Greg Davies, President and CEO of CPS, had previously tried two computer systems, both which failed to meet the company's extensive data management needs. After hiring PDM, Davies was impressed that the technology consulting firm first took the time to understand CPS' business before building the system, resulting in immediate success. "With all the tasks that our system does, being able to build it from the ground up to do exactly what we wanted was a major accomplishment," Davies says.

PDM built the multi-user database system to track the real estate and business aspects of CPS. For the brokers, the system stores client contact data, maintains daily calendars, and tracks current and historical information about over 25,000 properties, including tenants, rent, location, and amenities. Brokers—either from the office or from a remote location—can search by any criteria to locate properties that fulfill client requests and can print maps to make visiting the sites easier. Photographs of properties are also stored, allowing brokers to print color listings for clients.

According to Davies, the vast database of information gives CPS a significant competitive advantage and enables the company to provide its clients with fast, quality service. "If we're up against other real estate firms to see which company can respond quickest, with the most comprehensive data, we win every time. With this system, nobody can beat us," states Davies.

Because the real estate transactions relate directly to the company's bottom line, CPS also uses the system as a critical business management tool. For example, the buyers are prospects whose information is stored in an easily-accessed "address book" of active companies in the market. That data is tied to the real estate listings, which are viewed as inventory items. Proposals, letters of intent, and all other documents can be printed, allowing management to review the status of deals based on historical behavior of the buyer, transaction history of the property, and related documents. "Based on all that transaction information, the system PDM built is also a revenue projection system that lets us forecast out five times longer than the previous systems, and with much more certainty," notes Davies. This centralization of data also saves management the time from having to search through paper files or ask brokers about the status of every deal.

The database stores photographs and detailed data about more than 25,000 properties.

To make sense of the volumes of data, the system prints highly customized reports of broker commissions, property transactions, terms, statistical rent forms, and quarterly newsletters containing transaction statistics. The previous systems were so slow that Market Research Manager Julie Feretti had to run these reports overnight, and even then, the reports didn't contain the comprehensive data analysis needed. "This system is very fast," Feretti says. "It takes just seconds to find and print the data, which used to take hours, if not all night. I also used to have to print about 50 reports to get the same information that I can now get onto one page." The system is so easy that users can customize the comprehensive reports by dragging and dropping, and can print any report on their own.

In fact, the employees using the system learned how to use its point-and-click interface quickly. "It's very user friendly," notes Feretti, who also adds that the brokers enjoy using it and appreciate the competitive edge it gives them.

The completed system is helping CPS grow its business, as well as provide superior service to clients. Davies attributes much of the success to PDM and the system it built. "My experience with PDM has been exceptional," Davies reports. "They are responsive, have a positive attitude, and are very knowledgeable about technology and networks. I feel very comfortable recommending them."

The Benefits

PDM met all of CPS' data management and reporting needs by developing a reliable, multi-user database that stores data about more than 25,000 properties and enables management to evaluate the status of each pending deal for easier forecasting of revenue. Highly customized reports can be printed in seconds, providing valuable analytical data about every aspect of the business. Brokers have available the most comprehensive property information, allowing them to provide better and faster service to their clients. And most importantly, clients are better served because, at the touch of a few buttons, CPS can answer all of their questions with personalized and easy-to-read information.



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