

## Managing Complex Real Estate Portfolios

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We manage a large portfolio for a real estate investment management firm, which involves several critical deadlines and frequent client communication about the status of projects. The client team needed a way to stay abreast of the deadlines and provide the client with regular project updates.



### Our Approach

We worked with the client to build a web-based platform to manage its projects, including a comprehensive list of the client's assets, critical project dates, upcoming deadlines, and key documents. The platform also gives the client team insights about the individuals within the real estate firm with whom they regularly interact.

### The Outcome

Each team member working on the client's projects has current knowledge of the status of each project and a clear understanding of what is important to the client. This helps ensure consistent service, increases transparency, and reduces relationship friction.