# velocity

CASE STUDY

# CBRE

## CLIENT KNOWLEDGE CENTRE

## PROPERTY MANAGEMENT

## OVERVIEW

Due to a period of rapid growth, the need to find an alternative solution to address the accessibility and scalability issues of their existing Client Knowledge Center led CBRE to Velocity.

A main requirement was to provide the client care programme's account directors and data analysists with an application where all the client data was consolidated and easy to work with.

The solution provided sources data from multiple disparate sources, is totally transparent for users and accessible from both desktop and mobile devices. Users now have an accurate view of clients whic improves decision making and projects professionalism to CBRE clients.

## PROBLEM

CBRE relied on a Client Knowledge Center formed of a combination of Microsoft Office documents uploaded and stored onto a SharePoint site. Accessibility problems and manual processes caused difficulties in aggregating data and presenting accurate client information to account managers. These manual processes presented scalability issues that meant creating and updating data for a larger number of clients became inefficient and was very time consuming.

"If you had fifty clients you had to put together fifty Word documents, fifty Excel documents and fifty PowerPoint documents and update each of those for each quarter and each year when you had changes to your information," explains Tom Pellegrini, Managing Director at CBRE.

"All the data [aggregation] was manual, it was hard to access and it was very un-scalable, both for consulting the data and putting it together."

## SOLUTION

Upon experiencing a period of rapid growth, CBRE understood the need to find an alternative solution to address the accessibility and scalability issues of their existing Client Knowledge Center. A key requirement was to equip the client care programme's account directors and data analysts with an online application where all the client data was in one place, easy to work with and that made data manipulation easy.

"The main reason was to drive greater accessibility for our users so that they could access information and see it all in one place and not have to look in multiple locations to find it," Tom confirms.

CBRE found an answer upon discovering K2's offering, although soon realised that they required assistance developing and implementing a solution that would fully fulfil their requirements. This is when they turned to Velocity for an answer.

Arno van Rooyen, Managing Director of Velocity explains, "The solution we provided sources data from multiple disparate sources. This is totally transparent for those using the new Client Knowledge Center and they just log in using their desktop or mobile device and find their data in one central place. Furthermore, this solution ensures data consistency across the board and provides a single source of truth for CBRE account directors and data analysts. Everybody now has an accurate view of clients, and this promotes good decision making and projects professionalism to CBRE clients"

## BENEFITS

With Velocity's K2 solution, information from various data sources is now consolidated in one place and accessible using desktop, mobile and tablet devices. This means account directors and data analysts in the client care programme can now access and manipulate client data with greater ease and transparency. This gives users greater confidence in the Client Knowledge Center and ultimately allows for improved customer care and, in turn, increased customer value.

From a technical perspective, this solution leverages data connectors to surface data from various data sources, including Salesforce.com, to an online application configured using K2. Data from additional backend systems can easily be integrated into the application as well. The flexible design and robust architecture promotes easy adaptability and scalability, and can therefore be successfully rolled out globally to the APAC and EMEA regions.

"It gives us the understanding that we can create a robust Client Knowledge Centre and that we can achieve our desired goal of locating all our client knowledge in one place, which can be scalable not just to one programme, but to multiple programmes around the globe," adds Tom.

## VELOCITY-K2 PERTNERSHIP

"I first saw the K2 solution that was being used for the property performance KPIs and right away knew what it could do for our Client Knowledge Center. I think Velocity is probably unique in the world at taking this technology and making it work the way they do" explains Tom.

The combination of a proven K2 delivery methodology, good communication, excellent technical project management and leveraging K2 resulted in a solution that met and exceeded the client's requirements.

"Velocity's strength is to take what we visualise as a solution and configure it in K2 in a way that no one else has been able to do in order to match the solution," Tom confirms. "What they've been able to do is take something from a conceptual viewpoint and stretch the K2 technology to make it work."

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## CONCLUSION

"We're a very demanding client because of the industry we're in and I think Velocity has been able to work with us very well and flexibly within our demand. They have been able to create solutions that are really elegant and really beautiful, that have met all of our needs and have allowed us to scale globally, when we really couldn't even scale locally before working with Velocity on the solution," says Tom.

What CBRE now has is a single comprehensive client knowledge platform, where all client data is neatly displayed and managed on one centralised dashboard, resulting in higher levels of productivity and better customer care.

"They have done an incredible job. They've built an incredible solution. I don't think anybody could have built a solution in the time and the cost parameters the way Velocity has," concludes Tom.

## ABOUT CBRE

CBRE Group, Inc. is the world's largest commercial real estate services and investment firm, with 2016 revenues of $13.1 billion and more than 75,000 employees (excluding affiliate offices). CBRE has been included in the Fortune 500 since 2008, ranking #259 in 2016. It also has been voted the industry's top brand by the Lipsey Company for 16 consecutive years, and has been named one of Fortune's "Most Admired Companies" in the real estate sector for five years in a row.

(Source: www.cbre.com)

## velocity

Velocity is a professional services company that designs and develops software applications using K2, SharePoint and Microsoft .NET technologies. Our software solutions enable organisations to significantly increase their responsiveness to customers, provide a higher standard of service, gain a competitive advantage and better manage and grow their business.

### UNITED KINGDOM
Technology House,
151 Silbury Boulevard
Milton Keynes, MK9 1LH
+44 (0) 1908 545 770
contact-uk@velocity-it.com

### SOUTH AFRICA
3rd Floor Steven House,
Brooklyn Bridge Office Park,
570 Fehrsen Street
Brooklyn, Pretoria, 0181
+27 (0) 12 433 6312
contact-sa@velocity-it.com

### INDIA
No 205, 3rd Floor, S A Arcade,
24th Main JP Nagar 5th Phase,
Bangalore, 560 078
+91 (0) 80 4850 8203
contact-india@velocity-it.com

www.velocity-it.com