

Data investment pays off in client satisfaction

Investor Management Services, LLC (IMS) provides commercial real estate owners and operators with a software solution focused on managing their assets and investors more efficiently.

IMS' platform allows its customers to attract and maintain an investor base with tools that seamlessly manage the entire investment process, from originating and processing deals online, to storing and managing all required documents.

As IMS continued to build on its platform, they saw a twofold opportunity:

- ▶ an internal tool that would allow customers to access and analyze information about their investor base more efficiently with an eye towards improving sales
- ▶ an external platform that would allow customers to market to their investor base by easily communicating information such as returns on investments and additional investment opportunities.

Investor Satisfaction

IMS engaged Icimo Analytics by Cherry Bekaert to create Tableau dashboards to support these opportunities. According to Robert Cox, Chief Technology Officer, the first goal was to make it very easy for customers to answer questions such as "where are my investors coming from" or "where can I find the most appropriate investors for a particular project."

"Consider a client with an investor base of 100," Robert said. "Given the complexity of the commercial real estate business, they may have had upwards of 700 spreadsheets with various types of information about investors, current projects or future investment opportunities.

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In January 2020 Icimo was acquired by Cherry Bekaert.



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The external tool was created to promote investor satisfaction. Investors can now use Tableau dashboards to access a summary of their current investments, all pertinent documents, returns on investment and distribution activity.

"To our customers, the satisfaction of their investor base is imperative," Robert said. "Investors can access Tableau independently and view this information with a couple clicks of the mouse. In the past, they would have to wait up to a couple of months to receive standard reporting."

Client Feedback

"Icimo Analytics' knowledge base is outstanding," Robert said. "As we looked at other BI tools in the marketplace, we quickly determined that Tableau was our best solution, and that Icimo Analytics was the best partner for us. The dashboards we are now able to create for our customers are simply on a different level."

