Real estate agency sold on **Nintex for process automation**

SOHO Realty brings on Nintex Partner, Optimum, to improve its agent and client experience with digital process automation.

Organization

SOHO Realty, Inc

Website

www.sohorealty.net

Industry

Real estate

Country

United States

Business situation

SOHO Realty needed a customized Marketing and Sales Automation solution to enable its agents and customers to efficiently collaborate while ensuring that all sales process steps and procedures are properly executed, and documents are stored in the appropriate company document repositories.

Solution

The agency brought on Optimum, to create a custom CRM, digitize paper forms, and automate sales and marketing processes using the Nintex Platform.

Benefits

Increased visibility into status of documents and processes

Easier task assignment and management capabilities

More time to spend on helping customers

Ability to fast-track the sales cycle from leads to closing

Improving the home buying process with a customer-first approach

Selling or purchasing a home is no simple process. It involves countless forms, documents and communications with multiple parties – inspectors, appraisers, title vendors, and more. Sharlene Mercier, owner and founder of SOHO Realty, wanted to make this process less complicated and easier for her customers to navigate.

SOHO Realty is full-service boutique real estate brokerage. The agency is focused on helping its clients, who are mostly first-time buyers, achieve their real estate goals. Its sales agents work with buyers and sellers in the Houston and Atlanta markets.

Sharlene brought on Optimum, a modern software and digital solutions consulting firm, to develop a customized solution that would ease the paperwork and documentation processes for her clients and streamline the home buying experience.

"The process of purchasing a home is already challenging enough without all the required paperwork. We wanted to ease the documentation process for our clients and improve their home buying experience," says Sharlene.

Partner:

OPTIMUM™
MODERN SOFTWARE SOLUTIONS

Nintex + dotloop delivers SOHO Realty complete solution

SOHO Realty was already using dotloop, a transaction management tool for real estate brokerages, to manage its electronic signature and other documentation needs – but it wasn't a complete solution. SOHO Realty needed help automating the delivery of documents and tracking the status of tasks in the home buying and selling process. Additionally, SOHO Realty strived to better manage its incoming leads, from both buyers and sellers, and ensure proper and fast follow ups.

Using Nintex for Office 365, Optimum created a customized CRM for SOHO Realty that was centered around the way SOHO operates. The solution utilized one advanced and fully customized Nintex Forms and three Nintex Workflows, with in-direct integration to SOHO's dotloop tenant.

Optimum's Nintex solution starts with the agency's online inquiries webform. Once completed and submitted, the information is added to SOHO Realty's CRM which triggers a Nintex Workflow that notifies a SOHO Realty sales rep to follow up with the lead. The sales rep follows up with the customer and collects more information, entering the information into the Nintex Form.

Next, the sales rep qualifies or disqualifies the lead. If qualified, the customer is assigned to an agent, which is notified via the Nintex Workflow. As the sales journey progressed, the agent continues to use the Nintex Form to collect more information and if applicable kicks off a workflow to add the buying or selling and other legal documents to dotloop. Customer information is also automatically prepopulated into the applicable documents in dotloop based on what information has already been collected.

"By providing a more streamlined experience with Nintex, we're able to ease the documentation process for our clients. Optimum helped us to develop a digitized solution to our customer experience and documentation requirements that is aligned with the way we do business."

— **Sharlene Mercier**, owner and founder of SOHO Realty

Better service, visibility, and management

As documents are signed and completed in dotloop, Nintex kicks off a workflow to deliver them to the applicable parties and the agent is notified through a workflow to continue the process. Additionally, the agent can track the status of every step in the process from Nintex.

The Nintex solution built by Optimum helps SOHO Realty improve the overall experience of buying and selling a home. Thanks to workflow automation, SOHO Realty staff have better visibility into the status of documents and easier task management and assignment, giving them more time to spend on helping their customers.

About Optimum

Optimum is a modern Software Solutions and Services firm, transforming businesses through the power of People, Technology, and Automated Processes. Optimum helps organizations gain competitive advantage, and drive digital transformation by employing strategic planning, innovative technologies, and streamlined processes to deliver robust solutions and amazing client experiences!

Optimum offers a full suite of services and solutions, including Custom Software Design and Development, Business Advisory Services, Process Automation, Intelligence and Analytics, Streamlined Work and Collaboration, and Staff Augmentation through IT Project Management and Business Analysis. Learn more by visiting www.optimumcs.com

About Nintex

Nintex is the global standard for process management and automation. Today more than 8,000 public and private sector clients across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes. Learn more by visiting **www.nintex.com** and experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA).

Product or service names mentioned herein may be the trademarks of their respective owners.