



A better way to manage your data



## SUCCESS STORY: NAI 1st Valley

# NAI 1st Valley

### Company

NAI 1st Valley is one of New Mexico's largest Commercial Real Estate firms. It delivers a complete portfolio of commercial real estate services that includes consulting, brokerage, property management, and maintenance.

### Industry

Commercial Real Estate

### Application

Customer Relationship Management

### Summary

NAI 1st Valley deployed TrackVia as a customer relationship management system with compelling results:

**Business Impact:** Dramatically improve service levels provided to clients and their properties

**ROI:** Approximately 87% cost savings versus a real estate database system

**Payback:** 2 days

### Challenge

NAI 1st Valley is one of New Mexico's largest Commercial Real Estate firms. It delivers a complete portfolio of commercial real estate services that includes consulting, brokerage, property management, and maintenance.

As Marketing Coordinator at NAI 1st Valley, Roz Mitchell, was frustrated with using ACT to manage the client list of a busy commercial real estate brokerage, and discovered that listings were not being tracked in the most efficient manner. There were multiple pieces of paper being used to track listings leading to the occasional misplaced listing. Furthermore, it was difficult to search and find records with over 6,000 clients because all names had to be spelled exactly right to find the appropriate record. It was time for a better data management solution.

### Solution

One option explored was a real estate database system with an initial investment cost of \$20,000. "This cost did not even include ongoing maintenance or phone support," says Mitchell. "I knew there had to be a more affordable and better database option out there."

Mitchell discovered TrackVia over a year and a half ago and data management has never been the same at NAI 1st Valley. "When I first came across TrackVia, I knew this was the solution for me. It was refreshing to come across a database that I could not only learn quickly with limited IT knowledge but also get up and running in no time," says Mitchell. "I immediately saw the potential in TrackVia. It was obvious that a database so customizable could be implemented in just about every facet of our office."

Collect  
Organize  
Share

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*“TrackVia has become the backbone of our office. Each piece of information essential to managing our listings and our client relationships is handled by TrackVia. From our client database to our property listings, html emails and lease tracking, TrackVia handles it all with ease.”*

—Roz Mitchell,  
Marketing Coordinator

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Initially, Mitchell created a custom properties database for the team that allowed NAI brokers to upload photos of properties and brochures along with relevant property information such as the address and square footage. Through the use of filtered views, Mitchell has set up a distribution schedule within TrackVia to automatically send her a daily report of all properties set to expire within the next two weeks. She has also set up a weekly report to run and be distributed to all brokers that features the current active property listing. Using TrackVia to keep a current list of properties has other advantages as well. Mitchell states, “TrackVia has virtually eliminated our need for a VPN. Brokers can access property information and brochures from anywhere with an internet connection, no matter what time of day.”

### Benefits

Since creating this first database, Mitchell has continued to find new ways to make her and the brokers’ lives easier and more efficient with TrackVia. Brokers no longer manually initiate listings. All listings are now submitted into TrackVia via a customized web form with listings automatically populated in a TrackVia database. “Brokers have found the system very user friendly, and there was little if any learning curve in getting them to adopt and use TrackVia,” says Mitchell. Brokers and Mitchell find the search functionality within TrackVia one of its most powerful features. When searching for a listing or client, a user only needs to input part of the name and all results will be immediately displayed that contain a match.

Finding comparables in the real estate market can be a challenge, and Mitchell is using TrackVia to build a comps database so NAI 1st Valley will have a readily accessible listing of comps at its disposal. TrackVia has truly become a valuable data solution for NAI 1st Valley. In addition to tracking listings, Mitchell has also created a contact management database for mailing lists and labels. This has saved a lot of time in preparing and sending out tailored marketing communications to NAI’s clients.

