

PHILLIPS EDISON & COMPANY

Phillips Edison & Company is a fully-integrated retail real estate company with a portfolio of more than 25 million square feet of neighborhood shopping centers across the country. Its primary mission is purchasing under-performing, grocery-anchored properties and maximizing their value through hands-on leasing, management, and redevelopment.

“I had used databases in the past but had never set one up. Despite my inexperience, I was able to get TrackVia up and running in two days and actually had fun doing it. TrackVia is so intuitive that I was able to setup my database, forms, and views without reading a bunch of materials or taking a training course. Management and other departments have requested access to TrackVia once they saw how simple and powerful it is.”

**Denise Dyer**  
Litigation Manager  
Phillips Edison

## Summary

Phillips Edison & Company deployed TrackVia to manage its litigation workflow across its 250+ commercial properties across the US. The results have been an unqualified success for the company. TrackVia substantially improved the litigation manager's ability to proactively manage litigation matters.

## Challenge

Phillips Edison & Company is a fully-integrated retail real estate company which owns and operates over 250 neighborhood shopping centers. With so many properties under management, contractually enforcing leases is a critically important part of the business. When the company must take legal action, it turns to Denise Dyer, Litigation Manager, who is responsible for managing litigation matters for the entire portfolio. Dyer depends on a network of 30 outside law firms to execute the litigation across the 50 United States. When Dyer assumed the role, she inherited a rudimentary system for tracking cases – a series of spreadsheets – that presented the following challenges:

- » Spreadsheets limit the amount and type of data that users can input, so valuable information such as e-mails with outside firms could not be captured
- » Searching through various spreadsheets, each with various tabs, to obtain information for management or outside law firms was cumbersome and highly inefficient – in Dyer's words, “Search was painful.”
- » Preparing management reports and litigation packages (sent to outside law firms to ready them for their cases) was manual and time consuming

Given these challenges along with the knowledge that the number of defaults would increase dramatically in the near future due to the downturn in the economy, Dyer decided to replace the labyrinth of spreadsheets with an automated system capable of streamlining litigation workflow and internal / external communications.

## Solution

Dyer was already familiar with traditional databases such as Microsoft Access and knew that they are neither simple to use nor easy to share. According to her, “I have used Access in the past but never liked it because I couldn't move around the data easily and validate its accuracy. Plus, it would require too much training, and perhaps bringing in a consultant, to get it up and running.” Dyer also considered litigation workflow software but concluded that these solutions, in addition to being overbuilt and complex, are very expensive. Dyer would have needed “months to get the budget approved to purchase such a software package.”

TrackVia OnLine Database  
Professional Edition



The best solution for Dyer was TrackVia's OnLine Database Professional Edition because of its robust functionality, ease of use, and cost effectiveness.

The industry leading online database allows her to accomplish the following in managing litigation matters:

- » Setup the database, define the workflow, and import the data in two days – without help from IT or external consultants
- » Summarize all the data about a case into an automatically generated cover sheet that gets sent to a law firm, along with other documents, when they get assigned a case
- » Define a dashboard of views and reports that is used throughout the day to search for litigation matters and update their status based on dialogue with outside law firms
- » Easily cut and paste text from email dialogue with outside law firms pertinent to tracking the history of a specific case
- » Provide access to other departments inside Phillips Edison – such as leasing, lease administration, and collections – that need to know the status of litigation matters

With TrackVia, Dyer was able to completely remake the litigation management workflow and has been able to withstand the tremendous growth in litigation matters that has ensued over time.

## Benefits

Implementing TrackVia to manage its litigation workflow and communicate status to management and a nationwide network of law firms has been an unqualified success for Phillips Edison & Company. TrackVia enables Denise Dyer to manage litigation matters across 30 law firms, 50 states, and 250+ properties.

Dyer simply would not have been able to keep up with the growth in lease defaults due to the struggling economy without the efficiency gains afforded by TrackVia. TrackVia saves Dyers an estimated 20 hours per month. TrackVia paid for itself in less than a week.

Dyers says, “I don’t know what I’d do without TrackVia.” Other departments have seen the power, simplicity, and affordability of TrackVia and have requested and been granted access to the service.

## About TrackVia

TrackVia delivers the world’s most secure, flexible, and scalable OnLine Database and Application-Building Platform designed for Business Users. TrackVia balances business-user empowerment with enterprise-class performance, scalability, and end-to-end security. The result: A data management and collaboration solution that even the most skeptical Internal IT organizations can champion. To-date, over 1000 customers across the globe rely on TrackVia, including ADP, Healthways, US State Department, the TSA, US Olympic Committee, Samsung, and US Cellular.

“I don’t know what I’d do without TrackVia.”

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