

Carasso Real Estate Successfully Implemented a Cross-Departmental Salesforce-based Customer Service System, Boosting Efficiency and Sales

About Carasso Real Estate

Established in 1933, The Carasso Group is one of the longest-standing real estate companies in Israel. A leader in Israel's construction industry, Carasso has a strong financial backbone that supports diverse and extensive entrepreneurship in various fields of real estate. The company's activities include residential real estate, and development and management of rental property and commercial projects across the country. Carasso is a leading developer of boutique residences and large-scale neighborhoods in high-demand areas, with a significant focus on urban renewal. The company's comprehensive activity in high-yield real estate includes the development of local shopping centers, office towers, employment and industrial zones, as well as properties serving the knowledge intensive industry.

Carasso Real Estate is undergoing continued growth, with an emphasis on creativity, community and building aspirational lifestyles for its customer base, while ensuring the highest quality in planning and construction, integrity, and the provision of service excellence. These principles and values are imbued in every aspect of the company's operations by its dedicated, attentive and professional management and staff.

The Need

Carasso Real Estate was operating on three separate systems. The capability to connect data between these systems was difficult, if not impossible.

The needs of the company included:

Maximizing sales opportunities: Operating three separate systems was a significant barrier to the company's ability to leverage data and take advantage of business growth opportunities. Despite many sales inquiries received at Carasso, it was found that less than 1% led to successfully closed deals. In order to increase the rate of transactions and sales, it would be necessary to manage the processes in a more structured and effective way.

Accessibility for the sales team: One of the challenges at Carasso is ensuring that the sales team, who are mostly outsourced, could all have access to the system. There was a need to make the customer management system user-friendly and accessible, and ensure that it facilitated fast data retrieval. The system must also support a uniform language and organized, digital management of sales processes for the entire team.

Changing the organizational culture: There was a need to shift from a decentralized organizational structure made up of several information systems to a centralized, holistic system that would ensure compatibility of proposals and documents for specific clients. This demanded a change in the culture of knowledge sharing and data sharing in the company.

In order to drive sales, investments and repeat custom, Carasso's VP Marketing Michal Glick and the marketing team understood that in-depth familiarity with customers is essential. A uniform customer management system that connects various departments and enables accurate cross-team data analysis was required. It should also provide the capabilities to offer additional products as well as ongoing management of both customers and investors.

The Solution

Carasso Real Estate was looking for a reliable and expert partner to undertake the journey to consolidate all the data in the separate systems, including marketing, sales and finance, under one technological umbrella. The decision was made to go with AllCloud, the Salesforce experts with extensive experience in the implementation of complex CRM systems and Salesforce-based strategies. Importantly, AllCloud also demonstrated profound understanding of Carasso's needs and vision.

The collaboration began with an in-depth study of the Carasso organization by the AllCloud team. As a result, it became clear that the correct course of action was a parallel implementation of Salesforce's Sales Cloud, Marketing Cloud and Service Cloud, as well as implementation of a Datorama-based BI system. This would enable the development of optimal customer journeys, while assuring the ideal experience for end users.

In the first (and most challenging) phase of the project, the sales processes were defined:

Establishing what constitutes a lead and how to properly manage the lead

Management of opportunities

Defining, optimizing and improving processes

The second phase focused on defining the marketing processes, in light of the knowledge that there is a significant gap in the generated leads compared to closed deals.

It began with defining the communication management processes, and then working to improve their efficiency and support sales completion.

In addition to the Salesforce Marketing Cloud, a BI-based Datorama system was implemented, connecting all the touchpoints and enabling a complete view for data analysis, including customer data, cost data and scheduling.

At the same time, implementation of the Salesforce Service Cloud was carried out, enabling post-sales customer support, including those involving third-party providers outside of Carasso Real Estate.

The Results

After the Salesforce implementation, the conversion rate from lead to closed deal improved by 15%, successfully achieving one of the main goals of the project.

The comprehensive process of defining and integrating Salesforce across the organization's departments constituted a significant improvement in the company's strategic vision. The system enables efficient management of one unified database, which can be used by the finance department and scaled to other departments in the future as needed. As a result, significant savings in resources and time were also realized.

The Salesforce system enables access to comprehensive real-time data about customers, business opportunities and closed deals, internally and in the customer-facing interface. This also ensured a positive experience for customers, making information accessible to them at all times and with maximum transparency.

Today, Carasso team members can access large amounts of customer data relatively quickly, and issue reports and implement strategies at an organizational level more efficiently than ever before.

During times of economic instability, the capability to manage leads efficiently, build optimized customer journeys, leverage relevant data and respond agilely to customer inquiries is critical to an organization's success. With AllCloud's implementation of the cross-organizational Salesforce system, the ability to generate reports at the click of a button helps to significantly save time and resources, and leverage customer and transactional data to create a pool of high-potential existing and returning customers.

Today, the integrated system is accessible to the entire sales team, providing a holistic, up-to-date picture of the entire customer base. Importantly, this includes projects that involve parties outside of Carasso Real Estate, increasing potential sales opportunities to the maximum.

The journey is not over, and the Salesforce implementation continues to evolve, for example, with plans to integrate Community Cloud.

Future Vision

Carasso Real Estate is focused on long-term initiatives, including the development of a personal customer area to support rapid digital response, which will deliver significant added value and a competitive edge. The capability to present the client with all transactional data, even in areas not under the direct responsibility of Carasso (ie. contractors and/or other business partners), will greatly enhance transparency, clarity and trust. The goal of integrating with contracts systems and money transfer systems is another key vision of Carasso. The company is already conducting regular surveys among its clientele in order to identify strengths and weaknesses in post-sale processes, to improve as needed and assure customer satisfaction. All this will be carried out in cooperation with AllCloud, Carasso's trusted partner.

"The collaboration with AllCloud was instrumental in achieving the strategic goal of implementing Salesforce in the organization. We wanted to move several steps forward in a relatively short time. In defining the processes, AllCloud supported a significant improvement in the company's strategic vision. Throughout the entire process, AllCloud was our professional partner. From the account manager, to project managers and engineers, the AllCloud team was highly professional and accessible at all times, constantly committed to service excellence. We were looking for a long-term partner who could continue with us to maximize the system's capabilities. AllCloud definitely meets this criteria, and proved it every step of the way."

Michal Glueck, Vice President of Marketing, Carasso Real Estate