

## **AFI Properties leverages Workato to streamline business processes and support company growth**

**AFI Properties, a leading real estate investment company turns to AllCloud to implement Salesforce and Workato, maximizing the efficiency of cross-organizational processes and expanding business activity to new markets.**

### **About AFI Properties**

Founded in 1971, AFI Properties Ltd. is a leading real estate investment company specializing in yield-earning assets. The company has been publicly traded on the TASE since 2004. Today, AFI Properties operates in Israel and around the world, marketing tangible assets to a wide clientele. After many years servicing business clients, the company has recently expanded its operations to private individuals.

### **The Challenge**

The real estate market in which AFI Properties operates is extremely competitive. The ability to manage and control organizational data in an efficient, centralized way is critical. At the same time, the company must maintain data security at the highest level, in order to protect sensitive financial information and comply with strict industry regulations.

After entering the B2C market, and the expansion of activities in more countries, the volume of transactions and their frequency increased significantly. This has impacted all organizational processes, demanding faster response times on a continually growing number of transactions, based on vast amounts of data and the need for accessibility to that data in real time.

### **The Solution**

Already very active in the B2B real estate market, AFI Properties entered the B2C real estate consumer market, including short term rentals, and also expanded operations to additional countries. This involved the addition of thousands of properties to the company's already large portfolio. To support this growth, the Information Systems team called on AllCloud to implement Salesforce CRM, providing the capability to handle thousands of new customers with maximum control, speed and efficiency.

With the significant increase in data volume due to invoices issued for thousands of properties every month all over the world, it was clearly no longer possible to rely on manual processes. The next step was to interface Salesforce with the ERP and billing systems, and leverage smart automations and integrations to streamline operations and transactions, and create a transparent and accessible data flow that connected the sales team, collection team and end customers. The goal was to ensure that all financial data across the organization would be displayed in Salesforce and also accessible via mobile app to the tenants themselves.

After reviewing the options on the market, Shira Baum, CIO at AFI Properties, chose Workato, a best-of-breed workflow integration and automation tool, as the ideal solution.

## The Results

By implementing Workato, AFI Properties boosted the efficiency of its organizational processes, connected on-prem SB1 systems with the Salesforce, cloud based CRM, and is now more effectively utilizing a wide range of resources while lowering costs and maximizing operations across the organization.

As time goes by, more processes are integrated and more capabilities of Workato are discovered and leveraged. Workato implementation has opened new worlds of possibilities, and the AFI Properties team, led by Shira Baum, continually develops new processes that Workato responds to. For example, one of those processes is interfacing with an external expense management system; currently, someone has to manually enter the data into the financial systems, however this will soon change, thanks to Workato. The goal is to integrate with even more external systems, and implement additional processes in stages, based on the priorities of the AFI Properties team.

## The Future

*"My aim is to optimize as many processes as possible, and integrate and automate other systems that our organization relies on. This is what we need to keep up with the global, dynamic and competitive real estate investment industry. After our successful collaboration implementing Salesforce and Workato, we see AllCloud as our partner who consistently delivers professional, fast and expert service. We look forward to continued collaboration and to achieving our business goals together."* **Shira Baum, CIO, AFI Properties**

