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Colliers Wisconsin elevates its commercial real estate services with automation and dashboards in Smartsheet

With Smartsheet, Colliers Wisconsin can automate internal and client-facing processes, saving time that can be spent delivering world-class commercial real estate services.

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One of the biggest benefits is the ability to have everything in one spot, and to visualize that information... It really allows you to compare things apples-to-apples, as opposed to across different portfolios. Whether it's a marketing campaign or something completely different, you know that the rollup is going to look the same regardless of which project you're working on. By visualizing it that way, I'm able to see errors or missing information, things that I wouldn't have otherwise.

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Maggie Blair, Director of Marketing and Research, Colliers Wisconsin

Customer:
Colliers Wisconsin

Industry:
Architecture, Construction and Engineering

Organization Size:
Enterprise (10,000+ employees)

Region:
North America

Website:
colliers.com/en/united-states/cities/milwaukee

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Colliers International Wisconsin is an affiliate of Colliers International, a leading real estate professional services and investment management company.

Background

The Wisconsin office of Colliers International has one primary goal: To provide full-service commercial real estate expertise to its clients, from brokerage and property management to investor services. The company's integrated services offering depends on not just responding to but understanding and anticipating client needs. Smartsheet helps Colliers Wisconsin deliver best-in-class service even in the face of unexpected challenges.

Solution

"Being full-service, one of our goals is to have information talking across different departments, so everyone has the same information," says Maggie Blair, director of marketing and research, Colliers Wisconsin. *"I think that's become increasingly important as we are not all in one office together during a full week. People are moving quickly; things change really rapidly. So the question is how we make sure that that information is accurate, transparent and the same regardless of who's looking at it, where they're looking at it and how they're utilizing it."*

Blair says commercial real estate has not traditionally been a leader in technology adoption and implementation. Colliers Wisconsin has been using Smartsheet since 2012 to simplify, automate and accelerate a variety of business activities so its experts are free to focus on clients' evolving needs.

"Smartsheet helps us package a real estate portfolio and present it in a compelling manner so that the information is correct and easier to visualize," Blair says. *"From a marketing standpoint, we have our back-end dashboards to manage all of our listings, our email campaigns, and what websites a certain property is listed on. We can have status updates, meeting agendas — as much information in one spot as possible, so our team can get everything they need about that property from one spot."*

A streamlined project process that can scale as teams grow

Colliers Wisconsin uses Smartsheet to automate and streamline a variety of processes, ensuring a single source of accurate, up-to-date information across teams that can be securely accessed from anywhere. Before joining Colliers, Blair had never used the

Customer:
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Maggie Blair, Director of Marketing and Research, Colliers Wisconsin

platform, but quickly gained the ability to build new solutions to support research and marketing; today one of her duties is to oversee the organization's Smartsheet processes. One of the most important solutions in place is a request form that funnels all incoming project work into a single sheet for Blair to sort and delegate.

"We have an intake form that anyone internally can fill out to request different types of projects," Blair says. *"We have email campaigns, property brochures, or custom websites; really, anything from a simple research or analytics request to full marketing collateral. It all funnels in through one form, which makes it a lot easier to track. It used to be pretty simple, when people knew exactly who to go to because there were only a few of us. Now that we've been growing, it's one point where people can request whatever they need, and they don't have to worry whether they're emailing the right person. I manage that on the back end."*

Because Smartsheet integrates with Adobe Creative Suite, Blair and her team can manage review and proofing of marketing content within the solution, saving time on feedback and updates — and keeping large files out of the team's email inboxes. The solution not only cuts time and effort out of content creation but accelerates the integration of new hires.

"Our intake process and project tracking within my team became a really good training tool, which I didn't expect," Blair says. *"As I onboarded new team members, it was easy for me to see what they were working on and what was holding them up. I didn't have to email them to say, 'Hey, do you have enough to do?' I could just jump into their project tracker and see what they were working on. If they had a draft ready to go, I would get notified immediately; I could add my three or four comments and they were able to address it. It was a really easy way to collaborate and teach as I was doing that."*

In addition to marketing, Colliers Wisconsin uses Smartsheet for project management, construction, client service, employee reviews, reimbursements, business planning, meeting agendas, and more. One solution that uses automation to cut effort and frustration out of a process is the system for quarterly goal-setting. Previously, managers had to reach out to their reports to remind them of the upcoming deadline for goal-setting and ask whether goals had been completed. Now a central sheet prompts employees to set their goal and then sends out reminders 60 days, 30 days, and immediately before the quarterly deadline, with a link to a form so it's easy to check off progress with just a few clicks.

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Maggie Blair

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More meaningful visualizations of a single source of data

Blair says dashboards have made client briefings more compelling by providing ways to visualize data in a more meaningful way than in a spreadsheet format. They also help organize internal resources such as links to project forms or process guidelines. By collecting related assets in one place, dashboards eliminate problems with multiple versions or questions about whether an item is up to date.

"We have a ton of information; it's our most powerful asset," Blair says. *"Dashboards help us leverage that information so we can use it both for our own knowledge and with our clients. They let us visualize data in a different way and share that information with our clients in a compelling manner. The type of dashboard will change depending on who the audience is, but by making it web-based and automatically updated, we're saving ourselves time and we're able to do that at larger scales."*

Blair says that flexibility and central collection of key data and KPIs make Smartsheet a powerful tool to accelerate a company's growth and efficiency. Even for small tasks, she says, the automation capabilities can save significant time; each streamlined process adds up to greater productivity for a team or a full organization. And because the platform can scale for growth and enable seamless delegation, solutions developed for a small team will continue to bring time savings and simplification for a larger group and a longer, more complex task list.

"I wear a few different hats," Blair says. *"If we hadn't been able to figure out a way to put this information in a platform that multiple people can keep updated and ensure that it's accurate, I wouldn't be able to wear as many hats, because I would have to focus on one thing or another. I also wouldn't have been able to effectively grow the team, because there would have been too much duplication and it wouldn't have been efficient. Smartsheet has allowed us to organically grow, both in our efficiency and also in the output that we're able to turn around."*

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