

ABOUT THE ORGANIZATION

Red Door Company was created in 2006 to make owning investment real estate easy and profitable. They are not traditional property managers. They are investment managers. Everything they do is designed to meet two goals: To minimize loss and maximize return. They accomplish these goals by focusing their energy on the tenants' experience. The company principals have more than 35 years combined experience managing properties and more than 20 years' experience as attorneys in management-related practice areas.

Red Door Company provides property management services for landlord clients. Red Door helps these landlords find prospective tenants, negotiate leases with prospective tenants, and manage the ongoing lease arrangements during the lease term. They manage everything from maintenance issues and accounting issues to assist with the move out and final accounting for that tenant at the end of the lease term.

CHALLENGE

Red Door Company was looking for a product to help them manage their customer relationships. The organization was working out of their Microsoft Outlook email inboxes and using it as their customer relations management tool. As their business grew, the team at Red Door was struggling with managing the volume of emails they had coming in and requests weren't getting answered in a timely fashion. It was becoming difficult to manage their customer relationships efficiently and to market their business effectively. Leads were sometimes falling through the cracks because they didn't have an effective way to track who was following up with each lead. The Red Door team realized that they needed to find a new solution that could meet their sales, marketing, and customer service needs. After researching solutions, Red Door decided that Microsoft Dynamics CRM was the right fit for their business needs.

"Everything that we do is designed to make our tenants experience the best possible. From the technology that we adopt, the processes that we develop, the people that we hire—this is all designed to make sure our tenants have the best experience possible," says Todd Crenshaw, President of Red Door Company. "We needed somewhere to warehouse our data so we could mine it to make better decisions, develop better processes, and improve our services. The knowledge that we weren't doing the best job that we could to serve our landlords and tenants, was the primary impetus for us looking to adopt Microsoft Dynamics CRM as our client relations management platform."

Red Door needed a partner to help them implement and design their Microsoft Dynamics CRM solution and after researching their partner options, they selected PowerObjects. "It's beneficial to use a Microsoft partner when developing solutions for Microsoft platforms," says Greg DeWitt, Vice President at Red Door Company. "The partners have the skill sets and the resources to be able to develop a solution for your business. PowerObjects has the engineering and consulting capabilities to make other businesses successful in implementing Microsoft Dynamics CRM solution. PowerObjects is the leader in the Microsoft Dynamic CRM community and are the key Microsoft partner in developing solutions for Microsoft Dynamic CRM."

RED DOOR COMPANY
USES MICROSOFT
DYNAMICS CRM AND
POWEROBJECTS' SUITE
OF POWERPACK
ADD-ONS TO CENTRALIZE
THEIR CUSTOMER DATA,
MANAGE LEADS,
AUTOMATE MARKETING,
PROVIDE MOBILE ACCESS
TO DATA, STREAMLINE
THEIR CUSTOMER
FEEDBACK PROCESS, AND
ENSURE RESPONSIVE
CUSTOMER SERVICE



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SOLUTION

Red Door Company needed a solution that would:

- + Provide a centralized database for all customer information and data
- + Allow easy mobile access for working in the field
- + Improve lead tracking and lead management
- + Provide marketing automation capabilities
- + Allow for capturing and measuring customer satisfaction
- + Streamline the service inquiries process

Red Door Company implemented a Microsoft Dynamics CRM Online solution and utilizes PowerObjects' suite of PowerPack add-ons including PowerWeb-Form, PowerMailChimp, and PowerSurveyPlus to extend and enhance the functionality of their solution.

"Red Door Company chose Microsoft Dynamics CRM primarily because of the total package," says DeWitt. "We were able to integrate all of the pieces that we needed to develop a business solution and in particular, we were able to do this using some of the PowerPack add-ons that PowerObjects had developed. The online version of Dynamics CRM was the right choice for us."

As an added benefit, Red Door also subscribed to PowerObjects' service-as-a-subscription program, PowerSuccess, which gives them access to a dedicated CRM administrator and a long-term plan for success. "The biggest advantage of having a CRM partner is not having to figure this out on our own," adds Crenshaw. "The opportunity to ask questions and tap into the expertise of someone who can really make this platform dance, is golden."

BENEFITS

A Centralized Database

Red Door Company's brokers work remotely and before they implemented Dynamics CRM, each broker's data existed in silos. If a key employee left the company, that data was not easily shareable or tracked making the transition to fill that role more difficult. "With Dynamics CRM we have centralized place for all of our data and we can now see what everyone else is doing," says Crenshaw. "It's much easier to backstop each other, support each other, and as turnover occurs, we don't have the empty silo effect that we had before. A tool like Dynamics CRM allows us to slip into the shoes of that outgoing broker and provide our landlords and tenants with a seamless transition."

It was important for Red Door to be able to view their data and dig into particular areas in order to continue to develop better processes, improve services, and make better decisions. "Before Dynamics CRM, we didn't have any way to use our existing data to do our jobs better. We needed a repository of data and we needed it to be available to us in a way that we could parse and utilize," Crenshaw adds.

Mobile Access on the Road

With a mobile workforce, it was important for Red Door to also have a CRM solution that would allow for easy mobile access while out in the field. "We spend a lot of time in our cars while we're out showing homes or checking our owners' properties," says Germany McNeal, Property Manager at Red Door Company. "Dynamics CRM allows us to be more efficient. For example, while I'm waiting for a showing, I'm able to respond to email or assign work orders. I'm able to do work from all of my mobile devices while on the road."

The Red Door team is now able to make notes and add data in CRM while they are on site at specific properties or while meeting with customers. "Dynamics



CHALLENGE

Red Door Company needed a solution that would provide a centralized database, allow mobile access, improve lead management, automate marketing, and capture customer feedback.

SOLUTION

Microsoft Dynamics CRM Online, PowerObjects' PowerPack add-ons, and PowerSuccess

BENEFITS

- + Provide a centralized data base for all customer information and data
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PRAISE FOR POWEROBJECTS

"I can't tell you how much comfort it gives me personally knowing that we have true experts helping us make this work as well as it can. I don't think there's any question that PowerObjects is invested in Red Door Company's success—and not just in our successful adoption of Dynamics CRM as a technology platform—but I really feel our PowerObjects is invested in our success as a company."

TODD CRENSHAW

President

Red Door Company

BENEFITS |CONTINUED|

CRM sets us apart because it allows us to have all of our process available online," says McNeal. "We can document our work as we move throughout the day while in the field – particularly with our inspections module. We're able to take picture and make comments right from our mobile devices. When we get back to the office, we have everything available so we can send out reports to our owners and notify our tenants of any needs that a particular home may have."

Effective Lead Management

Red Door uses Dynamics CRM to manage their leads in a centralized, efficient, and organized location. "Before we had our CRM system, our prospective tenant inquiries would arrive in our inboxes and it would take time to determine who that lead should be assigned to as well as providing a response back," says DeWitt. "With CRM it is now much easier for Red Door to capture leads and provide quick follow up."

Red Door uses the PowerObjects' PowerPack add-on, PowerWebForm, to capture lead data from inquires on their website and automatically write that data in CRM. Using workflows in CRM, these leads are assigned to a specific broker or property manager who receives a notification as well as providing an automatic response back to that prospective tenant so the broker can schedule property showings. With some of the stage processes built into Microsoft Dynamic CRM, the organization is able to track where that prospective tenant lead through its entire process.

"Before Dynamics CRM, our brokers were feeling some pain points in managing the volume of incoming leads," says DeWitt. "Some of our more popular properties will get 50 to 60 inquiries in a day, and it's very hard to ensure you've touched every single one of these inquiries. Using workflows in Microsoft Dynamic CRM that were developed by our PowerObjects engineer, we are able to make sure that we reach out to each prospective tenant with reminder systems to make sure that we respond to every inquiry."

Marketing Automation

Red Door also uses Dynamics CRM and PowerObjects' PowerPacks to market to their three primary sources: prospective tenants and existing tenants, landlords and prospective landlords, and referral sources – with the primary referral source being other licensed real estate agents in North Carolina. The organization uses the PowerMailChimp PowerPack add-on to send out email blasts to each of these sources through CRM.

"Red Door Company relies heavily on referral sources," says DeWitt. "Much of our business comes from other licensed real estate agents in the business. Before CRM, we didn't have the opportunity to market to people with whom we



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TODD CRENSHAW
President
Red Door Company

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BENEFITS | CONTINUED |

already had a relationship. We didn't have an easy and efficient way to keep in touch with them, to keep Red Door Company in the forefront of their mind."

Actionable Customer Feedback

Customer feedback is very important to the Red Door team. They were looking for a streamlined way to survey their customers and then use that data in an actionable way. The organization uses PowerPack add-on, PowerSurveyPlus, to create surveys to send to their customers and prospects.

Red Door sends out surveys at key points in their relationship with their tenants such as, after an initial showing, at the beginning of a lease, after a move in, and during the move-out process. "We use PowerSurveyPlus to survey our landlords and our clients," says DeWitt. "We need to know what they think of us and to see if we're doing a good job. We have several different points where we send a survey. One example is after the initial pitch meeting to a prospective landlord client. If we lose the pitch, we send over a survey so we can see why we may have lost that pitch. It's extremely important from a business perspective to know where you have weaknesses."

The Red Door team pulls survey responses into reports in CRM and set up criteria to ensure that management reviews any negative scores. "We have automated systems that notify us when a bad survey comes in so we can immediately address the issue and take the necessary steps to try and improve the customer experience," DeWitt adds. "Customer satisfaction is very important to us, and we wouldn't be able to do it without PowerSurveyPlus."

Responsive Customer Service

Providing top-notch service is very important to Red Door and it was important to the organization that their CRM solution be able to support this. "Our landlords would pick Red Door Company over other competitors because we actually call them back when they call us, we communicate heavily with them, and we use our Microsoft Dynamic CRM platform to accomplish this," explains DeWitt.

If Red Door tenants have any issues with their property or any maintenance issues, they can access Red Door's tenant portal and fill out a work order form that is immediately logged in CRM and kicks off a notification to the appropriate person to resolve the issue. "Before we had CRM, our workflow process was not as defined," says McNeal. "I think CRM has helped to define that workflow process so that we ensure that no one is falling through the cracks and that all of our clients and customers receive great service."

PowerSuccess Service Model

Red Door Company chose the PowerObjects' PowerSuccess service model because they didn't have the skills in-house to develop a Microsoft Dynamic CRM solution on their own. For a predictable monthly fee, the PowerSuccess program provides a dedicated engineer to help Red Door develop their solution and be on call to provide continuing assistance.

"The primary benefit I've seen with the PowerSuccess program is that we can rely on our engineer to develop the solution we need and to use their skills and knowledge of the industry to make suggestions," says DeWitt. "At the beginning, our PowerSuccess engineer interviewed us to determine what kind of business we are and to determine what our potential needs would be. Our PowerSuccess engineer really took the time to learn our business. They have been very helpful in getting to know what we need — even if we didn't really know what it was that we needed."



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CONCLUSION

Red Door Company's Microsoft Dynamics CRM solution has helped the organization continue their vision of providing great customer service and to continue to improve by adopting technology. "We continually work on upgrading our technology to fit the needs of our clients and our customers," says Bennett Robinson, Property Manager at Red Door Company. "I don't think a month goes by without some sort of change that we make to our systems in order to provide better services for our clients and our customers. We have successfully found ways to incorporate technology with personal service between the landlord and the property manager, and the tenant and the property manager to provide excellent services across the board."

With CRM and PowerObjects' PowerPack add-ons, Red Door now has a centralized database for all their customer information, mobile capabilities for field work, effective lead management, automated marketing, a streamlined customer feedback process, and the ability to provide efficient service to their tenants. "Technology like Microsoft Dynamics CRM is the backbone of Red Door Company, because it allows us to be more responsive," says Crenshaw. "It allows us to operate in real time, which means excellent service. It allows us to do business untethered and it allows us to do business in a completely green way. We are 100% in the Cloud."

With PowerObjects and the PowerSuccess program, Red Door has a partner to help them grow and evolve their solution as their business continues to grow. "PowerObjects has been so much more responsive and supportive than other tech vendors we've used in the past," says Crenshaw. "I can't tell you how much comfort it gives me personally knowing that we have true experts helping us make this work as well as it can. I don't think there's any question that PowerObjects is invested in Red Door Company's success—and not just in our successful adoption of Dynamics CRM as a technology platform—but I really feel PowerObjects is invested in our success as a company."



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