HOW ONE BROKER TEAM HAS BECOME 50% MORE EFFECTIVE

INDUSTRY: BROKERAGE | OCCUPIER USERS: 100 | DEALS MANAGED: 300 -1,000

Jeremy Adams is the Executive Vice President for JLL, Atlanta. He manages a team of brokers and represents a wide variety of space users —from large healthcare systems to multi-site specialty groups, professional service firms, and rapidly-growing entrepreneurial start-ups — Jeremy works with his clients to create long-term commercial real estate strategies.
Leveraging his background in commercial real estate market research, Jeremy provides his clients with a decade's worth of in-depth knowledge of market analytics and a scientific approach to strategy.

"My relationship with Occupier began shortly after showing one of my clients our Google Sheets Project Tracking system, and he said "there has to be some sort of software that can help manage the process of these deals. Something that sends emails and alerts and allows for team collaboration." So, after exploring a few software solutions, we landed on Occupier and have been using it daily ever since," says Adams.

Moving Deals Forward

"I always tell my team our job is to move deals forward," says Jeremy Adams. With Broker CRMs like Occupier, automated notifications and task management help keep the team on track. "Prior to using Occupier, I had to turn away 5 new clients a year due to a lack of bandwidth. But, Occupier gives us the ability to do more deals than we ever have before. In the past, we would use an excel spreadsheet project tracker for one client, then use emails or onenote as a to do list for another client, it was all dispersed in different places. With Occupier we are 50% more effective by working together in-one-place," say Jeremy Adams.

Life Before Occupier

- We turned on average 5 clients away a year due to lack of bandwidth.
- We worked on deals in numerous platforms: email, messaging, google sheets, and document storage.

Life After Occupier

- We no longer have to turn any new business away. Our team is 50% more effective because of Occupier.
- We are able to save 40 hours a month using Occupier.

JEREMY ADAMS

Managing Director

"Occupier gives us the ability to do more deals than we ever have before — our team is 50% more effective."

Keeping All Teams Aligned

The collaboration piece is key in working on new deals. "And, giving our clients the ability to log in, to see the deals and updates from us brokers has been amazing," said Adams. It helps to keep everyone on the same page, especially when the person making real estate decisions today is changing, it's not just the head of real estate that is involved. For instance, "I have one client that has created a deal room in Occupier that includes twelve folks including their CEO, Project Managers, Architects, and Finance Managers; and it's where they collaborate and push the deal along. In essence, Occupier keeps all teams accountable for completing their individual tasks.

Becoming More Efficient

"If you want to increase your efficiency, add to your deal count, and increase your portfolio of clients then Occupier is for you. This software unlocked a new level of efficiency and capabilities for my team. We have been able to save roughly 40 hours per month using Occupier. The consolidation of all processes into one platform has been a game changer," says Adams. From emails to spreadsheets, document storage, task management and collaboration, Occupier has all the tools to keep you efficient. According to Adams, "realistically, if I'm managing 500 transactions, I'm going to forget some details on some deals but Occupier helps keep me on task with the notes. For example, I can go into Occupier and say to my local broker, we need a market survey by May 12th. And instead of sorting through my sent emails to find this task I am pinged in Occupier when it's complete or past due."

In Conclusion

Broker real estate software solutions not only help you collaborate with your tenants and team, but it ensures your deals are moving and that everyone is aligned on their tasks. A solution like Occupier makes you more efficient and effective overall.