

INCREASE TIME-SAVINGS AND IMPROVE DATA QUALITY WITH SEAMLESS DATA SUBMISSION

CLIENT USE CASE



Global Investment Leader
New York, NY

This use case features a global investment leader with over \$1 trillion AUM focused on managing an array of public and private assets for their customers around the world. The client invests in global real estate across all property types.

The client selected Cherre's Data Submission Portal to seamlessly collect, validate, and aggregate their property manager data with unprecedented flexibility and transparency.

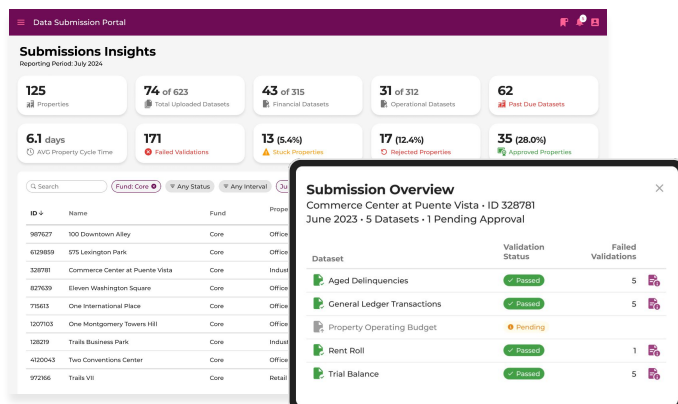
Solution Highlights

- **Improved data quality** through a structured data ingestion process and automated validation, **reducing user errors**.
- **Increased transparency and visibility** into the data submission process with data lineage and auditability throughout.
- **Lowered software costs** to aggregate data across a global portfolio.
- **Shortened close periods** through more effectively managing the intake of provider data.

The Challenge: A Workflow-Driven Data Submission Process

As part of an overarching business transformation initiative, a global investment client needed to build robust data collection capabilities that went beyond basic trial balance and rent roll data. The client sought a solution that would allow them to seamlessly ingest data from their property managers without adding additional resources. They knew this data would give their real estate professionals the same level of insight as if they had direct access to the disparate property management systems.

The client understood that submission of data is not a one-way process. They wanted to create a workflow-driven, cycle-based process that would standardize data and automate validation while facilitating collaboration across the different parties utilizing features such as comments and notifications.



17+
Standardized financial and operational datasets deployed

30+
Property managers onboarded with comprehensive automated validation rules

One
Streamlined data intake process across providers

Solution

Cherre deployed our [Data Submissions Portal](#) to help streamline, automate, and standardize the client's data collection process from property managers. This level of standardization allowed them to effectively aggregate, report, analyze, and drive decision making with trusted data.

As part of initial setup, Cherre onboarded more than 30 different property managers, deploying mappings of the property managers' charts of accounts (COA) to the client's chart of accounts, implemented standard and non-standard data validation rules, configured approval workflows, and defined user roles across the organization. Once live, Cherre's Data Submission Portal enabled the client to track submissions progress and establish a consistent process across property managers leading to complete and timely data reliably coming into the organization.

As part of our standard onboarding methodology, we trained the client to self-administer the portal. After onboarding, they had full control over managing user roles, COA, entity, and other mappings, and property assignments, giving them complete control over their submission cycle and the technology that powered it.

Cherre also deployed its Managed Egress solution to securely route the client's connected submissions data to their Snowflake data warehouse for downstream consumption.

Outcomes

Automated Workflows for Increased Data Quality

With Cherre's Data Submission Portal, the client was able to successfully shift their operating model and deploy a structured data ingestion process that automated workflows, shortened close periods, and lowered software costs.

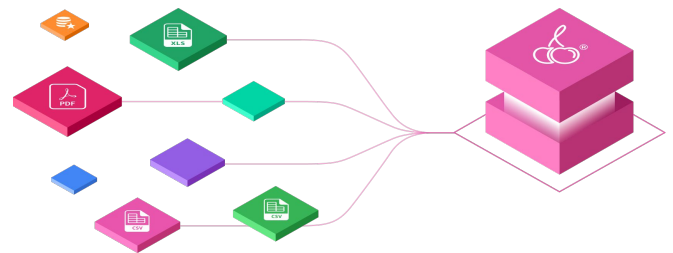
Cherre also enabled the client to:

- Improve data quality and increase accuracy by automating validation and driving standardization.
- Rapidly address issues with property managers throughout the cycle with notifications and dashboards that provide visibility into submission progress.
- Further automate downstream processes with high quality, trusted data.

Future

Expanded Submission Intake Innovation

Cherre has positioned the client with the ability to shift their operating model across multiple countries and regions. They also have the agility to expand both the breadth and depth of their data collection capabilities in response to ever changing conditions.



ABOUT CHERRE

Cherre is the real estate industry's leading data management platform. Our end-to-end platform helps clients breakdown silos, transform and model their disparate data so they can automate workflows, increase efficiencies, reduce risks and optimize data-driven decision making. Quickly identify opportunities to increase profitability, gain visibility into market trends, and make strategic moves in response to changing market conditions based on trusted data-driven insights.