



## Case Study



## Streamlining data ingestion and investment portfolio management for investors

A real estate giant delivers real-time business intelligence to investors at the tip of their fingertips using Microsoft technologies



## Executive Summary

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A real estate giant who not only manages and trades in properties, but one who also offers investment services for the realty sector, needed a one-stop solution to manage their portfolios. GS Lab helped the customer in consolidating all of their data ingestion processes and enabled them to present a comprehensive dashboard to their end users. This solution allowed end users to monitor and analyze their investments in real-time while increasing the accuracy of data points.

## Background

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Our customer is a real estate giant having substantial presence in more than 20 global cities. Their business portfolio offers consumers a wide range of services like buying, developing, selling, leasing, managing, marketing and redevelopment of different types of commercial & residential properties. In each city, there are multiple properties under the purview of the company.

The company also opens investment funds. High profile investors invest in these funds. Each fund invests in several properties not necessarily of the same type. Investors need complete understanding of fund allocation, project status, expenditure, revenues and return on investment. The central finance & accounting department needed real-time data for book keeping, decision making and improving investor relations.

## Challenge

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The company was using different systems for maintaining records in different cities. There were very few common applications which produced limited data. The raw data needed processing to generate insights. Each property needed to maintain specific information related to its domain. For example, a rental property needed to maintain information about occupancy, rental rates and contracts. Employees at each node used to ingest some data in standard applications and manually prepared excel sheets for nonstandard information. This information from properties across the country was collated, processed and reports were then generated for investors.

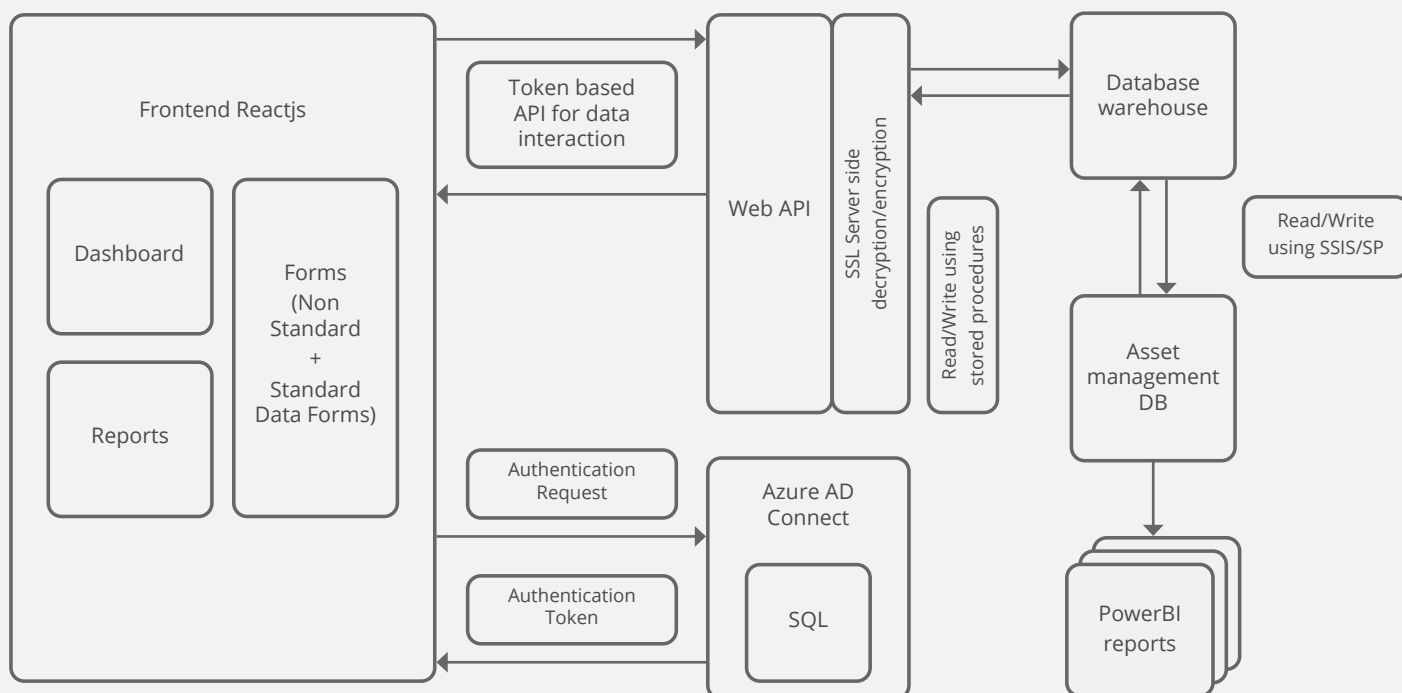
This system suffered the following drawbacks:

1. There were a lot of inaccuracies and redundancies due to manual data ingestion.
2. Report generation was frequently delayed.

3. Unnecessary time was spent in coordination between property managers and the central finance division.
4. Real-time data was not available.
5. Slicing & dicing of data was difficult which led to limited insights.

## Solution

GS Lab studied the customer's operations, understood the processes and applications. We built data structures for properties, funds and stakeholders and got those signed off by the finance department. GS Lab also studied actions performed by each stakeholder. We designed a simple system where each person could perform all the activities under their purview using a simple user interface. The wireframes were designed after analyzing user input.



*Investment management site and data warehouse flow diagrams*

## Architecture

GS Lab designed the solution using solution leverages Microsoft technologies like Azure, Reactjs, PowerBI, SSRS, SQL, C# and CRM Dynamics365. The applications were integrated and data was pulled from those applications as and when needed.

## Impact

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**Improved  
productivity &  
accuracy**



**Real-time data  
feeds and  
analytics**

1. Our solution integrated data ingested from different nodes and delivered it on a single portal for fund analysis.
2. Key performance indicators and their drill down menus were now available instantly.
3. The new system improved productivity and accuracy by elimination the need of manual intervention.
4. Investors were now able to access real-time data analytics.
5. Our solution made single click reporting available for all stake holders.
6. The solution supports easy customization and configuration for future needs.

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