



Colliers Drives Automation and Gives Real Estate Brokers Better Data with Smartsheet and HubSpot Integration

Colliers International is a leading diversified professional services and investment management company with operations in 62 countries. The company's 17,000 professionals work collaboratively to provide expert real estate and investment advice to clients.



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Crissy Nolen, Chief Marketing Officer,
Colliers | Houston



Customer:

Colliers International

Industry:

Professional Services

Organization Size:

Enterprise (10,000+ employees)

Region:

North America

Website:

colliers.com/en

Real estate investors, property owners, tenants, and developers depend on expert advice and assistance in finding and purchasing properties throughout the world. Through a growing team of real estate brokers and advisors, Colliers offers a range of commercial real estate services including capital markets expertise, corporate services, and real estate management.

Background

For the past several years, the Colliers marketing department has used Smartsheet software for everything from project management to client services to event scheduling. *"Smartsheet has helped us glue everything together to give us one source of truth for all our client and marketing data,"* says Crissy Nolen, chief marketing officer, Colliers in Houston. *"In addition to marketing, we're starting to use it to streamline processes in research, operations, and finance."*

For Nolen and her team, it is critical to get updated, accurate real estate market data to clients as quickly as possible. *"In these uncertain economic times, clients want to be smarter with their investments,"* Nolen says. *"That's why it's crucial that we provide key data on what the market is doing at any given time."* Providing the most updated data was challenging because locally Colliers used an outdated customer relationship management (CRM) system. *"We had six different spreadsheets to manage one segment of our data, which was inefficient and too time-consuming,"* says Nolen. *"Each spreadsheet was maintained by different employees, who had to manually update our lists. We often had data that was out of date."*

Colliers also needed a better way to determine when property listings were about to expire. *"We didn't have a way to automate reminders and send them to our brokers. We did that through our CRM system, and it required a lot of importing and exporting information,"* says Nolen. *"If brokers aren't on top of getting their listing agreements renewed, they could lose out on commissions, or we could potentially be sued for marketing a property we don't have a listing agreement on."*

Solution

Colliers discovered that Smartsheet could solve its data accuracy and automation challenges. *"I had*

Customer:

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“

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Colliers | Houston

evaluated a few task management solutions, and they didn't have the date reminder and database management capabilities we needed," says Nolen. While attending a Colliers conference, Nolen found out that the company's business development team was managing projects in Smartsheet. "I came back and used it and realized it was going to meet our needs," says Nolen.

Colliers relies on Smartsheet as its primary data directory, with all client contact information and updated property listing data in one place. The company uses Smartsheet to produce several client-facing dashboards for property owners and prospective buyers, with information such as maps, competitive listings, and detailed market data. In addition, Colliers uses Smartsheet to manage marketing activities such as email campaigns, client reports, and event scheduling.

To meet its listing expiration reminder requirements, Colliers uses automated workflows in Smartsheet to send timely reminders to brokers detailing listing data. The organization's marketing team also uses the Smartsheet mobile app for real-time access to Smartsheet data from phones and other mobile devices.

To further streamline its marketing data, Colliers uses data sync technology to integrate data between its HubSpot CRM software and Smartsheet. The technology syncs real-time customer and account information between the two platforms automatically. *"Our updates are synchronized as they happen, so we don't have to manually enter data in either place. If we update something in HubSpot, it automatically makes the same change in Smartsheet," says Nolen. Colliers also uses Smartsheet Calendar App to manage marketing campaign emails.*

Recently, Colliers adopted Smartsheet Advance, a Smartsheet offering with premium capabilities. With Smartsheet Advance, Colliers is taking advantage of Data Shuttle to upload email data to Smartsheet from HubSpot. The organization also uses Smartsheet DataMesh, an app that maps Smartsheet data between large sheets and reports for better consistency. *"With DataMesh, client services coordinators simply select a broker and the data matches automatically, with updated contact*

In a Nutshell:

With more accurate data, Colliers can more frequently deliver its property reports for landlords and investors.

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Crissy Nolen

information. It eliminates the need to manually type in this data every time," says Nolen.

More accurate data with HubSpot and Smartsheet integration

By integrating Smartsheet and HubSpot, the Colliers marketing team can update all contacts and email lists automatically at the same time, without having to maintain the data individually in each platform. *"The data sync was very intuitive because both platforms talk to each other naturally through the HubSpot workflows we set up,"* Nolen says. *"We just had to log into both solutions and they connected right away. Now, we don't have to update contact or company data in both places."* As a result of the integration, Colliers has improved the speed and timeliness of the data it provides to clients. *"Previously, when we had to import new data or update information, we had to spend a few hours auditing or reformatting the data in both Smartsheet and HubSpot,"* says Nolen. *"Now, the updates happen immediately and I'm confident the data is up to date and error-free."*

Colliers has also improved its event registration processes with the integration between HubSpot and Smartsheet. For a recent broker event, Nolen's team created a landing page in HubSpot where attendees filled out a registration form. This data was automatically updated in Smartsheet, making scheduling information accurate in both solutions.


With more accurate data, Colliers can more frequently deliver its property reports for landlord and investors. *"Previously, we only did reports once a month because we had to manually extract all the data from many different sources, and that data was then outdated days later,"* says Nolen. *"Now, because of the HubSpot and Smartsheet integration, we can build a report in a few minutes that stays current, and we can post the report immediately in Smartsheet dashboards."*

Automated reminders for real estate brokers

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lease expirations. *“Automatically reminding people about lease expirations makes us better brokers, because we’re helping our clients ensure they have ample time to strategize their next move,”* says Nolen. *“That means we’re keeping our clients happy and not losing their business. We see creating dashboards in Smartsheet as a best practice, and we want to do that for all our clients.”*

Colliers is also using its Smartsheet marketing dashboards to track social media, web visits, and video views, which helps the company be more proactive about marketing campaigns. *“Using Smartsheet, we can look at the data and easily see if a certain marketing campaign performed better than another,”* Nolen says. *“With that information, we can tweak our marketing strategy as needed.”* For example, when Colliers took its annual trends event online during the pandemic in 2021, the company saw a large spike in social media impressions. *“Based on that, the next year we did a recording of the live event and optimized our campaign strategy for a public online version,”* says Nolen.

Cost savings from increased efficiency

Smartsheet helps Colliers work more efficiently, which will ultimately help the company save money by not needing to hire additional resources. *“One of the selling points of Smartsheet Advance was cost avoidance,”* Nolen says. *“We predict we will save \$90,000 annually by not needing to hire additional client services roles as we grow.”* Colliers also plans to expand its use of Smartsheet Control Center for advanced project management capabilities. *“Using Smartsheet, we’re able to turn projects around faster than before, with more accurate data,”* says Nolen. *“Smartsheet makes us all look like rock stars.”*

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