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Managing Global Building Operations Across Real Estate Teams

Salesforce's Real Estate Technology team runs a high-volume operation that requires data collection from employees and visitors across 150 locations. They needed a tool that would streamline the operation, creating a user-friendly process for accepting and reviewing hundreds of building requests. After careful consideration, they selected Forms for Salesforce to help employees manage operations across their global locations.

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Salesforce is the world's #1 customer relationship management (CRM) platform. It helps your marketing, sales, commerce, service, and IT teams work as one from anywhere—so you can keep your customers happy everywhere.

Industry	**Customer Since**
Technology	2021
Use Case	**Products**
Building Requests	Forms for Salesforce

Features

Native Builder, Community Cloud Forms, Conditional Logic

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Challenge

Salesforce's Real Estate Technology team was struggling to streamline data collection from employees and visitors across 150 locations. They capture information on maintenance requests, building rentals, service requests, conference room reservations, and any other building issues. With an increasing number of requests across locations, it was becoming difficult to easily track, manage, and store data. Their process included maintaining 80 different forms, which was not sustainable. As they reviewed their building operations, they decided they needed a 100% native Salesforce solution that could reduce the amount of forms, meet compliance standards, and drive a dynamic experience. The goal was to create one form that would adapt to the needs of the employee or visitor using conditional logic, making it simple to manage the process while capturing all necessary data.

80
different forms

Solution

With Formstack, Salesforce replaced their old process with a single form that consolidates into a "decision-tree" format. They built this using Formstack's 100% native Salesforce form builder, Forms for Salesforce. During their review of form tools, they felt that Forms for Salesforce surpassed other options due to its level of security and functionality. It offers the ability to build Salesforce forms without adding third-party integrations or leaving their Salesforce instance, and forms can be easily embedded into an Experience Cloud Site. In this new process, when users fill out a form, it is automatically pre-filled with any information already linked to them within Salesforce. The one form captures all information needed across the 150 sites, then routes it to the correct person or department, all while keeping records in Salesforce synchronized across the process and flow.

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"We evaluated build vs buy and scored vendors based on five key categories. Formstack was chosen as it was built on Force.com and would maximize our return on the build out of our Real Estate and Workplace Services Salesforce org. It provides a no-code option for our team to quickly build complex, custom forms that handle special processes, from event registrations to global shipping requests."

Fawn Perazzo
Senior Manager, Real Estate Technology at Salesforce

The Results

| Condensed 80 forms into one single form process | Established an end-to-end workflow across all systems | Connected 150 locations to a single process | Saved hours of time by eliminating multiple forms | Adhered to security and compliance requirements | Streamlined workflow using conditional logic |

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