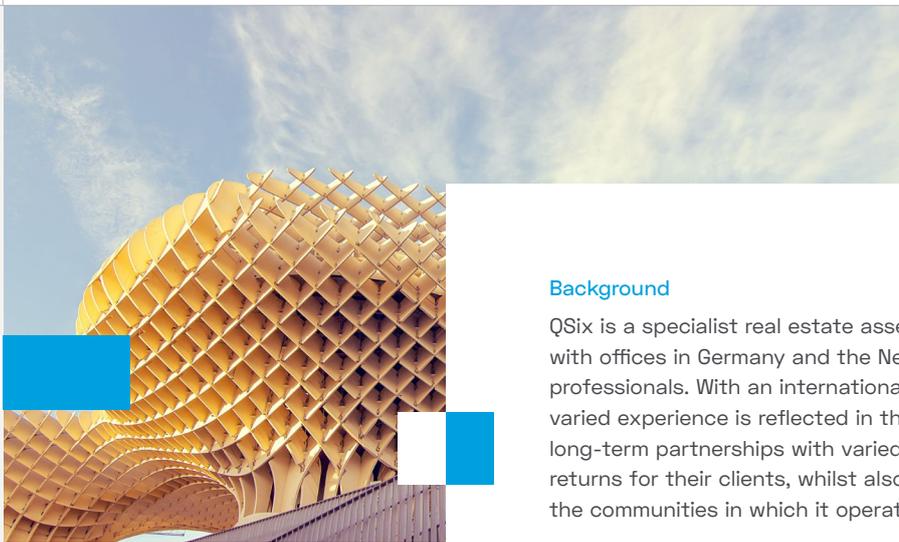


Qsix Specialist Real Estate Asset Manager



Background

QSix is a specialist real estate asset manager, based in the UK with offices in Germany and the Netherlands, employing over 50 professionals. With an international team of experts, their deep and varied experience is reflected in the partnership structure. Developing long-term partnerships with varied investors, QSix generate attractive returns for their clients, whilst also making a positive social impact on the communities in which it operates.

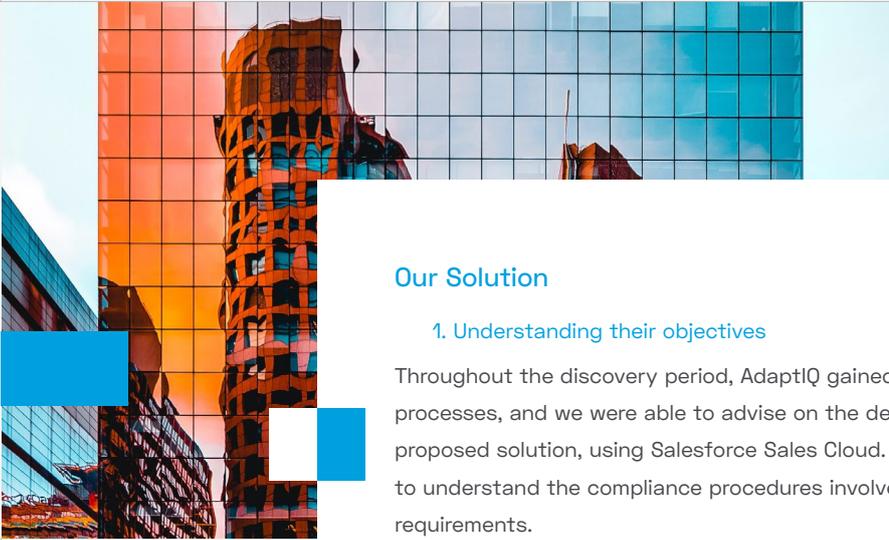
Objectives

QSix needed a cloud-based CRM system to accommodate their increasing growth. Their core objectives were to centralise all of their market intelligence and facilitate the active management of the sales team. Furthermore, QSix's fundraising process was configured to efficiently onboard investors and progress investment opportunities through into established funds.

Their previous system was a static database that could not capture the different stages of the fund-raising process and offered limited reporting capabilities. With stringent industry regulatory protocols to adhere to, QSix's process to vet and approve potential investors, and match these to suitable funds, was essential to maintain.

Comprehensive reporting into various facets of the business was a requirement, for not only senior managers, but for all users of the system. Adapt IQ worked with QSix to understand their reporting requirements across the organisation, and configured Salesforce to meet their expectations.





Our Solution

1. Understanding their objectives

Throughout the discovery period, AdaptIQ gained full understanding of QSix’s business processes, and we were able to advise on the design and technical configuration of the proposed solution, using Salesforce Sales Cloud. Of particular importance at this stage was to understand the compliance procedures involved, as well as the reporting and dashboard requirements.

2. Defining their Approach

With QSix’s requirements in mind, our solution was established to ensure adherence with regulatory protocols and compliance procedures. Through investor nurturing and data-driven fund management, we ensured that our solution would not only support QSix’s existing processes, but also improve the efficiency and efficacy of these processes.

3. Customisation

Adapt IQ customised Salesforce allowing different users to have an experience tailored to their role. This more versatile system would increase user adoption by simplifying the system for all users. Automations were configured to streamline existing processes, automate repetitive tasks, and crucially- alert relevant parties within QSix of any changes that may affect the compliance status of investors.

4. Delivery

As a result of regular touchpoints and ‘show and tell’ engagements with QSix, Adapt IQ were able to provide confidence and initial familiarity with Sales Cloud, and also enhance the solution progressively.

To ensure seamless user adoption, we created fully customised and comprehensive training material, which was delivered to QSix in a ‘train-the-trainer’ approach in its primary use. The training material was then also provided to QSix to act as a resource for future benefit.



Working with AdaptIQ has been a pleasure; they quickly understood our configuration needs and were able to create a bespoke solution that incorporated our internal processes and compliance approval requirements.

The project delivery was timely and the team at AdaptIQ was able to work around our busy schedules with great flexibility; they also put together a very detailed training manual that we’ve found very helpful for new starters. All in all a great experience and we would not hesitate to recommend them going forward

Miriam Macor – Head of Private Capital - QSix



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