

CASE STUDY:

Real Estate: A Relationship Business

Touchstone Commercial Partners (TCP) is a leading San Francisco boutique commercial real estate brokerage firm. TCP works with leading businesses to provide market insights and customized real estate brokerage services.

The decision to buy or sell real estate properties is one of the most important financial decisions a business makes. More often than not buyers and sellers rely on reputation when selecting a real estate agent. Cultivating strong relationships built on trust is a prerequisite for success.

BEFORE AFFINITY

Before Affinity, TCP had tried several different tools to manage their relationships with clients. These tools were difficult to use and required too much manual work to encourage adoption. In the end, TCP reverted to using spreadsheets to track and manage client relationships.

Unfortunately, this approach was limiting. TCP didn't have clarity into the complete history of a relationship, including details on past transactions. In an industry defined by long-term relations, where clients are often involved in multiple transactions, this insight is critical.

ENTER AFFINITY

With an eye on efficiency and a desire to more effectively manage relationships with clients, TCP selected Affinity. Affinity's automated data capture allows TCP brokers to virtually eliminate manual data entry. Brokers now have full transparency into the history of relationships.

Affinity has also helped TCP enhance deal flow. Brokers are able to predict which opportunities their existing client base may be interested in based on past transaction involvement history.

Michael Sanberg, a Leasing & Sales Agent at Touchstone Commercial Partners explains, "Affinity allows us to manage more clients. That will lead to more top-line for our business."

TCP is dedicated to ensuring the success of its clients. Relationships are king. Affinity allows TCP to more effectively track real estate transactions, manage client relationships, and identify new sales opportunities. Its integrated solution ensures that brokers are able to provide the highest level of service to its client. With Affinity, TCP is primed for long-term growth and success.



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Affinity is a relationship intelligence platform built to expand and evolve the traditional CRM. Affinity instantly surfaces all of your team's data to show you who is best suited to make the crucial introductions you need to close your next big deal.