

Case Study for NAI REOC Partners: “Send As Attachment”

Region: United States – San Antonio, TX

Industry: Commercial Real Estate

Customer Profile: NAI REOC Partners is recognized as one of San Antonio’s largest commercial real estate companies with a well established client base consisting of over 6.5 million square feet of leased/managed commercial space, covering most of Southwest Texas. The organization provides property management, technology, marketing and corporate services support to its network of real estate offices. NAI REOC Partners is a part of NAI Global, one of the world’s largest independently owned commercial real estate services organizations managing more than 200 million square feet of commercial property, recently ranked the #3 brokerage organization by Real Estate Forum in 2007-2008.

Business Challenge: It was one and a half years ago when the Director of Information Technology for NAI REOC Partners in San Antonio, Texas implemented SharePoint in an effort to establish and support twelve different workflows between multiple departments spread across the organization including brokerage, administration, marketing, accounting, property management and maintenance. As part of this initiative, most documents were moved off of file shares and moved onto SharePoint to accomplish the goal of having one central repository for information to be easily shared amongst the various departments. Unfortunately, SharePoint was not well adopted by many departments, in particular brokerage and accounting due to the level of complexity of being able e-mail documents from within SharePoint. When a broker would try to send a document to another broker, for example, if he did not give up first he would have to save the document to My Documents (which was not being backed up by IT), leave the SharePoint site, go into Outlook to open an e-mail and attach the file to send manually. For a broker this meant one too many steps than he had before, he had to browse for his attachment and thus SharePoint was not proving to make his life any easier.

Solution Description: SharePoint by default does not support emailing a document directly from a document library. In order to email a document you must first save the file locally and then create your email and attach the document manually. Hedgehog Development’s Send as Attachment Web Part gives you the ability to email a copy of your document directly from SharePoint using your MS Outlook.

Benefits/Metrics: The purchase of the Send As Attachment Web Part was a homerun for NAI REOC Partners as the Director of IT was finally able to get the buy in he was hoping for to prove to his management team that SharePoint was a worthwhile investment. Immediately after implementing Send As Attachment, organizational productivity dramatically increased. Here are some examples of the workflows that improved and led to better efficiencies company-wide:

- Administrative staff can now easily send lease documents to the PDA of the Property Manager for instant review while they are on-site with a tenant.
- The brokers have the ability to send marketing packages and documents to prospective tenants without the involvement of administrative staff who used to waste valuable time searching for files, becoming frustrated with the previous manual process.
- The Accounting Department who used to courier and mail reports to owners of buildings they managed on a monthly basis now upload PDF reports and use Send As Attachment to email them right from SharePoint reducing the cost by 85% in courier and postage fees.