



IRVINE COMPANY

REAL ESTATE

Salesforce CRM

Who They Are

With roots dating to the 1860s, the Newport Beach, California-based Irvine Company is a **private real estate investment company** that has long been known for balanced, sustainable development of high-end planned residential communities, commercial and retail space, apartments, and hotels.

They are committed to “long-term ownership and operations of high-quality real-estate holdings” that currently **span 125 million sq ft including more than 550 office buildings, 125 apartment communities, 40 retail centers**, and many planned residential communities. Each of Irvine Company’s primary areas of operation exists with a unique set of stakeholders, each of whom have their own requirements around factors including, but not limited to, data access, connection, transmission, analysis, visibility, and reporting.

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Solution

As a trusted partner known for fielding the top Customer Relationship Management (CRM) experts in North America, Tokara Solutions had a long and successful track record providing Irvine Company critical support for its CRM platform. Tokara boasts an elite team of Pivotal and Salesforce CRM experts along with its sister organization, Platinum Salesforce partner Stratus360.

The team set out to ensure they knew the concerns and requirements of every stakeholder, and to ensure those same stakeholders became and remained fully engaged in the collaboration that would drive the **migration of Pivotal CRM to Salesforce** itself. They also wanted to ensure that adoption would be strong and incorporated the appropriate change management into their implementation methodology.

Bringing together representatives of sales, sales operations, marketing, finance, escrow, construction, customer service, and other key departments in an extensive series of workshops, the Stratus360 team also solicited input from Irvine’s “superusers” of the system.

The Tokara team also used workshop-generated input as a baseline when considering how best to achieve what users needed using standard Salesforce functionality rather than complex customizations. The Tokara team also brought to the task a **critical software asset** borne of its unique hybrid expertise in both Pivotal CRM and Salesforce—its **Pivotal-Salesforce Connector**. A middleware tool with pre-built connections to Pivotal and Salesforce, the connector was built to facilitate and accelerate the process of bi-directional data flow and integration, as well as data modeling and mapping.

“ Given the strength of its unique resources in both Salesforce and Pivotal CRM, I can’t think of a partner better positioned to conduct a complex Pivotal-Salesforce migration, or one who could deliver pre-built software made specifically for this task. They capably managed people, processes, and technology, and we’re very pleased with the result.

Debbie Price, CRM Manager

Success Story

“Success” requires integration, connection, and communication of relevant real-time data among as well as within the divisions— accessible to those who need it. With its access to top-tier resources in both Pivotal CRM and Salesforce, the Tokara/Stratus360 team was able to sidestep and nimbly navigate a wide range of potential pitfalls in this area during the migration itself—saving valuable time and money, and avoiding the damaging user frustration that could thwart adoption of the new platform.

When completed, the Home Building operations at The Irvine Company was **able to support all of it’s marketing, lead management, contracting, option selection, closing administration, and warranty service requirements** via a 360 degree view of every prospect/homeowner.

In addition to the residential homebuilding operations, The Irvine Company also migrated to Salesforce to support it’s Office, Retail, and Apartments Divisions. Tokara Solutions was influential in supporting The Irvine Company through these initiatives ensuring a smooth transition.

