

# WHITE PAPER

## Cloud Collaboration for Real Estate

Canter Brokerage implements a revolutionary cloud and mobile platform using HyperOffice collaboration technology - a first in the real estate industry

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A Collaboration Between:



# SUMMARY

Canter Brokerage is revolutionizing the way real estate companies communicate and collaborate internally with a unique implementation of advanced cloud and mobile technologies. Canter Brokerage, a San Diego based real estate firm, worked with HyperOffice, a leading provider of cloud collaboration technology, to create a mobile platform customized for their real estate needs to streamline processes and empower its remote workforce of agents.

## THE COMPANY

Canter Brokerage has a unique advantage over the typical brokerage in that it is a branch of the San Diego based real estate investment firm, Canter Companies. Being an arm of Canter Companies means that Canter Brokerage is able to offer agents access to the in-house resources of the marketing, transaction management, and investment teams. Canter Brokerage Agents have the entire Canter Companies team supporting them and enjoy the convenience of having everything under one roof.



**CANTER**  
C O M P A N I E S

# THE PROBLEM

## Information Sprawl

Canter Brokerage is experiencing a phase of rapid growth. As more agents continued to join the team, the brokerage began to experience the classical problem of information sprawl – a variety of systems were being used to perform functions which were essentially part of the same workflow. Canter realized that they needed to modernize the processes involved with onboarding the agents and making the resources offered to them readily available.

**INFORMATION SPRAWL**  
*occurs in a business when a variety of systems are being used to perform functions that could be part of the same workflow*

## Email overload


On a daily basis, Canter Brokerage agents submit potential properties for acquisition to Canter Companies investors, request signage and collateral material from the marketing team, and complete steps in finalizing sales with the transaction manager. Surrounding each of these tasks would be a flurry of emails and time consuming phone calls, often resulting in miscommunication. Furthermore, the agents work all over the San Diego County and are constantly in and out of the office, making it difficult for the Brokerage Director to communicate with everyone at once. Canter needed a system to facilitate back and forth communications internally while streamlining the processes of transactions, project collaborations, and marketing of homes.

# THE SOLUTION


## Cloud Collaboration with HyperOffice

After an in-depth survey of the market, Canter Brokerage chose HyperOffice, a well-known provider of cloud based communication, collaboration and mobility software.


### The Reasons:




**ONE STOP SYSTEM FOR TEAMS.** HyperOffice offers a unified system, where Canter can not only manage communication and information sharing, but also automate the entire process of submitting properties and closing real estate transactions – all within a single, tightly integrated interface, making for higher team engagement



**CUSTOMIZABLE.** HyperOffice is highly configurable, and HyperOffice and Canter Brokerage teams work together to build a solution tailored to the processes and workflows of Canter.



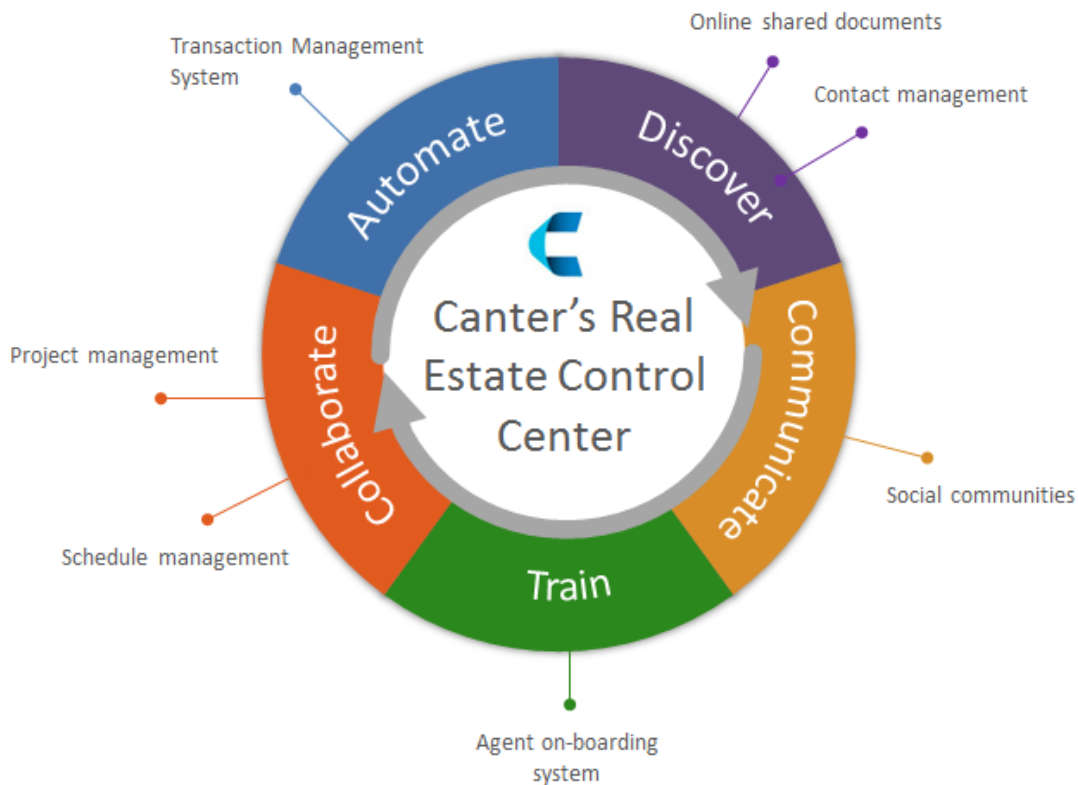
**CLOUD BASED.** HyperOffice is a fully online system, allowing Canter to implement the platform without having to dedicate extensive in house IT resources.



**MOBILE.** Since agents are mostly in the field, Canter needs a system which allows them to manage transactions and access marketing materials from their devices of choice including computers, tablets, and smartphones. HyperOffice's mobility abilities allows this.

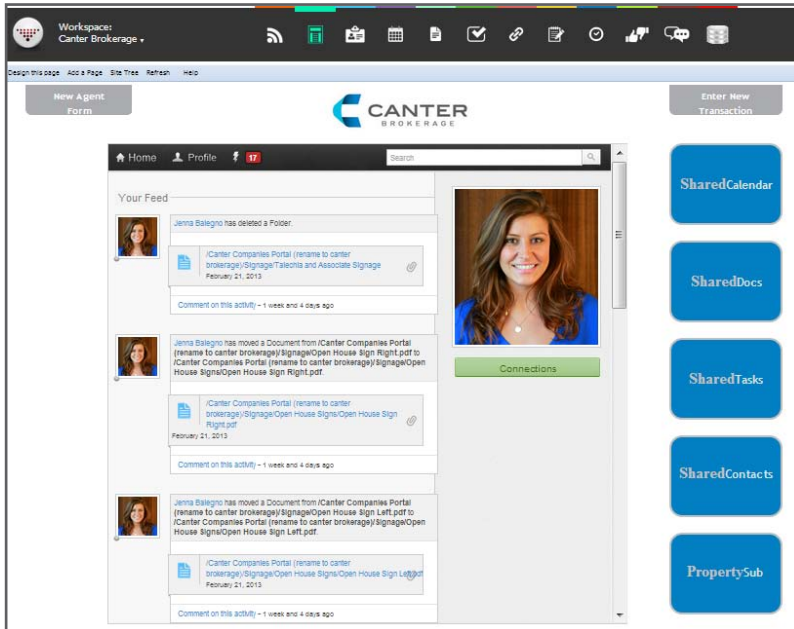
# THE IMPLEMENTATION

Canter Brokerage's Real Estate Control Center



## The Components:

- ✓ The Canter Brokerage Transaction Management System
- ✓ Online shared documents such as signage, templates, marketing collateral
- ✓ Schedule management with shared calendars
- ✓ Contact management with shared contact database
- ✓ Social communication with other agents and Canter Companies employees
- ✓ Agent on-boarding system
- ✓ Project management
- ✓ Local web drives for easy access to cloud residing folders and files
- ✓ Tablet and smartphone access



## CANTER BROKERAGE'S 'AGENT PORTAL'

- Shared Calendar
- Shared Documents
- Shared Tasks
- Shared Contacts

## TRANSACTION MANAGEMENT SYSTEM

Canter and HyperOffice teams got together to use workflow and web form tools in HyperOffice to set up a customized platform to manage all aspects of the real estate transaction process. It consists of the following steps:

1. Allow agents access to all paperwork related to transactions. Canter Brokerage set up a customized intranet page for its field agents to view and download the exact documents and templates they needed to finalize any real estate transaction.
2. Submit properties. The cloud-based intranet consists of a web-form, that is used to submit property details to Canter Companies investors and property managers.
3. Approve properties. Every time a new property is submitted, the information is collected in a database, and a property manager is notified. The property manager can then log into HyperOffice to view and approve all submitted properties.
4. Alerts. Agents can set up alerts and reminders for documents needing signatures, items up for review, and other important tasks.

**LIST OVERLOAD**  
real estate professionals focus on networking which means ever expanding lists of contacts in need of organization.

## DOCUMENT COLLABORATION

Agents have access to shared documents such as branded materials and templates. They also have the ability to upload their own documents to the same location and use the collaboration features to include others in the editing and updating of projects and paperwork.

## SOCIAL INTERACTION AND COLLABORATION

Social features built within HyperOffice are a great way to ignite internal communications. Every employee and agent gets a profile, where they can upload their picture and other details. Employees can then find each other, and have conversations.

Social tools are also a great way to monitor activity across the Canter network. Employees are able to “follow” people, documents, and projects which means they are alerted of activities and changes as they happen.

Finally, managers use social walls to conduct conversations around specific documents and projects. This is vastly more efficient and engaging than having these conversations through email.

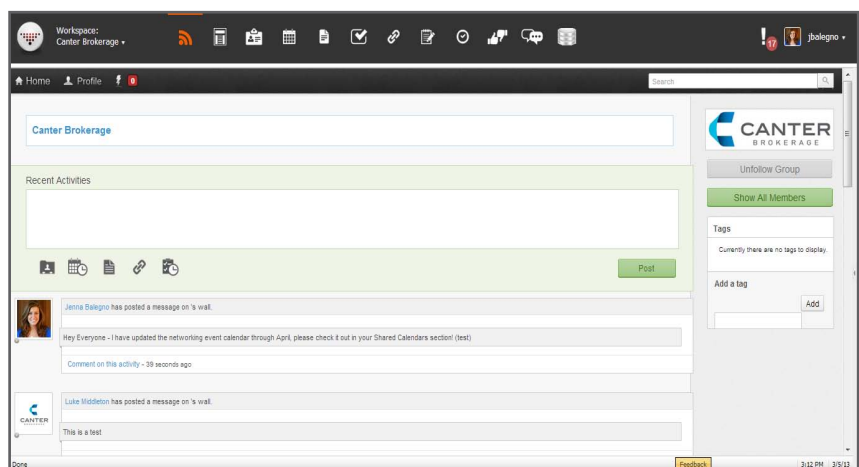
**ACCESS FOR AGENTS  
empowering each agent  
to access material  
themselves as needed  
proved to be an incredibly  
productive way to operate.**

## CANTER BROKERAGE'S SOCIAL WALL

Follow  
Employees

Follow  
Documents

Follow  
Projects



**LIST OVERLOAD**  
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organization.

## **SCHEDULE MANAGEMENT**

Each agent not only has a personal calendar that can be synced to their mobile device, they also have access to a company calendar, where managers can display important events that agents and employees should be aware of - local networking and charitable events, company events, important team meetings, public holidays.

## **CONTACT MANAGEMENT**

Contact databases give agents the ability to maintain their own private network lists. Managers can also set up group contact lists with contacts they want agents to have access to. All of this can be synced right to a mobile device providing them the convenience of having this information when and where they need it.

## **PROJECT MANAGEMENT**

Task management tools allow managers to create projects and assign tasks to team members. Assignees get notifications and can set reminders to make sure an important deadline is not missed. Team members can even follow tasks that don't involve them, but they are interested in, to get progress updates on their social walls.

## **HYPERDRIVE/WEB FOLDERS**

Finally, HyperDrive "web folders" in HyperOffice allow everyone to access files stored online right from their desktop. Agents and other employees use HyperDrive to access online files without having to log into the web UI, make edits, and have these edits immediately available to everyone else in the team. HyperDrive also serves as a great migration tool, where users can drag and drop files from their computer onto HyperDrive, and the files are instantly uploaded to their online repository.

## **NEW AGENT ON-BOARDING**

Canter set up a "New Agent" page to streamline the process of new agent onboarding. Here, new agents can easily submit all necessary information and obtain tools they need to get up and running as a Canter Brokerage agent.



# CONCLUSION

Efficiency is extremely important in the highly competitive real estate market. Having access to the right people and information at the right time can make or break a deal. Cloud and mobile collaboration through HyperOffice has helped Canter Brokerage to streamline the way agents and employees obtain and exchange information, interact with one another, and complete vital business transactions.

## ABOUT CANTER BROKERAGE

Canter Brokerage is a subsidiary of the real estate investment firm, Canter Companies, based in San Diego. Canter Companies is a full-service, private investment firm based in San Diego, CA specializing in real estate ventures. Their vertically integrated structure includes development, lending, management, capital, and construction divisions as well as an established real estate brokerage. With affiliates in the Central Valley and Bay Area, Canter Companies has the ability to offer comprehensive services throughout California and can oversee the entire life cycle of a project through acquisition, funding, development, and sales..



## ABOUT HYPEROFFICE

Founded in 2004, HyperOffice Inc., is a leading provider of online communication, collaboration, mobility and social software for businesses. A pioneer in software-as-a-service, HyperOffice integrates all the tools teams, employees, clients and partners need to communicate, collaborate, manage information and be productive from any web browser, mobile device or tablet.

