CASE STUDY: RETAIL INSITE

RETAIL INSITE
COMMERCIAL REAL ESTATE

Dyn365Pros Streamlines Retail Insite's Sales and Reporting Process

Retail Insite is a Southern California-based commercial real estate advisory firm specializing exclusively in retail properties. The company helps retailers, landlords, property owners, and investors make strategic real estate decisions through market expertise, property leasing, tenant representation, investment sales, and market research. Retail Insite combines local expertise, creative thinking, and initiative to deliver outstanding rollouts for their retail clients.

The Challenge:

As Retail Insite's business grew, so did the volume of property, tenant, and deal information its brokers and operations team needed to manage — and the demands on the reports that keep landlords and tenants informed.

Retail Insite relied on a custom solution to manage key business information and generate client reports. While it served as a repository for data and reporting, it lacked the sales-related capabilities, data structure, and user experience needed to support the firm's evolving operations.

Generating reports required pulling data from siloed solutions and performing manual processes—a time-consuming work process in a market where tenants, owners and investors expect up-to-date information in real time. Users in the old system encountered recurring glitches; a change in one area could cause other parts of the system to fail, creating ongoing frustration for the team. Their existing solution lacked features to support business process and help brokers manage client interactions and relationships.

> *"The previous system was hard to work with—glitches in one area caused other parts of the system to fail. Reports had to be pieced together from separate sources like spreadsheets and email."*

BOBBI ESLAVA
Marketing Associate
Retail Insite

Dyn365Pros Recommendation:

Dyn365Pros recommended migrating to Microsoft Dynamics 365 Sales. This provided Retail Insite with a more robust platform to support data management, relationship tracking, task management and leasing activities. Additional Microsoft cloud solutions such as Power Automate and Microsoft Word templates provide the connections and outputs required to create professional looking, branded property data sheets.

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The Solution:

Dyn365Pros partnered with Retail Insite to modernize its business application platform, using Microsoft Dynamics 365 Sales. Key deliverables of the project included:

- Migrating existing data and tables into a structured Dynamics 365 environment.
- Configuring a model-driven application tailored to Retail Insite's business processes.
- Reorganizing and extending the underlying data structure.
- Implementing business process flows to guide users through standardized workflows.
- Developing custom Power Automate workflows to automate report generation.
- Creating Word-based templates for highly customized branded documents.
- Creation of tenant-facing and owner-facing reports from account and property records.
- Providing user training to support adoption of the new platform.

> *"Reports that once took hours to compile from scattered spreadsheets and emails now come together in real time as brokers capture notes on marketing calls — and the team can track deal status and progression across brokers, support staff, and teams."*

KAROLYN DALE
Director of Operations
Retail Insite

The Result:

By moving to Dynamics 365 and working with Dyn365Pros, Retail Insite gained a more scalable, business-focused platform aligned with how brokers, marketers, and operations personnel work — replacing a system that functioned primarily as a reporting repository. The new solution enabled centralized management of properties, tenants, accounts, and opportunities in a single platform.

Following go-live and a brief adjustment period, Retail Insite requires only occasional support. With the CRM foundation in place, the firm is now expanding its use of Dynamics 365 to include property owner records, a fuller sales cycle, data cleanup, and Outlook integration. In addition, Retail Insite now has a scalable foundation for future enhancements, including revenue and commission projection.

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