



Client Success

Partners Capital

partners

Market
Commercial

Portfolio
1.5 million commercial square feet

Client Since
2021

Highlighted Product
[Yardi Deal Manager](#)

The Benefits
Partners gains a one-stop shop to manage a fluid portfolio with Yardi Deal Manager built into its Yardi Voyager platform. Centralized data and document transfer eliminate manual efforts and help get deals done faster.

About Partners Capital
[partners.com](#)

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[Yardi.com](#)

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Sales@Yardi.com



“ The Yardi platform including Deal Manager has significantly elevated our capabilities across the board. We’ve become more sophisticated, timely and accurate — which makes Partners not just a better landlord, but an even better fiduciary for our investors. ”

Kelli Walter, Partner, Asset Management

The Company

Partners is one of the largest and fastest-growing independent commercial real estate firms in Texas. Based in Houston, the company provides full-service solutions for office, industrial, retail, land, life sciences and multifamily product types. Partners offers brokerage, investor and project services as well as valuation advisory.

Partners Capital is the firm’s private equity arm, which includes an investment management platform specializing in the acquisition and disposition of office, industrial and retail multi-tenant properties. The investment management team runs numerous fund vehicles that buy and sell property with the goal of generating competitive returns for investors.

The Challenge

Managing a Fluid Portfolio with Disparate Systems

With a small team and frequent acquisitions and dispositions, using disconnected systems to manage brokers and leasing transactions created challenges. In addition, the lack of a dynamic feedback loop between property management and deal management led to inefficiencies, including manually hunting down tenant information.

The Solution

Deal Management Built Into a Connected Platform

[Deal Manager is an intuitive CRM and deal-making tool](#) that simplifies revenue management with complete visibility of deal metrics throughout the lease lifecycle. With the Yardi property management software integration, clients gain real-time tenant and lease data, including schedules, expenses and clauses.

This seamless sync provides access to current unit availability, floor plans and interactive stacking plans, ensuring a complete portfolio overview and a 360-degree view of the company’s client base. Additionally, centralized communication streamlines workflows by enabling users to enter deal terms, track proposals and calculate and store net effective rent at the deal level. At the same time, automatic budget comparison and lease spread metrics ensure stronger decision-making.



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The Story

A One-Stop Shop for Asset and Transaction Management

The industry has embraced a single connected platform for portfolio management as a best practice, and Partners has taken the same approach. When Partners adopted Yardi Voyager as their property management and accounting solution, they also implemented Deal Manager to gain all the benefits of a one-stop shop, according to Kelli Walter, partner of asset management for Partners.

"Our portfolio is very fluid. We buy and sell properties frequently, with the asset class and tenant mix constantly evolving. Our lean asset management team facilitates all leasing transactions, along with managing brokers, and needed a tool to keep us organized and help us underwrite tenant credit quickly and accurately. Deal Manager solves all these issues for us," Walter said.

Centralized Data and Key Metrics

Deal Manager's holistic tie-back to Voyager was the most significant selling point for Partners, according to Walter. With Deal Manager synched seamlessly with the Voyager platform, Partners gains numerous operational efficiencies, including a document repository, deal stage history and valuable metrics. Tenant information is always up to date, which means deal metrics are also up to date.

Document transfer from Deal Manager to Voyager is a massive benefit for Partners. The feature "allows us to efficiently aggregate information from essentially pre-leasing to translating to tenant files in one fell swoop, which saves leasing and property management time," Walter explained.

The firm utilized another deal management tool for years, but once they moved their business operations to the single Yardi platform, they found that Deal Manager was superior to the tool they previously used, particularly as part of the "Yardi ecosystem," as Walter described it.

Greater Efficiency and Simplified Lease Renewals

Walter noted that Deal Manager is very valuable to Partners' leasing process. Deal Manager has benefited Partners' brokers, property managers and executive team alike — and they all love using it. When asked about the most considerable operational improvements Partners has gained using the deal management solution, Walter replied, "Efficiency including easier lease renewals! We don't have to hunt for tenant information anymore."

Walter also mentioned other process improvements and time-saving efficiencies, including "more consistent, robust document storage [and] more timely entry of deals from pre-leasing onto the rent roll. Analytics on our rent rolls have also been a huge



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benefit. Reporting in Deal Manager is better than our former system provided. We've also experienced time savings thanks to centralized data and automation, including having reliable information and not needing to do 'clean-up work' after the fact."

Advice to Peers Seeking Better Deal Management

Walter had some advice for firms considering adopting a tech solution to optimize deal management. "The world is only getting faster. If you're not using Deal Manager or a tool like it, you'll continue to fall behind. Deal Manager gets people out of email, organizes deals and data exceptionally well and simplifies the credit underwriting process for leasing — which makes it faster to get deals done. It also provides extremely valuable transparency into the deal curation process that can be used to analyze the effectiveness of your lease and asset management teams."

Partners Capital has also implemented [Yardi Voyager Commercial](#)