

CASE STUDY

Restoring Operational Control in a Complex Yardi Environment



Results at a Glance

- ✓ Faster, more consistent workflows with fewer workarounds.
- ✓ A reliable single source of truth for financial and operational decisions.
- ✓ New properties onboarded efficiently without operational disruption.
- ✓ Fewer system issues, reduced downtime, and less rework.

The Challenge

A global investment manager and real estate services provider was undergoing a significant transformation, including changes to its internal support structure, while continuing to scale its portfolio. This convergence surfaced growing concerns around operational inefficiencies and the organization's ability to scale effectively.

Operating across multiple property management

systems had created a fragmented environment. Data inconsistencies were common, onboarding new properties was slow and manual, and reliance on disconnected platforms made issue resolution reactive and unpredictable. As growth accelerated, the existing systems and support model could no longer keep pace.

The firm faced an urgent need to upgrade and consolidate its technology landscape to restore operational control, reduce risk, and support future growth.

The Solution

Atlas Global Advisors was initially engaged to provide day-to-day Yardi support during a period of organizational and system change. Early in the engagement, it became clear that gaps in the original system configuration and data conversion were creating downstream issues that extended beyond routine support. To stabilize operations and protect reporting integrity, Atlas Global stepped in

to take on a broader role spanning system remediation, implementation support, and reporting optimization.

Comprehensive System Overhaul

Atlas Global led a targeted remediation effort to correct configuration issues and address inconsistencies introduced during the original conversion. This included validating data integrity, realigning system setups with operational workflows, and strengthening integrations to ensure the Yardi environment could reliably support the organization's scale and complexity.

Reliable Day-to-Day Operational Support

Alongside remediation work, Atlas Global provided consistent Tier 1 and Tier 2 support that became foundational to daily operations. Issues were addressed proactively, minimizing disruption and restoring confidence in the system across teams. Support extended beyond Yardi where needed, ensuring continuity across the broader technology ecosystem.

Expert Property Onboarding and Reporting

As the platform stabilized, Atlas Global took ownership of ongoing property onboarding and reporting needs. New properties were onboarded using standardized processes, and custom reports were developed to deliver accurate, actionable insights for stakeholders. This ensured reporting aligned with operational realities and executive expectations.

The ROI

✔ Operational Efficiency

By consolidating fragmented systems into a single

Yardi environment and correcting configuration issues, day-to-day workflows became faster, more consistent, and less dependent on workarounds.

✔ Improved Data Integrity

Stabilizing the system configuration and reporting structure established Yardi as a reliable source of truth, improving confidence in financial, operational, and portfolio-level decision-making.

✔ Scalable Growth Enablement

With standardized onboarding processes and a stable platform, new properties can now be onboarded efficiently without disrupting existing operations.

✔ Lower Support and Rework Costs

Proactive Tier 1 and Tier 2 support, combined with remediation of prior conversion gaps, reduced system issues, minimized downtime, and lowered the cost of ongoing operational support.

Atlas Global Advisors did more than provide support, they stabilized a fragile environment, corrected foundational issues, and built a scalable operating model. The result was a platform the organization could rely on to support growth, improve efficiency, and reduce operational risk.

Implementation & Managed Services for Yardi

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