

**CASE STUDY**

# Building A Scalable Training Model for Unified Yardi Adoption



## Results at a Glance

- ✓ Achieved full platform unification
- ✓ Accelerated onboarding, provisioning new hires within 48 hours.
- ✓ Increased user confidence and retention through role-based training.
- ✓ Improved accuracy and efficiency in UAT-to-production transitions.
- ✓ Reduced help desk dependency with fewer support requests in the first 90 days.

A large private equity firm overseeing multiple property management entities operated with four third-party managers using different systems. To streamline operations and improve reporting consistency, Atlas Global Advisors consolidated all managers and corporate teams into a single Yardi Voyager instance, providing end-to-end implementation, training, and ongoing support.

## The Challenge

Despite the system consolidation, the client struggled with inconsistent Yardi usage and limited onboarding processes. Users lacked adequate training during project rollouts, and new hires were left dependent on a few internal “power users” for support. These issues led to data entry errors, compliance gaps, and inefficiencies that hindered both day-to-day operations and executive reporting accuracy.

## The Solution

Atlas Global Advisors implemented a dual-path training and onboarding program tailored to the client’s complex, compliance-driven environment.

### Project-Based Training Model

For every new implementation or module rollout, Atlas Global delivered targeted, project-specific training sessions aligned with UAT testing scripts and approved workflows. A dedicated training

environment, mirroring the client's live instance, allowed users to practice with real data safely. Depending on client needs, sessions were delivered as train-the-trainer programs or extended end-user workshops.

#### New Hire Onboarding Process

A formalized onboarding process was established through Atlas Global's internal ticketing system. Each new hire request followed a structured provisioning form to ensure correct property, menu, and security access, enabling consistent, compliant setup within 48 hours.

#### Ongoing Functional Training by Role

To sustain long-term system literacy, Atlas Global designed a recurring, role-based training curriculum segmented by Accounting, Property Management, Compliance, and Leasing. This ensured that every user received relevant, context-driven instruction for their functional area.

## The Results

#### Faster Onboarding

New hires were provisioned within 48 hours, reducing delays and dependency on internal resources.

#### Higher Training Retention

Role-based sessions improved engagement and confidence, resulting in fewer early-stage support requests.

#### Improved Accuracy

Training aligned with UAT scripts increased fidelity between test and production environments.

#### Reduced Support Reliance

Fewer help desk tickets were reported within the first 90 days of employment.

#### Unified Platform Governance

Bringing all managers onto one Yardi instance created a single source of truth for data and performance reporting.

## Implementation & Managed Services for Yardi

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