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Data platform implementation plan.

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Practical info about real estate data.

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There are four key data domains that create the foundation of a real estate company's data platform. These are important to get **right** before other domains are implemented.

PROPERTIES

UNITS

LEASES

TRANSACTIONS

Some property management systems have all of these domains while others only have the first three, which is why accounting systems are important to integrate after the PMS

Implementation Process.

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STEP 1

Spend half a day together

Onboarding

INTRODUCTION WORKSHOP

Description of platform
Understanding of strategy
Walkthrough of databases

STEP 2

4 weeks

Technical Integration

INTEGRATION OF SYSTEMS

Connect to databases
Data integration
Testing and quality assurance

STEP 3

4 to 8 weeks

Business Integration

REPORT PRODUCTION AND TRAINING

Report production
Report validation
User adoption and training

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STEP 1

Spend half a day together

Onboarding

INTRODUCTION WORKSHOP

Description of platform
Understanding of strategy
Walkthrough of databases

PARTICIPANTS

- Core business team overseeing implementation
- Data system expert(s)

TO DO

1. Intrava explain process
2. Intrava introduce support system
3. Business team explain information used from respective systems for reporting
4. Data system experts walk through data systems (e.g., Yardi, QuickBooks) and show how they generate reports
5. If needed, customer introduce Intrava to technical contact from data system vendor(s)

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STEP 2

4 weeks

Technical Integration

INTEGRATION OF SYSTEMS

Connect to databases
Data integration
Testing and quality assurance

PARTICIPANTS

- Data system expert(s) from customer
- If needed, technical resource from data system vendor (minimal involvement required)

TO DO

1. Intrava gets access to databases
2. Intrava starts setting up db connectors
3. Sporadically communicate with participants to navigate integration. This will not consume a lot of hours. It is more of a sporadic Q&A process

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STEP 3

4 to 8 weeks

Business Integration

REPORT PRODUCTION AND TRAINING

Report production
Report validation
User adoption and training

PARTICIPANTS

- Core business team overseeing project
- Data system expert(s)
- Department champions

TO DO

1. Business integration kick-off meeting
   - Core business team and Intrava prioritize dashboard and report development
   - Agree on sprints and feedback sessions
   - Intrava release basic reports/lists to validate data quality and interpretation
2. Core business team and department champions audit reports and provide feedback
3. Schedule sporadic training sessions

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BUSINESS AS USUAL

Perpetuity

Post Setup

ONGOING SUPPORT

Monthly status calls
Sporadic training and support
Call, Slack, or email us

COLLABORATION

- Intrava administrates platform
- Business users send requests via support
- Monthly status calls with internal champions
- Sporadic training and support

From this point on the system will naturally evolve through collaboration. We are your data department and welcome new report challenges and ideas.

When you want to integrate new systems we will go through the same process, though it will likely be quicker.

Roles, involvement, and responsibilities.

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	INTRAVA	CORE BIZ TEAM	END-USERS
WHO	▪ Data engineers ▪ Report developers	▪ Core business team ▪ Database expert(s)	▪ Department champions ▪ Rest of organization
TASKS	▪ Database integration ▪ Data warehouse setup ▪ Report development ▪ Data quality assessment	▪ Organize and prioritize needs ▪ Data validation and QA ▪ Report validation ▪ Help dev team navigate DBs	▪ Organize and prioritize needs ▪ Data validation and QA ▪ Report validation ▪ Participate in training sessions
INVOLVEMENT	▪ Technical integration: *High* ▪ Business integration: *High* ▪ Post setup: *Medium*	▪ Technical integration: *Low* ▪ Business integration: *High* ▪ Post setup: *Medium*	▪ Technical integration: *None* ▪ Business integration: *Medium* ▪ Post setup: *Medium*
STEP IN PROCESS	▪ All steps	▪ All steps	▪ Step 2 ▪ Step 3

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INTRAVA RESPONSIBILITIES

Data engineers
- Setup database connectors
- Populate and modify data warehouse
- Program business rules
- Monitor, administrate, and improve data platform

Report developers
- Communicate with end-users
- Develop reports
- Quality control reports
- Relay data changes to data engineers
- Training

CUSTOMER RESPONSIBILITIES

Core business team
- Prioritize databases to be integrated
- Prioritize reporting needs with department champions
- Quality control reports *(always be critical of the data)*

Database expert(s)
- Help data engineers navigate database(s) during setup
- Facilitate contact between data engineers and database vendor(s)

Department champions
- Quality control reports *(always be critical of the data)*
- Provide feedback on reports
- Collect and prioritize reporting needs for respective department

End-users (rest of org.)
- Quality control reports *(always be critical of the data)*
- Communicate report needs to department champions
- Submit questions and comments to support portal or send to support@intrava.io

Customer Preparation.

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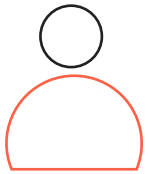
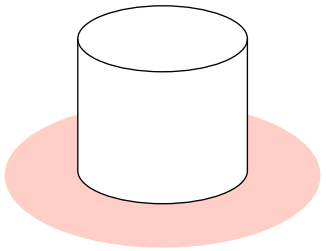


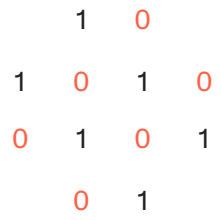
STAKEHOLDERS

- Identify core business team
- Identify data system expert(s)
- Identify department champions



DATA SYSTEMS

- Discover database connection options (direct access is preferred over APIs)
- Facilitate database access (often requires vendor involvement)



DATA

- Share core business reports
- Define key performance indicators

Implementation Timeline.

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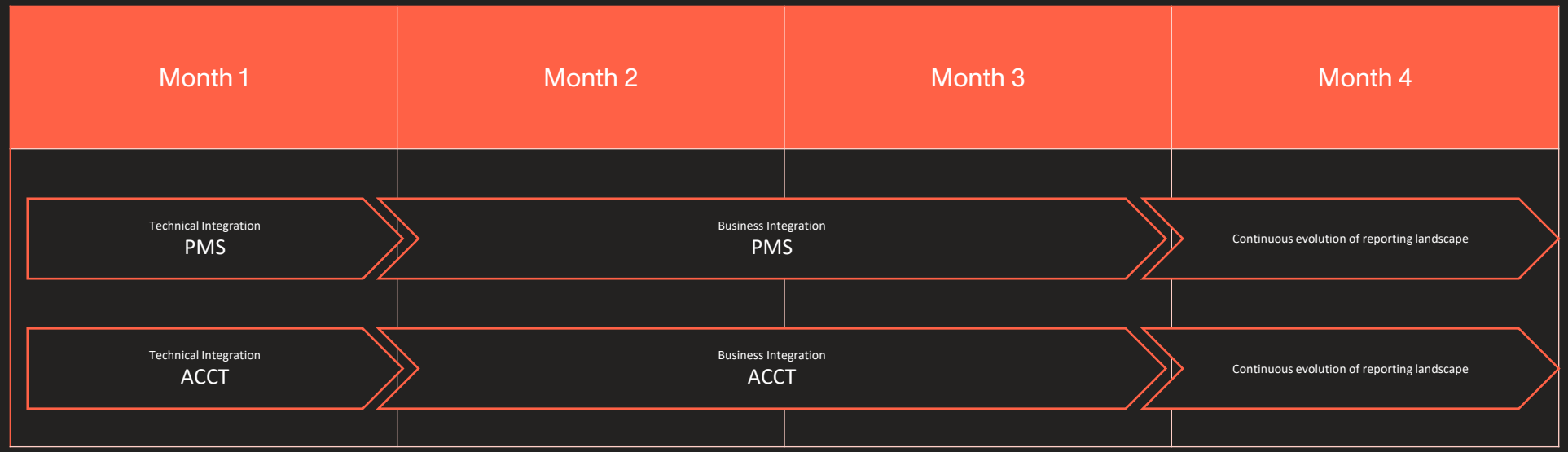
Month 1
Month 2
Month 3
Month 4
Technical Integration
PMS
Business Integration
PMS
Continuous evolution of reporting landscape
Technical Integration
ACCT
Business Integration
ACCT
Continuous evolution of reporting landscape

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If you have questions please contact:

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Better data visibility.

Better decision-making.