



SHANNON
WALTCHACK

CASE STUDY

RUNNING THE BUSINESS ON DATEX

AUTOMATION AND RESPONSIVENESS
DRIVE UNPRECEDENTED RESULTS



COMPANY OVERVIEW

ABOUT SHANWALT

Shannon Waltchack (“ShanWalt”) is a vertically-integrated commercial real estate operator based in Birmingham, Alabama. They operate and manage a portfolio of 128 properties, including an in-house owned investment portfolio and third-party clients. The company’s primary assets are Retail, with some Office and Flex-Industrial.

The company’s Core Values are the “North Star” that keeps ShanWalt focused on helping people maximize value, build wealth, see the future, cultivate relationships and make great decisions.



HOW SHANWALT TRANSFORMED OPERATIONS

CASE STUDY IN BRIEF

ShanWalt faced the challenge of managing a growing portfolio across departments, processes and stakeholders. They recognized an opportunity to create value by better channeling their large data sets, which were fragmented across spreadsheets and complex workflows. This fragmentation yielded departmental silos, created inefficiencies, and left the team with a lack of trusted, real-time insights.

The Datex platform enabled ShanWalt to realize its goal of scaling the business and organizational efficiency through a shared source of truth that delivers systematic, repeatable automation and seamless manageability.

By leveraging **Datex's Test Drive** program, in just 3 weeks ShanWalt built confidence that they had quality data inputs, a clear and timely path to implementation, and gained direct, hands-on proof that their people would embrace the solution. Combined with Datex's best-in-class training and support, ShanWalt implemented a platform that streamlined their operations, drove better leasing deals, and which delivered better reporting, decision-making, and communications.



IMPROVED
COLLABORATION



STREAMLINED
WORKFLOWS



BETTER DEALS
BETTER REPORTING



CHALLENGE: SILOED DATA & WORKFLOW INEFFICIENCY

ShanWalt's data was scattered across departments, creating a **"clunky"** workflow and ineffective communication. Compiling reports was a manual, time-consuming process that hindered efficiency. The company's existing software was inflexible and unresponsive to their needs, leading to significant friction.

Andrew Patterson, President, recalls a frustrating environment where coordinating people and process was a constant struggle. ***"We had stuff in spreadsheets... We had stuff in Yardi... and there was nothing we could use to easily slice and dice information to have at our fingertips in terms of what we're doing to manage the portfolio."***

The ShanWalt team needed an automation platform that could centralize their data into a single-source-of-truth, streamline communications, and empower them to make better decisions.

SOLUTION: A SINGLE SOURCE OF TRUTH DRIVES ACTION AND AUTOMATION

Datex provides a unified platform that centralizes all of ShanWalt's data, as well as supports unstructured data like comments, documents, and notes. This provides a comprehensive, real-time view of their portfolio, allowing all departments, from leasing to asset management, to access the same reliable data. The system is synced throughout the day to ensure the data is always fresh, and this single source of truth has transformed how ShanWalt monitors its performance and makes strategic decisions.

"We just had a lot of information scattered about between different departments... this just brought everything under one roof. From a collaboration standpoint, everyone has access to it and can use it, all the way from the leasing and broker's team to the executive level."

With a single-source-of-truth, Datex enables actionable insights and deep automation across departments.



*"This has definitely streamlined
how we operate."*

– Andrew Patterson, President





SOLUTION: AUTOMATED LEASING FOR STREAMLINED RESULTS

Datex supports the entire Leasing Deal cycle, from deal tracking, calculation of deal terms (including rent schedules, deal costs and financial summaries), and deal approval, to forecasting, pipeline management and leasing activity reporting. The Datex platform allows for the creation of custom workflows that perfectly matched ShanWalt's unique needs. A key example is their process for underwriting and approving tenant leases, which previously was *"very, very clunky."*

Andrew explains, *"With Datex, we built out a specific workflow that involves different departments and approvals before we get the lease signed, all the way to getting the lease signed, and then a post-execution task for property management and accounting to implement. They tailored that 100% to our needs. It has made that process so, so much more streamlined."*

"So, both on a reporting standpoint and our ability to actually keep up with things and get things moving through the system and check on where they are and have them communicate with each other, it's been just a huge difference."

"They tailored that 100% to our needs... it has made that process so, so much more streamlined."

– Andrew Patterson, President

SOLUTION: BETTER REPORTING AND PREDICTABILITY WITH EASE

In the past, the monthly management reporting process to clients, partners and investors at ShanWalt required dozens of spreadsheets, PDFs and complex coordination across multiple departments. By implementing Datex's Monthly Management Reporting module, ShanWalt now executes complex reporting workflows with ease, predictability and efficiency. The result is better reports, and better quality, branded reporting packets in seconds.

“Now we use Monthly Management Reporting pretty heavily. We use it for monthly reporting, quarterly reporting, and two internal reports that we have: accounts receivable reporting and variance reporting.”

Far more than stock reports from MRI or Yardi, Datex takes your existing data, financial formats, account groups, account trees and attributes to build best-in-class automated reports that have been battle tested in the field for over 20 years. This combines with Datex automation to deliver intrinsically better report packets, complete with high-value narratives and inline comments, and a final product that delivers better governance, repeatability, and branded professionalism. And with cross-department workflow management, you always know your report packets will get out on time with the highest quality and predictability.

“As a manager or an executive team, you can look at it and see what's done and what's not. It's no longer a manual process. You can see the status of everything from start to finish and where it is in that process. That's beneficial.”

“There's a lot less friction within the team and an ability to get things done.”

– Andrew Patterson, President





SOLUTION: MORE PRODUCTIVE CROSS-DEPARTMENT TEAMS

The Datex platform serves as a central hub for collaboration, breaking down departmental silos by putting a wealth of information directly into the hands of every team member. Now all departments can look up data and run reports on their own, without having to make requests to accounting. This new level of accessibility has empowered the team to make faster decisions and made ShanWalt more agile.

“With Datex, access to stuff is really all in the system. We want to put information at people's fingertips so they can make decisions and be responsive to others quickly. So, it has definitely helped in that regard, to be able to look everything up and have it right there without having to go ask somebody in a different department.”

“With Datex, access to stuff is really all in the system.”

– Andrew Patterson, President

SOLUTION: EXECUTIVE DASHBOARDS DELIVER SPEED & INSIGHTS

ShanWalt collaborated with Datex to design Executive Dashboards to quickly inform strategic decisions and allow leaders to dynamically review the business.

“They built out an Executive Dashboard for us that had a ton of details and stuff we wanted to track. We now have all the information at our fingertips. Previously, for us to manually put that together on a monthly or quarterly basis took a lot of manpower and a lot of work. And then a lot of questioning, ‘Is this information right?’ or, ‘Did we fat finger something?’”

“Now I can look at that dashboard and slice and dice it by different portfolios and different funds. It runs in a matter of five seconds, really! You push the button and select which fund you want to run, and it'll run the information for you. It's been a real help for us.”

“When we finished, we said this is the best dashboard we've ever built.”

– Andrew Patterson, President



“Their responsiveness is the best I’ve experienced.”

– Andrew Patterson, President



SOLUTION: ALWAYS IMPROVING & A PARTNER ABOVE THE REST

Datex’s unparalleled responsiveness is a key differentiator. In an industry where software providers are often slow and distant, Datex has shown a genuine commitment to their clients. Datex holds bi-weekly calls with ShanWalt’s team, actively seeking feedback and often implementing changes within a matter of days. This level of partnership gives ShanWalt confidence that their voice is heard and that their needs are a priority.

“What I would say really sets them apart is their responsiveness. They definitely have a good team, a good product, and a good program. They’re always thinking of ways they can make the product better and address issues we have. You don’t get that very often with software companies or data companies. We’ve been able to tailor a lot of things to our specific needs, which has been great and really helpful to our business. Their culture is definitely, ‘How can we improve the product and improve your experience?’”

SOLUTION: TEST DRIVE & SEAMLESS ONBOARDING PROCESS

Datex's Test Drive experience is unique in the real estate software industry and made the decision to partner easier for ShanWalt. They could try the system using their own data before purchasing, which Andrew Patterson found to be a *"huge help"* in mitigating risk.

"Software companies just don't do Test Drives..., at least in the property management and asset management space. The Datex Test Drive was definitely something that we took advantage of and was great for us to look at it, work on it, and say, 'Hey, yeah, we can see ourselves doing this.' It was reassuring. And they were able to get it set up pretty quickly. It was really easy to do."

When it came time to roll out the platform, a clear, staged schedule, and weekly calls ensured a smooth implementation. *"The onboarding was very seamless and very easy for us to do. Usually, software integrations are just painful, and this one was not. They even visited our office to do in-person training, which just doesn't happen very often with software providers."*

"The Test Drive was great for us. It was reassuring."

– Andrew Patterson, President



TANGIBLE RESULTS & SURPRISING BENEFITS

CONCLUSION

Datex is more than a software provider; it is a true partner in innovation.

ShanWalt's collaboration with Datex has delivered substantial, quantifiable benefits. By eliminating manual data aggregation and providing powerful reporting and automation tools, Datex has enabled ShanWalt to become significantly more efficient and effective.

The creation of a customized Executive Dashboard, which compiles and visualizes critical portfolio data in seconds, has been a game-changer.

Andrew Patterson had high expectations, but he was most surprised by the level of responsiveness from the Datex team, which he characterizes as being, *"The best I've ever experienced."*

"Datex has been a true partner. We'll say, 'Hey, can we do things this way?'... And they're always like, 'Yeah, let's figure out a way to do it.'"



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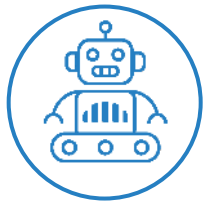
DATEX: HOW IT WORKS

Datex makes managing your retail, commercial, or multifamily portfolio **faster, smarter, and easier!**



Actionable Reporting

Our best-in-class reporting library lets you instantly see your portfolio based on your work, not the data.



Intelligent Automation

Datex integrates, structures, and manages your workflows based on your custom rules.



Insights for Everyone

Extend the reach of your MRI/Yardi data to your whole team.



Designed for:
mri REAL ESTATE SOFTWARE **YARDI**

50% \$1MM 65%

TIME-
SAVINGS

OVERHEAD
SAVINGS

REVENUE
GROWTH

TYPICAL DATEX CLIENT RESULTS

Our clients have more than **4 departments** using
Datex to simplify their work and break down silos

EVERY DAY!

On average, Datex clients save over
\$1MM in overhead while supporting
65% management revenue growth by tapping into
the power of their data.

datex

PROPERTY SOLUTIONS



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