Atlas Global

CASE STUDY

Digitizing Reporting for a Global Retail REIT



Results at a Glance

- Standardized reports across all functions to create a unified reporting framework.
- Eliminated redundant Excel, Word, and PowerPoint files to reduce manual effort.
- Improved transparency and data consistency across departments.
- Identified automation opportunities to guide future system enhancements.

A large global retail REIT managing a diverse portfolio of super, regional, and outlet centers faced growing inefficiencies due to manual reporting processes. Property management, accounting, leasing, and FP&A teams relied on a patchwork of Excel, Word, and PowerPoint reports, many duplicating data already stored in Yardi. Recognizing the operational risks and wasted time, the client partnered with Atlas Global Advisors to modernize and automate its reporting infrastructure.

The Challenge

Despite using Yardi as their primary ERP, fragmented reporting habits created data silos and version control issues. Property managers maintained local spreadsheets, regional teams built presentation decks, and accounting relied on separate workbooks for reconciliations, all with overlapping data sources. This inconsistency made it difficult to validate performance metrics, align executive dashboards, and maintain audit-ready transparency.

The Solution

Atlas Global Advisors led a comprehensive digitization initiative to consolidate and automate the client's reporting framework within Yardi.

Comprehensive Report Collection

We cataloged every recurring and ad hoc report across the organization including Yardi-generated, Excel-based, and manually compiled. Reports were

grouped by function and frequency to establish a complete baseline.

Report Mapping and Gap Analysis

Each report was mapped to standard or custom Yardi reports. When Yardi functionality met the need, we documented replacement opportunities; when partial, we proposed enhancements via calculated fields, additional metrics, or integration with tools like YSR or SQL exports.

Automation and Functional Enhancements

The analysis uncovered broader system opportunities like replacing manual processes such as vacancy tracking and move-in/move-out checklists with Yardi's built-in Maintenance, Inspection, and Correspondence modules.

The Results

Unified Reporting Framework

The project delivered a clear, structured reporting inventory showing which reports could be replaced, enhanced, or retired.

50% Process Efficiency Gain

Digitization reduced manual report preparation time and standardized outputs across all business units.

Deeper Process Insights

Only 30% of existing reports were fully digitized before the project, revealing opportunities for further automation and optimization.

Scalable Roadmap

The initiative created a foundation for continuous improvement, guiding future reporting automation and digital transformation initiatives.

Implementation & Managed Services for Yardi

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