



# case study



Industry: Engineering, Construction & Real Estate



Products Used: Sales Cloud

## Company Overview

Cotality accelerates data, insights, and workflows across the property ecosystem to enable industry professionals to surpass their ambitions and impact society. With billions of data signals across the life cycle of a property, we unearth hidden risks and transformative opportunities for agents, lenders, insurers, governments, and innovators.

## Challenges

Cotality identified several areas where greater alignment was needed to ensure a cohesive operation:

- **Disconnected Systems:** The newly acquired Property Marketing function was operating independently, with no integration into the core CRM.
- **Process Misalignment:** Teams were using varying processes, leading to inefficiencies and a lack of coordination.
- **Unstructured Integration:** There was limited clarity around how APIs and workflows should connect across the businesses.
- **Inconsistent Reporting:** Leadership lacked a single source of truth, with reporting fragmented across teams and systems.

## Solution

Mint® partnered with Cotality to unify their systems:

- **Scoping & Stakeholders:** Mint® ran sessions to define needs, goals and processes.
- **Custom Sales Process:** Salesforce® was updated to reflect Property Marketing's workflows and roles.
- **API and Data Merge:** Secure integration and data migration brought systems together.

## Results

- **Unified CRM:** One system now serves both teams, with shared data and workflows.
- **Improved Collaboration:** Sales and marketing alignment enables smarter client engagement.
- **Enhanced Oversight:** Dashboards deliver combined business insights across entities.



"Mint® guided us through a complex integration and delivered exactly what we needed, on time and on point."

*David Price, Property Marketing Director*

## Conclusion

By bringing Property Marketing into Cotality's Salesforce® environment, Mint® enabled a smoother post-acquisition transition and unlocked operational synergies. From discovery to delivery, the project created structure, efficiency and clarity. It's a perfect example of how Mint® helps clients maximise their CRM through growth. The integration has also laid a solid foundation for future scalability and innovation across the combined organisation.

### Merging systems after an acquisition?

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To learn more about how Mint® can help transform your Salesforce experience, scan the QR code to visit our website.



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