

# anthemIQ

## Lee & Associates Irvine Leverage AnthemIQ to Streamline and Scale



Headquarters:  
**Irvine, California**



Brokerage Size:  
**Enterprise**

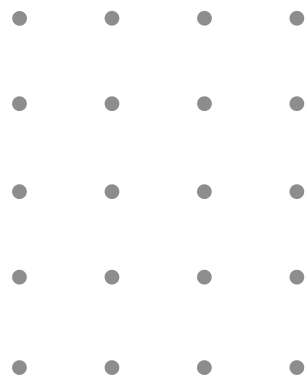


Brokerage Specialties:  
**Tenant Representation,  
Landlord Representation,  
Portfolio Management, Capital  
Markets**



Website  
<https://www.lee-irvine.com/>  
<https://smithcre.com/>

Lee & Associates is a commercial real estate brokerage, management and appraisal services firm. Today, the Lee & Associates group of companies is one of the largest commercial real estate providers with regional expertise in the United States. As a group of independently owned and operated companies, the firm currently has 63 locations across the nation and Canada.



## Better collaboration for bigger clients

Justin Smith, SIOR is a Senior VP and team leader at Lee & Associates in Irvine, CA. Justin has completed over 500 assignments nationally, representing roughly half a billion dollars worth of consideration, and 7,500,000 square feet. In addition to hosting a number of industry-specific public platforms, Justin authored “Industrial Intelligence: The Executive’s Guide for Making Informed Commercial Real Estate Decisions”.

Justin and his team have always been very active in the tenant representation space, yet they continuously look for ways to improve internal processes and better serve their clients. Upon discovering AnthemIQ, they took advantage of the platform as a quick way to make strong improvements.

## Out with the old way of presenting

Prior to using AnthemIQ, Justin and his team allocated lots of time and resources into the creation and distribution of information to active and prospective clients.

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Beforehand we would get stuck in making these large PDF presentation books and presenting in person and mailing out these hundred page books filled with market surveys and with brochures.

They wanted a more efficient process that would clearly and immediately differentiate their level of service from that of their competitors.

The experience is different for the client in that they see a lot of brokers present in the same manner and it may be with different graphics, but it's the same process and a very similar pitch.

In using AnthemIQ, the team can now organize all client-facing deliverables in a single, modern place, which not only saves time and resources internally, but also provides both the team and its clients with a centerplace for collaboration.

What I found very helpful is with the client experience now, their whole team can be live in the pitch, they can all go through a demonstration together, and then they'll all have their own login and access where they have a dashboard that's set up and customized for their needs.

We've had clients be very happy to be able to do that on their own and to have all changes in market surveys and in brochures and in touring schedules in real time.

## **A professional platform that better supports larger clients**

When working with large clients, the team has to address more decision makers from different functional areas. In AnthemIQ, new stakeholders can be invited during the appropriate stages of a deal cycle, so that decisions can be made more efficiently and clients can get into space more quickly.

“ AnthemIQ has allowed us to be able to present to larger organizations more effectively so that they can have all people within the decision making process have access to the information... and then we can add new decision makers and new influencers that are in the decision making process or on the investment committee as they need to be added to the portal

Success with larger clients can translate to additional work that expands to other markets. One key advantage of using AnthemIQ is that brokers can work with their clients from anywhere.

“ Sometimes we'll have a weekly meeting with clients where we'll navigate [AnthemIQ] for them and with them together real time, they're in Dallas and we're in SoCal. I love being able to just quickly have the whole project right in front of you. And then everyone who needs to be there to be able to present it and include other service vendors and other team members. I found that part really helped.

When a substantial client is on the line, we know it's difficult for anyone to trust a new way process, regardless of whether or not there is promise of improvement. Justin Smith and his team trusted AnthemIQ as a way to better their clients, and we're grateful to have a successful partnership as a result.

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I was able to work on a large e-commerce assignment where I had Anthem in there with the whole executive team. And it was a great personal risk for me being like, okay, do I feel confident enough in my abilities to use the platform for a large assignment? **It ended up being a fantastic experience and for me, for the team and for everybody involved.** It was interesting to think through site selection, the digital survey, the tour, adding all the pictures and the videos. All that was fantastic. That was my first time looking at multiple RFPs and results and being able to go side by side. I loved that. That was great. And then it's lease document negotiation time, and then you go into the legal world, "the legal black hole", and then re-emerge, victorious with a signed contract.

### Want to learn more?

Schedule a Demo today to learn how AnthemIQ can make CRE transactions easier for you and your team.

[Get a Free Demo](#)