≢ **Simple Strat**

IMPROVED LEASE ACCURACY AND RENEWAL AUTOMATION —

From Manual to Automated: Lease Renewal Management

The Challenge

For one nationwide co-working space, managing lease dates effectively was causing issues across the business when it came to efficiency and renewal timelines. They faced:

- Manual date calculations for leases starting mid-month, leading to errors and wasted time.
- Difficulty automating renewal workflows due to inconsistent lease dates, impacting client communication and retention.
- Limited visibility into renewal timelines, creating bottlenecks in proactive outreach to clients.

The Solution

We designed an automated date normalization system using HubSpot and Zapier. This standardized lease start and end dates, ensuring prorated leases align with the first and last days of the month. By calculating accurate renewal dates and automating lease updates, the client could seamlessly manage several lease types and lengths, providing additional flexibility across the business.

The Impact

- Greater operational efficiency. By automating end-date calculations, the team cut their time in half to manage each record
- Increased accuracy in lease records, reducing errors and manual corrections.
- Timely communication and seamless stage updates for renewals 90 days out, thanks to automated renewal workflows.
- Improved customer retention and satisfaction for co-working tenants due to automated notifications of upcoming renewals.

The Details

Industry:
Real Estate

Business Area:
Lease Management

Tools Used:

- HubSpot Workflows
- Zapier Formatter

Start Date
📅 04/01/2025

Term (Months)
6

Term (days)
0

Office(s)
#217

Offered Price
$1,496.25

Notice-By
2 months prior to contract end date

Total Contract Value (BC)
$8,977.50

Pro-Rate
$0.00

End Date
📅 09/30/2025