

CONSULTING & MANAGED SERVICES

Expert hands on HousingVista

HousingVista is a platform you can run yourself, but you don't have to do it alone. We help you adopt and get more from HousingVista, and we deliver done-for-you outcomes powered by it: implementation, migration, training, integrations, and managed operations.



GROUNDED IN THE PRODUCT

ROLE-BASED ACCESS & OVERSIGHT

ADOPT-IT OR DONE-FOR-YOU

01 Services across the HousingVista lifecycle

HousingVista is a modern real estate platform connecting buyers, renters, owners, and agents: search homes, list properties, and manage real estate end to end. The services wrap around it.

Every service is grounded in a real product capability. Engage one, or combine several into a program. The same loop applies whether it's a one-week setup or a multi-office rollout: scoped, reviewable, and measurable at every step.



TRACK 01

Adopt HousingVista

Consulting, setup, migration, training, and support so your brokerage, team, or portfolio gets the full value of the platform, faster, and with oversight from day one.

Real Estate Platform Consulting · Implementation & Setup · Migration & Onboarding · Training & Enablement · Team & Brokerage Enablement · Support & SLA

TRACK 02

Powered by HousingVista

Done-for-you outcomes we deliver using the product (managed listings and pipelines, integrations, and operations) so you can focus on closing deals.

Managed Operations · Integrations & Data Services

02 · TRACK ONE

Adopt HousingVista

Consulting, setup, migration, training, and support so your brokerage, team, or portfolio gets the full value of the platform, faster, and with oversight from day one.

WE SET IT UP WITH YOU

Offices, listings, roles, and workflows

Our specialists work alongside your team to configure HousingVista exactly to how you operate: listing templates, viewing and offer workflows, and role-based access across buyers, agents, owners, and investors, so your people are productive from the first week.

2.1 Real Estate Platform Consulting

2.2 Implementation & Setup

2.3 Migration & Onboarding

2.4 Training & Enablement

2.5 Team & Brokerage Enablement

2.6 Support & SLA

02 Adopt HousingVista: plan it and stand it up

2.1 · CONSULTING

Real Estate Platform Consulting

We help brokerages, property managers, and developers map their listing, sales, rental, and management workflows onto HousingVista, and agree what a successful rollout looks like before any work starts.

- Discovery of current tooling, portals, spreadsheets, and manual processes
- Target operating model across buyers, agents, owners, and investors
- Listing taxonomy, pricing strategy, and role/permission design
- Rollout roadmap with milestones, owners, and success criteria
- ROI and change-management plan for your teams

2.2 · SETUP

Implementation & Setup

We stand up HousingVista for your organization (offices, teams, listing templates, and role-based access) so your agents and operators are productive from the first week.

- Organization, office, and team workspace configuration
- Listing templates, media standards, and map/location setup
- Role-based access (buyer, agent, owner, investor, admin) design
- Pipeline stages, viewing-slot, and offer-workflow configuration
- Go-live checklist and hypercare support window

2.3 · MIGRATION

Migration & Onboarding

Moving off a legacy portal, a CRM, or a pile of spreadsheets? We migrate your listings, contacts, pipelines, and documents into HousingVista with minimal disruption.

- Inventory of existing listings, leads, deals, leases, and documents
- Data mapping and cleansing into HousingVista records
- Bulk listing and media import with map placement validation
- Parallel-run validation against your old system before cutover
- Cutover plan, rollback path, and team handover

02 Adopt HousingVista: enable teams and support them

2.4 · ENABLEMENT

Training & Enablement

We get your people genuinely productive, not just logged in. Role-based sessions and golden-path playbooks so a new agent or operator is working deals in hours, not weeks.

- Hands-on workshops for agents, owners, operators, and admins
- Golden-path playbooks for listing, viewing, offer, and lease flows
- Train-the-trainer enablement so your team scales onboarding itself
- Onboarding checklists, quick-reference guides, and recorded sessions
- Adoption check-ins as the rollout progresses

2.5 · BROKERAGES

Team & Brokerage Enablement

We help multi-agent brokerages and property-management firms operationalize HousingVista across offices, with consistent processes, oversight, and reporting that hold up as you grow.

- Multi-office and multi-team structure and ownership design
- Consistent listing-quality and deal-stage standards across offices
- Manager dashboards, oversight, and review cadences
- Lead-routing and handoff conventions between agents and owners
- Performance review framework grounded in platform analytics

2.6 · SUPPORT

Support & SLA

Ongoing support with response targets your operation can rely on: a named point of contact, clear escalation paths, and proactive guidance as the platform and your needs evolve.

- Tiered support plans with defined response and resolution targets
- Named account contact and structured escalation path
- Release and roadmap briefings focused on the workflows your teams use
- Periodic health checks and optimisation recommendations
- Priority routing for production-impacting issues

03 · TRACK TWO

Powered by HousingVista

Done-for-you outcomes we deliver using the product (managed listings and pipelines, integrations, and operations) so you can focus on closing deals.

OR HAND US THE OPERATIONS

Managed listings and pipeline

When you would rather focus on closing deals, we run the platform for you. We keep listings clean and current, viewings and offers moving, and leases and maintenance on track, with quality and activity reporting back to your team.

3.1 Managed Operations**3.2 Integrations & Data Services**

03 Powered by HousingVista

3.1 · OPERATIONS

Managed Operations

Prefer to focus on closing deals? We operate the platform for you, keeping listings clean and current, viewings and offers moving, and the operational backbone humming.

- Listing publishing, media QA, and freshness/de-duplication upkeep
- Viewing-slot, enquiry, and offer-pipeline administration
- Lease, document, and renewal-date hygiene
- Rent-status and maintenance-request triage and follow-through
- Usage, quality, and activity reporting back to your team

3.2 · INTEGRATIONS

Integrations & Data Services

We connect HousingVista to the rest of your stack (portals, CRMs, accounting, e-sign, and identity) so data flows cleanly instead of being re-keyed across tools.

- Listing syndication and inbound lead capture from external portals
- CRM, accounting, and e-sign integrations via the platform API
- Identity / single sign-on and role provisioning
- Scheduled import/export jobs and reporting feeds
- Webhook and event wiring for downstream automation



04 How we engage

A clear path from intent to impact. The same loop whether it's a one-week setup or a multi-office rollout: scoped, reviewable, and measurable at every step.

01

Discover

We map your offices, teams, listings, and goals, and agree what "done" looks like before any work starts.

02

Plan

A scoped, reviewable plan: workspace structure, roles, workflows, migration scope, and rollout sequence.

03

Implement

We configure HousingVista, migrate your data, wire integrations, and validate everything against your old system.

04

Operate

We hand over with training and playbooks, or stay on to run operations, with reporting from the first day.

ENGAGEMENT MODEL

Adopt it with our help, or have us deliver it for you. Engage one service, or combine several into a program.

PRICING

Contact us. Tell us about your offices, listings, and goals and we will recommend the right mix.

05 We leave your team able to run it without us

Every engagement ships playbooks, golden-path templates, and hands-on enablement. Whether you keep us on to run operations or take the keys yourself, your people understand the platform, not just the dashboard.

- Role-based workshops for agents, owners, operators, and admins
- Train-the-trainer enablement so your team scales onboarding itself
- Onboarding checklists, playbooks, and recorded sessions



HOW TO START

Let's scope what you need

Tell us about your offices, listings, and goals. We'll recommend the right mix of consulting, implementation, operations, and enablement, and a plan to get there.

TALK TO OUR TEAM

housingvista.com/contact

GET STARTED FREE

app.housingvista.com

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SERVICES

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