

Customer profile

The German single family office manages a family foundation. The private foundation under civil law with legal capacity invests in real estate.

The challenge

Monthly tenancy schedules and financial plans were stored in numerous, widely varying files from several property management companies. There were too many files, too many data errors, too many gaps, and too many damaged cell formulas. Consolidated and historical evaluations were difficult.

Solution

LeanRE is hosted in the Microsoft cloud and imports all tenancy schedules and financial plans on a monthly basis. This involves a thorough check and, if necessary, correction of the data.

Results

LeanRE generates accurate Excel reports with trustworthy data and verified cell formulas. Decision-makers are immediately productive because Excel is a familiar tool. The system delivers print-ready analyses, reports, and fact sheets. Customers can expand LeanRE themselves.

«LeanRE provides the Executive Board with a clear basis for decision-making.»

Project lead, lawyer, and real estate manager

The single family office can leverage the **familiar advantages of Microsoft Excel**: usability, productivity, reliability, flexibility.

LeanRE unleashes the power of the world's most widely used software for analysis, visualization, and reporting. The huge global Excel community offers solutions, tips, and tricks for almost any question.

LeanRE integrates the customer's proven Excel files with their thousands of complex formulas. Long-term **investment and maturity are preserved**. Time-consuming, expensive, and error-prone redevelopment is not necessary.

LeanRE eliminates the disadvantages of Excel and...

- ... delivers **verified data quality** from Microsoft SQL Server, the proven database from the world's largest software manufacturer.
- ... consolidates data **directly and securely** within the database, not with error-prone, slow VLookup formulas.
- ... offers **verified, reliable cell formulas** which can no longer be accidentally overwritten and damaged.
- ... controls and tracks **who receives which information** and who is allowed to change data.

LeanRE **remains available** even in the face of geopolitical and legal challenges: LeanRE can be run either in the Microsoft Cloud, on hosted servers, on the internal company network, or, in cases requiring particularly high confidentiality, on an isolated PC.

Key figures

Initial project: 10 months
Commissioning: 2025
Users: 5

Improvements

Quality control of the data

Flexible, powerful evaluations in Excel

Consolidated analyses of sub-portfolios

Reuse of long-standing, proven Excel files with cell formulas

About LeanRE and LeanMIS

LeanRE is an Excel-based BI solution for real estate. LeanRE imports data from many data sources (SQL, ERP, CRM, files, cloud), manages reports, and ensures their accuracy. Users can create individual ad hoc reports with Excel and customize the system themselves.

LeanMIS is an Austrian software company based in Vienna.

Contact

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Software and Services

Hosting in Microsoft Azure Cloud:
Remote Desktop
Microsoft Excel
Microsoft SQL Server

LeanMIS Reference

Fact sheets can be freely designed in Excel.

LeanRE fills the Excel templates with verified data and can generate print-ready PDFs.

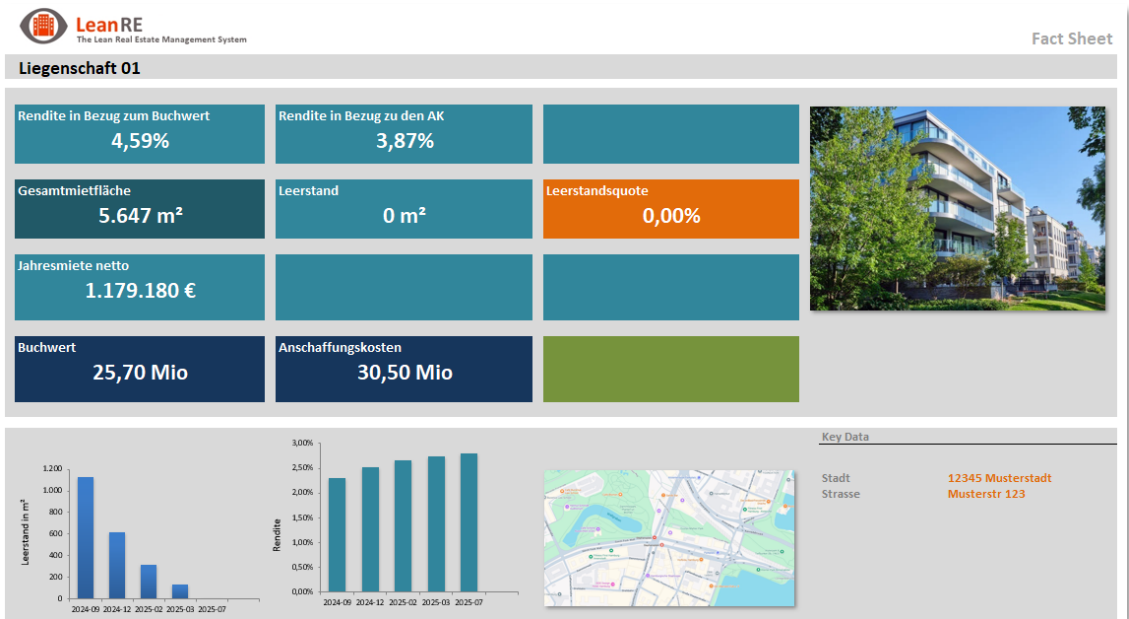
LeanRE provides consolidated analyses of real estate portfolios.

Users can zoom into detail data, e.g. individual payment items.

What-if analysis:
Users can run through scenarios with different inflation rates, interest rates, and maintenance costs.

Complex calculations can be transparently tracked using Excel formula auditing (the blue arrows in the image).

Cell comments provide clarity where necessary.



Konsolidiertes Immobilienportfolio: Büros in NRW				
Liegenschaft	Soll Jährlich Miete	Soll Jährlich MWSt	Soll Jährlich NK VZ	NK VZ %
01	1.879.180 €	357.044 €	281.877 €	15%
02	307.785 €	58.479 €	61.557 €	20%
03	753.751 €	143.213 €	188.438 €	25%
04	362.870 €	68.945 €	108.861 €	30%
05	947.571 €	180.039 €	142.136 €	15%
06	1.677.788 €	318.780 €	335.558 €	20%
07	375.394 €	71.325 €	93.849 €	25%
08	524.372 €	99.631 €	157.312 €	30%
09	1.225.280 €	232.803 €	183.792 €	15%
10	532.159 €	101.110 €	106.432 €	20%
11	128.784 €	24.469 €	32.196 €	25%
12	400.463 €	76.088 €	120.139 €	30%
13	1.678.971 €	319.004 €	251.846 €	15%
14	214.441 €	40.744 €	42.888 €	20%
15	1.923.653 €	0 €	480.913 €	25%
16	772.000 €	146.680 €	231.600 €	30%
17	1.052.613 €	199.996 €	157.892 €	15%
18	947.705 €	180.064 €	189.541 €	20%
19	1.549.649 €	0 €	387.412 €	25%
Gesamt	17.254.428 €	2.618.414 €	3.554.237 €	

