Proposal for Enhancing Investment Engagement and Market Analysis Capabilities

Coulton Creek Capital

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Company Background

Coulton Creek Capital (CCC) leads the way in spotting and seizing real estate investment prospects with cutting-edge analytics and market acumen. Our commitment to innovation and investor contentment propels us to embrace the newest trends in data analysis and communication tactics.

Project Description

CCC aims to embark on a thorough initiative to enrich our interaction with investors and to delve deeper into the possibilities of the real estate markets nationwide. This endeavor comprises three main elements:

1. **Synchronization and Coordination of Contact Methods:** Implement advanced strategies to optimize our use of MailChimp for deal announcements, maintain an accurate and up-to-date contact database, and expand our outreach capabilities.

2. **Registered Investment Advisor (RIA) Database Creation and Outreach:** Develop a detailed database of RIAs from SEC.gov data, categorized by Assets Under Management (AUM), to facilitate targeted outreach and introductory meetings.

3. **Market Research Analysis:** Perform an in-depth analysis of US real estate markets to identify and quantify investment opportunities for CCC, using government data sources and data analytics.

Specific Tasks

Investor Contact Method Synchronization

- Technical Skills: Data processing, database management.

- Process and update the MailChimp database to ensure the validity of all contact information.

- Integrate contacts from the Investor Management System (IMS) and CCC's LinkedIn followers into MailChimp.

RIA Database and Outreach

- Technical Skills: Data compilation, outreach coordination.

- Compile an RIA list from SEC.gov, categorizing by AUM segments: $< 500M$,500M-5B, and >5B.

- Establish an outreach process (mail, email, and other methods) to introduce CCC and schedule introductory meetings.

Real Estate Market Research

- Technical Skills: Proficiency in Python/R, data analysis, machine learning, and data visualization.

- Domain Knowledge: Understanding of real estate market dynamics, financial analysis, and legal considerations.

- Data Requirements: Access to property data, market data, and external sources like property listings and demographic information.

- Implementation Steps: Data collection, feature engineering, model selection, training and evaluation, deployment, and maintenance.

- Model Selection: Choose appropriate machine learning algorithms such as regression, classification, or clustering.

- Monitoring and Maintenance: Continuously monitor performance, update with new data, and refine algorithms for improved accuracy.

Desired Skill Set

- Experience with digital marketing tools, especially MailChimp.

- Skills in data analysis, manipulation, and API's, particularly with Python or R.

- Understanding of SEC.gov data and real estate market analysis.

- Ability to work with large datasets and conduct market research.

Preferred Team Size

We are seeking a team of 3-5 motivated students who can bring a mix of marketing, data analysis, and research skills to the project.

Advantages for Students

- Opportunity for a creative problem solving experience in a real world business environment.

- Potential for future paid freelance engagements in software development.

- Contribution to the creation of a product to significantly improve the engagement with new prospect and increasing customer service and satisfaction.

Work Location and Future Opportunities

This project is designed for remote collaboration. There may be an opportunity for one or more internship opportunities following project completion.

NDA and Intellectual Property

Participants may be required to sign an NDA. Intellectual property generated will belong to CCC, with students credited for their contributions.

Conclusion

This project presents an opportunity to apply and expand skills in data analysis, market research, and digital marketing within the dynamic context of real estate investment. We look forward to working with talented students to enhance CCC's investor engagement and market analysis capabilities.