

CASE STUDY

Scaling Boutique Service through Modernization

Westcoast Management & Realty, Inc.'s Journey with Vantaca

OVERVIEW

When Westcoast Management & Realty, Inc., a boutique community management firm based in Tampa, Florida, sought to modernize their operations, they weren't just looking for new software—they were searching for a true operational partner. They needed a platform that could provide visibility, automate manual work, and allow them to maintain their signature high-touch service while scaling responsibly.



Vantaca delivered.

BUILDING A SCALABLE, HIGH-TOUCH OPERATION

At the heart of Westcoast's strategy is delivering personalized service at scale. "We pride ourselves on being a smaller, family-owned and operated company with a corporate structure that allows us to standardize processes efficiently while retaining the flexibility to provide boutique service for non-standardized items," shared Tim Wainwright, Training Supervisor.

20% ↑
Growth in 18 months

Within just 18 months of implementing Vantaca, Westcoast's portfolio grew by 20%—without the need to significantly increase staff. "We've grown significantly without having to over hire," Tim explained. "Vantaca lets us scale without compromise—bigger, better, and still boutique."

STREAMLINING FINANCIAL PROCESSES FOR BETTER INSIGHT

The transition from their previous software to Vantaca radically improved their financial operations. Daniel Helbig, Staff Accountant and Finance Team Lead, emphasized the shift: "Before, we had to reconcile every single transaction manually. Now, Vantaca's auto-reconciliation saves hours per month, allowing us to have a higher-level understanding of association health instead of being bogged down in tedious manual work."

This freed the finance team to focus on strategic financial health and management, rather than chasing individual transaction errors.

MODERNIZING PAYMENTS WITH VANTACA PAY

Payment processing saw one of the most significant transformations. In just over 18 months with Vantaca Pay, Westcoast processed over \$1.7 million in electronic payments, cutting down reliance on physical checks and offering greater convenience to homeowners. "We can easily see what homeowners are doing in their payment portal," Daniel noted, "which has significantly streamlined our support processes."

In addition to operational efficiency, the company has seen a noticeable increase in revenue from e-check and credit card transaction fees, adding a new, steady revenue stream that supports future growth.

EMPOWERING TEAMS THROUGH AUTOMATION

Beyond payments and finance, Vantaca's automation tools have redefined how the management team operates day-to-day. Managers are now able to "set it and forget it," as Tim described. Vantaca's workflows and automated tasks enable the team to efficiently manage increasingly complex portfolios without proportionally expanding headcount.

"Vantaca is more than a tool—it's the only platform that supports our growth and keeps us true to our values."

MORE THAN SOFTWARE: A CONNECTED COMMUNITY

Westcoast's success with Vantaca wasn't limited to tools and workflows—it was amplified by the people in the industry also using the platform. Tim pointed to the Vantaca Community platform as a major differentiator: "An open and collaborative environment where people genuinely want to help."

He reflected on the rare sense of support he found: "I've asked questions and had people from massive companies answer them for me. That just doesn't happen in other places." The ability to learn, collaborate, and connect across the broader Vantaca ecosystem continues to be a major asset.

RESULTS THAT SPEAK FOR THEMSELVES

Today, Westcoast Management & Realty proudly serves 167 associations, with Vantaca as the foundation of their growth. By modernizing workflows, simplifying financial management, and strengthening team collaboration, Westcoast has scaled responsibly while protecting the personalized service that sets them apart.

As Tim put it best: "Vantaca is the only platform we need—it's the backbone of our growth and the heart of our service."

