

2022

INTELLIGENT SOLUTIONS FOR
WORKFLOW AUTOMATION



Case Study

CLIENT USE CASE

Property Managers

CASE STUDY

THE CLIENT'S STORY

Sophie looked at her diary for the week. It was a sea of reminders to chase people. The calendar looked reminiscent of the Tetris game with pieces of her week broken down into little blocks stacked one on top of another. Red meant a quote was due. Blue was an invoice. Yellow, a job report.

Sophie prided herself on being organised and had used a number of different means of categorisation and 'calendarisation' to stay on top of her to do list but it seemed that almost her entire week was dedicated to making sure she got the quotes, invoices, job reports that she needed.

Sophie's cast her mind back to her last meeting with one of her larger clients - an investment and development manager from the Midlands. The meeting had not gone well.

For her returns-focused clients, the cost of a property manager was magnified by their exit multiple (the yield at which they sold the asset). Whilst there was nothing Sophie could do about this simple transaction mechanic, she would love to be able to add value. Indeed, Sophie would love to work on the investment side one day and demonstrating her ability to understand and deliver to their objectives would help her cause. Not just with this client but with others as well.

The real estate industry was seemingly in a state of flux. Widely perceived as being resistant to technological change for many years, it seemed as though companies were looking to make up for lost time.

THE CLIENT'S STORY

Trying to compress years or decades of adoption into a single performance review.

Sophie knew that she could not reduce the costs of the service she delivered to any one client. Indeed, her own bosses were constantly pushing for the property managers to be able to increase their revenues.

Although Sophie was well aware that her clients viewed her fees as an almost unnecessary expense, she also recognised that none of them were considering bringing this function in-house.

It was just too time-consuming and usually considered a distraction by investment firms accustomed to operating lean. There was a scale issue to property management that would increase an investment firm's cost basis - more time managing people, less time managing money and projects.

Dealing with everything from rent collection to lease renewals to project works to maintenance left little time in Sophie's day. She had a good relationship with her clients (usually) but often felt she was on the back foot. Putting together reports for them every month ate up a good chunk of her time as well. What's more, once she had pasted her screen shots and Excel graphs into the document that she sent, they were then cast in stone.

Often a question would come up during the subsequent meeting that meant slicing the data a different way. This was why Sophie was always on the defensive. Moreover, all the information that Sophie had was on a customer by customer basis. She could not compare performance across different customers to get benchmarks. Even better would be the ability to get insights based on asset type or age of the building.

THE CLIENT'S STORY

Sophie was sure that this was the sort of data that would deliver value to her clients. This was how she could use the cap rate multiple to her advantage.

If Sophie could show that her clients had higher maintenance costs or lower utilisation rates for certain assets than comparables, they could focus on these areas. If the net yields could be driven up by even 0.1% this would mean a price impact of 1 - 2%. That was a multiple of what they were receiving in terms of management fees.

Even if Sophie only got a portion of this, it would change her relationship with clients. It might even allow her to strike out on her own. At the moment, property managers were pushing fees for some of these systems onto their clients. If that continued to be the case she could join her colleagues that had launched their own property management companies. There was always the chance that her clients took these systems in house but either way, the current situation could not continue.

All of her thoughts came back to the same core point. That how they were doing their work today was not sustainable. It took too many 'person hours' per unit of revenue. The business itself was not going away, and real estate was a 'trillion dollar asset class' so there must be an opportunity to develop a better solution.

Sophie looked over toward her manager's desk and then at the next item on her to do list. Something would have to give. It was either higher fees or more clients.

Sophie needed to come up with a way in which to do more with less.

THE CLEVERLY SOLUTION

The Cleverly platform provides a single solution for space management. With modules covering all aspects of workplace operations, from environment monitoring to resource booking; scheduled and reactive maintenance; compliance and finance. Cleverly also provides occupiers/tenants as well as third party suppliers with access to a portal that allows them to report issues, provides them notifications and issues jobs ... from catering to flowers.

Cleverly can bring complex operations into a single source of truth. Below is a list of the modules and functionality to be used by Sophie in delivering for her clients:

WORKFLOW AUTOMATION

At the core of Sophie's time pressures is the need to manually take action, for example sending an email or setting a reminder. Even worse, this often means triangulating across more than one system.

A client might report an issue within their 'tenant interface' which might then mean that Sophie has to generate a purchase order to send to a supplier. The supplier responds via email and Sophie has to set herself a reminder in her calendar to chase up on this issue. This is before one even considers that some clients call, text or send WhatsApp messages,

Cleverly allows Sophie to nominate events and then assign actions to them. For example if a tenant reports an issue via Cleverly's occupier portal then Sophie can elect to receive a text, email or notification. Sophie could also choose to immediately generate a work order and use the routing rules to send it to the correct supplier.

PROPERTY MANAGERS

This is all done automatically. Sophie can even customise the messages that are sent or customise the rules based on the property, tenant or customer.

Automation also allows Sophie to set up events within the system and either create notifications or tasks associated with them occurring. For example, if a supplier has not attended to a job for which they were scheduled or they have an upcoming quote due, Sophie can set up auto-generating emails to remind them of their responsibilities.

Sophie then uses her dashboard to 'manage by exception'. Sending reminders does not elicit '100% behaviour' from her suppliers or customers but it does at least allow her to only intervene when necessary.

THRESHOLDS

Various clients have different spend thresholds when it comes to approving the costs of works. To complicate things further, the supplier may not be aware of them (or the differences between them) and Sophie's company has its own requirements for signing off on job values or quotes.

Cleverly allows thresholds to be incorporated into customer or locations profiles and form part of works orders that are issued. Additionally, using the automation above you can send a notification to a supplier to remind them of the threshold if a job is approaching a limit.

System rules and user profiles can be configured to ensure that Sophie's colleagues can only approve values up to a certain level. For example, it may require a manager to approve any quotes over £1,000 whereas an admin user can accept quotes below this amount.

DATA & ANALYTICS

Within data is contained information. From information, you can draw insight. For Cleverly, our Data & Analytics module is designed to allow clients to draw insight from their workplace management or property maintenance activities.

For Sophie, these data relate to questions such as how much is being spent at different properties; the highest cost asset items; anomalies by service line; what occupancy rates for assets and more. Of greatest importance is linking these data to broader benchmarks to indicate where savings can be made. Using Cleverly's export capabilities Sophie can provide her clients with the ability to do this themselves or can facilitate comparison with the Cleverly system itself.

The data module of Cleverly can be configured to your requirements. Whether this is tracking downtime costs, looking at trend analysis or creating budgets, it allows office managers, facilities managers and decision makers to move from instinct to insight.

CONTRACTOR MANAGEMENT

Sophie uses a network of external suppliers to keep her clients' assets maintained. These include cleaning companies, M&E contractors, painters & decorators, front of house staff and more. Often these services were not tendered and no data was kept as to whether her clients were getting good value for money in terms of product or performance by suppliers. Whilst this was changing, Sophie wanted to be able to keep quotes within the system and monitor ongoing performance.

Whether you need to track specific metrics (for bonus payments or the satisfaction of contractual requirements), or just want to ensure that your engineers (or supply chain) are performing at the required level, Cleverly makes this easy.

CONTRACTOR MANAGEMENT (CONTD)

Along with the Data & Analytics module, Contractor Management can be configured clients to provide them with the information they require across a number of different variables.

Examples of the contractor management metrics are as follows:

- First time fix rate
- Average spend by service line, supplier, cost category etc.
- Time to site attendance
- Average job duration
- Percentage of jobs open/closed
- SLA breaches
- Compliance works completed

By having this information available, Sophie can address issues before her customers request action and inform their discussions in regular meetings.

When considering a change of supplier or tendering service delivery for some of his larger line item costs, Sophie can provide accurate, detailed information as to what the Company needs from suppliers and attach SLAs/KPIs accordingly.

REACTIVE MAINTENANCE

Ensuring that productivity remains high and the workplace provides the appropriate platform will require ongoing maintenance, both reactive and planned. The Cleverly platform handles reactive maintenance with ease, whether this be in-house engineers or an external supply chain.

You can create any sort of reactive task, whether this be ordering food or flowers; or dealing with leaks and air conditioning issues. All service lines are editable to fit your needs, the system allows you to deal with different priority levels (P1 - P5 as standard) with rates to customers and suppliers able to be tailored to suit.

REACTIVE MAINTENANCE (CONTD)

Jobs can be sent to engineers on a 'first come, first served' basis or routed to specified engineers based on rules you create.

If you use Helpdesk operatives, the tasks component of the reactive maintenance module allows them to get reminders and notifications of any outstanding requirements. Pre-specified reminders and notifications include:

- Suppliers needing to be assigned
- Late arrivals
- SLA breaches
- Quotes returned
- Comments from suppliers or customers
- Job reports unsent

The system also utilises triage solutions, meaning that custom questions can be added to particular jobs or job types. This allows information to be gathered to increase first fix rates, as well as minimising call out costs if there are issues that can be fixed by the client on-site with sufficient knowledge.

SCHEDULED MAINTENANCE

Any well run workplace will also utilise planned maintenance to keep all assets operating and reduce costs over their lifecycle.

Cleverly allows multiple contracts to be in place on a single site, with each contract in turn operating across a number of service lines. The system can also accommodate multiple locations as appropriate.

The Cleverly scheduled maintenance module allows for:

SCHEDULED MAINTENANCE (CONTD)

The Cleverly scheduled maintenance module allows for:

- Standardised job templates (e.g. along SFG guidelines)
- Deadline dates to be rolling (based on prior attendance)
- Attendance times to be confirmed via automated reminders to suppliers and clients
- Summary reports for PPM visits
- Linking PPM attendances with compliance requirements
- Automated invoicing based on contract setup
- Centralised storage of all PPM documents

CUSTOMER & SUPPLIER COMMUNICATIONS

Critical to Sophie's success in streamlining her responsibilities and ensuring she could 'do more with less' was the ability to centralise communications with customers and suppliers. Success would depend on the system integrating with her customers' and suppliers' existing communications methods and making it easy to send/receive information. Whilst Sophie felt she should be able to impose ways of working on suppliers, she was not sure that service would not suffer as a result.

First and foremost, Sophie wanted to ensure that emails could be sent to (and saved) within the system. Sophie also wanted the ability to integrate with WhatsApp because this seemed to be increasingly used by both customers and suppliers.

Most other systems on the market, even at multiples of the cost of Cleverly usually miss this functionality: the ability to centralise and organise communications between clients and suppliers.

In addition to external communications, internal notes can be added, and questions directed to other employees for input. Further, with Slack and SMS integrations you can even add in messages from other channels if they are used by your team or suppliers.

PROPERTY MANAGERS

FINANCE

Sophie primarily uses the export function to provide her clients with the necessary financial information.

With its Sage integration, Cleverly can integrate directly with either your, or your clients', accounting systems. If an alternative solution is needed, Cleverly can likely map its exports to your existing systems' configuration ensuring that you get the necessary information in the right place.

MULTI-PARTY ACCESS

At the core of Cleverly is the consolidation of information. However different user types require different information, or a different lens through which to view these data.

The Cleverly system provides admin, customer, occupier/tenant, and supplier views of the same information.

With the Cleverly system, Sophie can facilitate tenants' reporting of issues and ensuring that they receive notifications if there is a change in status on a job in which they are involved or a comment or question that requires their input.

Suppliers can access all their quotes, work orders, invoices and performance data on the system. Not only does this standardise the comparison across suppliers, it also incentivises them to improve their performance metrics.

All the information can also be access via mobile device with the Cleverly app available in both the App Store and Play Store.



THANKS FOR READING ABOUT
HOW CLEVERLY HELPS ITS CLIENTS
IMPROVE THEIR OPERATIONS.

IF YOU WOULD LIKE TO DISCUSS
HOW CLEVERLY CAN BRING OUR
SMART SOLUTIONS TO YOUR
BUSINESS, GET IN TOUCH WITH US

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