

# Hunt Military Communities:

## Change of Occupancy Maintenance Solution

Discovery Readout

# Agenda

- 1 Project Objectives
- 2 Discovery Overview
- 3 Solution Architecture
- 4 Delivery Methodology & Implementation Roadmap
- 5 Next Steps

# Project Objectives

Hunt Military Communities is currently looking to implement a new Change of Occupancy Maintenance (“COM”) Solution on the Salesforce Platform which will act as the system of record for managing all the workflows associated with the COM process, Inspection process and PO process.



## Technical Design

Provide a detailed technical design that identifies source systems and data required to deliver on overall project objectives.



## Accurate, timely SLA's

Track and report on SLAs to measure performance and implement hard controls to ensure data integrity



## Yardi Integration

Near real-time integration with Yardi to eliminate siloed data & ensure SLA's are met



## Future State

The solution will also consider the leasing process during technical design to build a scalable and flexible architecture.

# Discovery Overview

# Discovery Overview

## Accomplishments

5

Weeks

11

Total Discovery Workshops  
+1 for Leasing Workshop #2

3

Integration Workshops

120+

Business Requirements  
(User Stories)

## Workshops Conducted

1. COM Process: Military Housing
2. COM Process: Wrap-up Military Housing and Conventional Housing
3. Mobile App
4. Integration (High Level Discussion)
5. Inspection Process
6. PO Process
7. Integration - Yardi
8. Integration - VCM
9. Preventative Maintenance Process & Notifications
10. Reports and Dashboards & Security Model
11. Leasing Process Overview
  - a. Leasing #2 Scheduled for October 10th

## Teams We've Worked with

- Business Solutions
- IT
- Maintenance
- Leasing
- Operations
- Executive Team

# What we Heard (themes)

*Areas the solution is designed to address*

*“Simplicity of the solution is key to success. Salesforce is supposed to be a game changer for our techs (current adoption rate of Survey123 is 50%).”*

*“Techs are not technology savvy.”*

*“The Yardi Integration is an important part of the COM Process”*

*“ADD QUOTE HERE”*

*“ADD QUOTE HERE”*



## Efficiency & Scalability

Goal is a long term, digital transformation to support business objectives and transform resident and employee experience



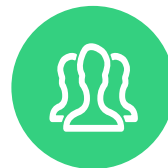
## Process Visibility & Data Integrity

Being able to understand the current workload without manual tracking and implement hard controls to ensure data integrity.



## Streamline & Automate Processes

Providing an opportunity to evaluate and streamline processes, but ensure ease of use for the techs..



## Improved Tracking and Reporting on SLAs

Ability to manage the COM Process more efficiently and ensure we are meeting or exceeding SLAs

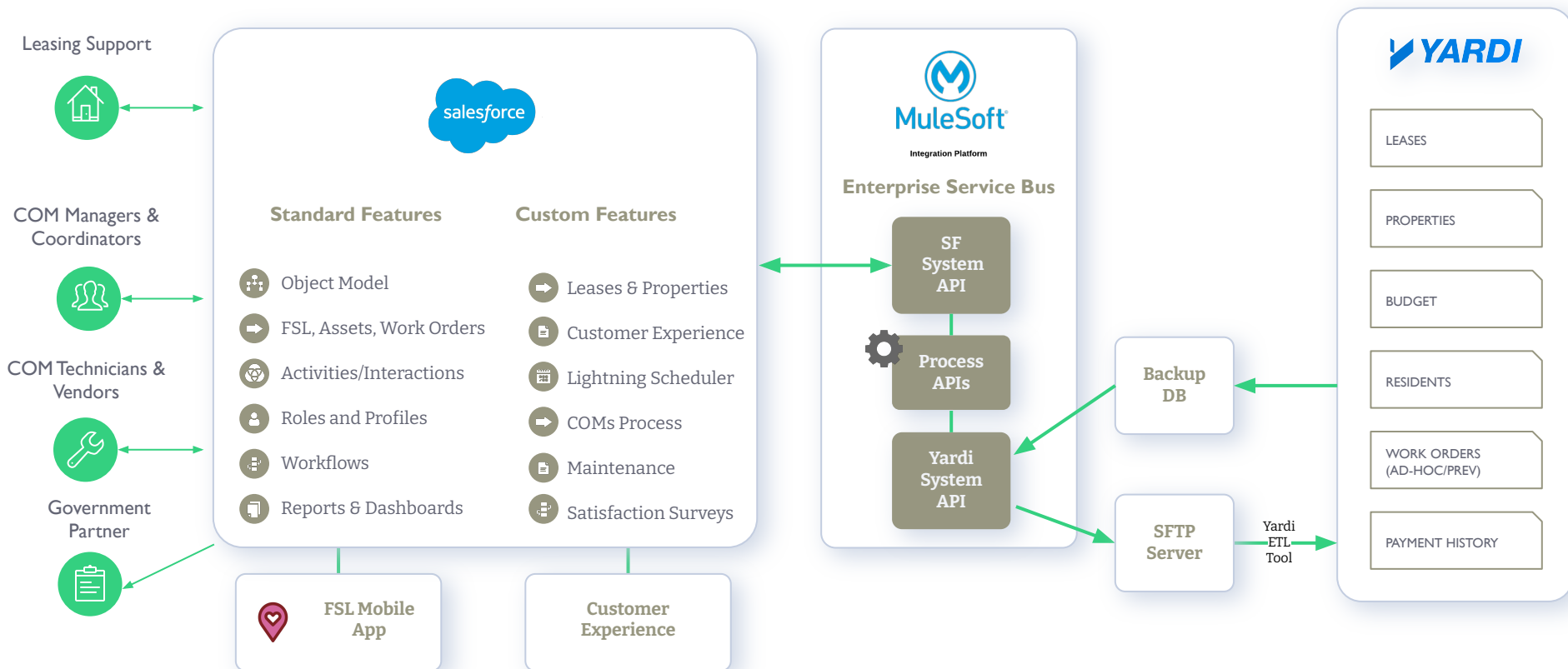
**fortimize**



# Solution Architecture



# High Level Architecture



# Data Integration

## Salesforce Data Model

5+

Objects with data

3

Objects synced between Mulesoft and Salesforce

TBD

Number of fields mapped from Yardi to Salesforce

TBD

Number of fields mapped from VCM to Salesforce

## Assumptions

- Integration schema will be finalized as a collaborative effort between Fortimize and the Hunt Military Communities team.
- Fortimize will be responsible for providing advisory on data mapping, best practices, and integration requirements.
- Fortimize team will be responsible for performing data integration needed as part of this engagement. Mulesoft will handle the transformation before loading to Salesforce.
- Hunt Military Communities will be responsible for the Yardi ETL Tool, as it pertains to the integration with Yardi.

## Methodology

### Integration Platform

*Centralized integration architecture*  
allowing application to application communication



### Type of Integration



*Batch data-based integration* occurring nightly

Vendor  
Contract  
Management

*Batch data-based integration* occurring nightly

# High Level ERD

# Capabilities for Implementation

## PROJECT SCOPE FOR BUILD PHASE PER SCOPING DOCUMENT

- Discovery
- Core Salesforce Functionality
- Inventory (Property & Units) Management
- Lease Contract (Tenant) Data Management
- Field Service Lightning Configuration
- COMS Process
  - COMS: Pre-Move Out Inspection Workflow
  - COMS: Move Out Inspection Workflow
  - COMS Tasks/Work Orders
    - COMS: Duct Cleaning (optional)
    - COMS: Flooring Cleaning or Replacement
    - COMS: Paint/ Maintenance Workflow, include cleaning, pest control, cleaning, and landscaping.
  - COMS: Final QA Walkthrough Workflow
  - COMS: Leasing Buyback
  - Military Only: Government Inspection Workflow
  - COMS: Process Finalization Workflow
- PO Process
- Integration of Leases (Tenants) from Yardi to Salesforce
- Integration of Inventory Data (Properties & Units) from Yardi
- Data Migration
- Reports & Dashboards
- UAT and Training
- Hypercare

## KEY ASSUMPTIONS

- Integration
  - Schema will be finalized by Fortimize during the discovery phase.
  - Systems in scope: Yardi & Vendor Contract Management (VCM)
  - Initial data migration from Yardi to be performed by running the integrations for relevant data.
- Salesforce FSL mobile app
  - If determined during discovery that customization of FSL mobile app will not support Hunt's requirements, Fortimize will work with Hunt to recommend possible solutions.

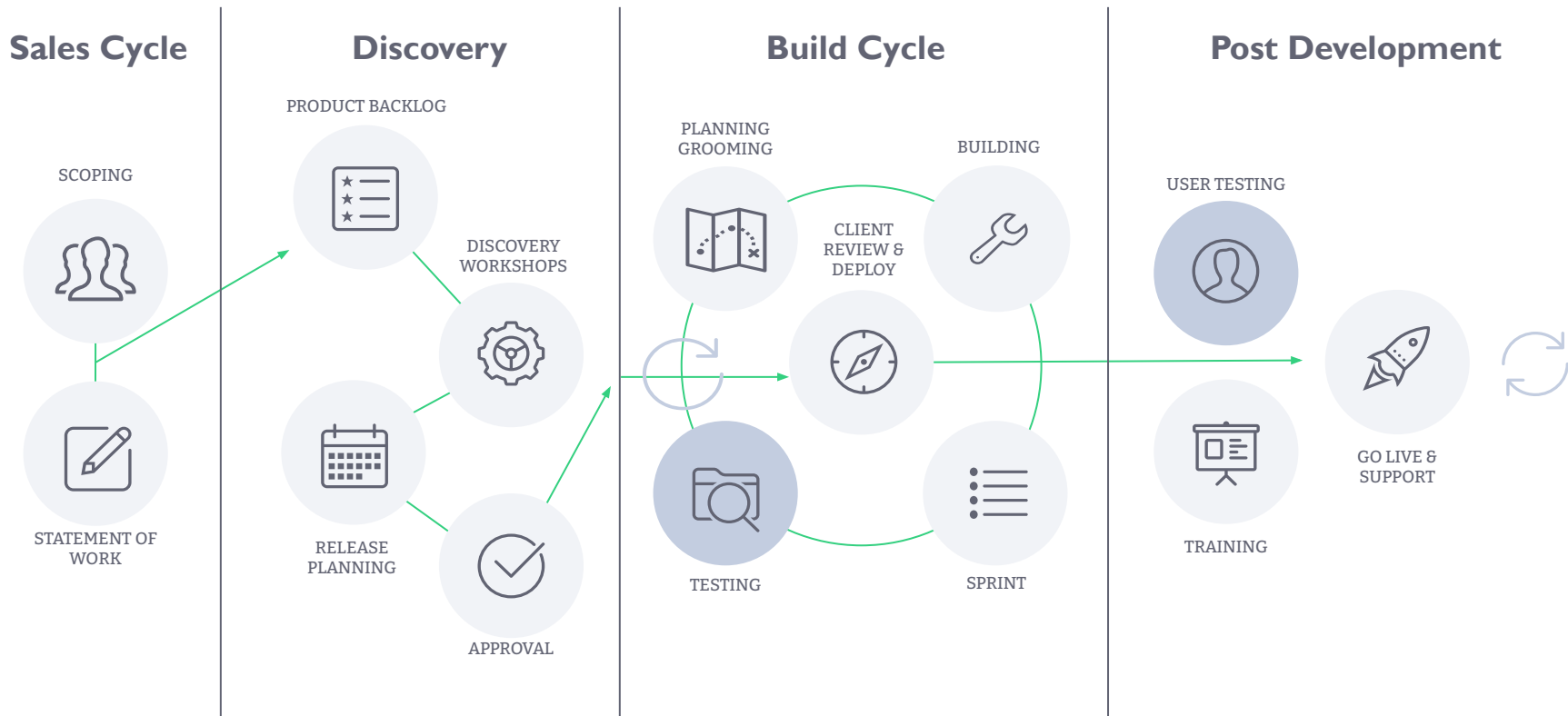
## POTENTIAL FUTURE PHASES

- Leasing Life Cycle
- Ad-Hoc Work Order Maintenance Process
- Resident Portal
- Salesforce Surveys for Resident Surveys

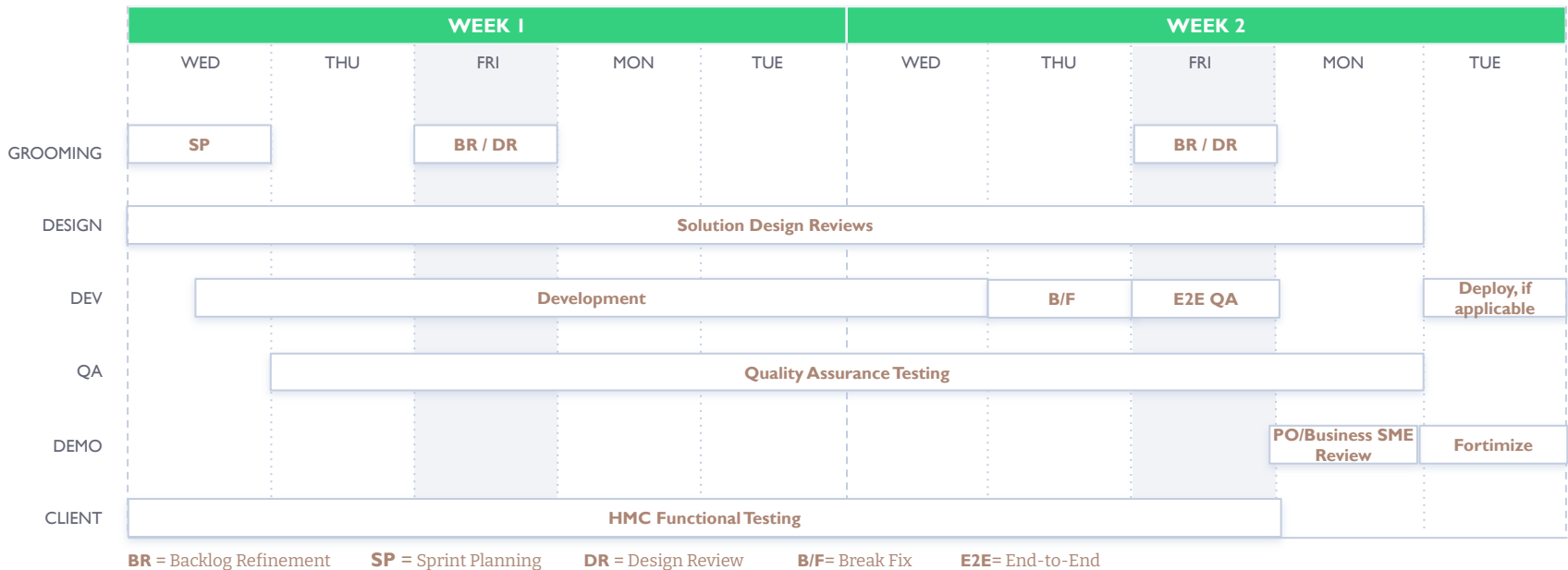
\*indicates changes from original scope

# Delivery Methodology & Implementation Roadmap

# Fortimize Methodology



# Typical 2 Week Sprint Cycle



## Description for usage:

- The Product Owner & Business SMEs on the client side is highly involved in testing throughout the sprint. (1st week of Sprint 3 and Sprint 5)
- Design and requirements gathering tasks are assigned during sprint planning and part of sprint capacity.

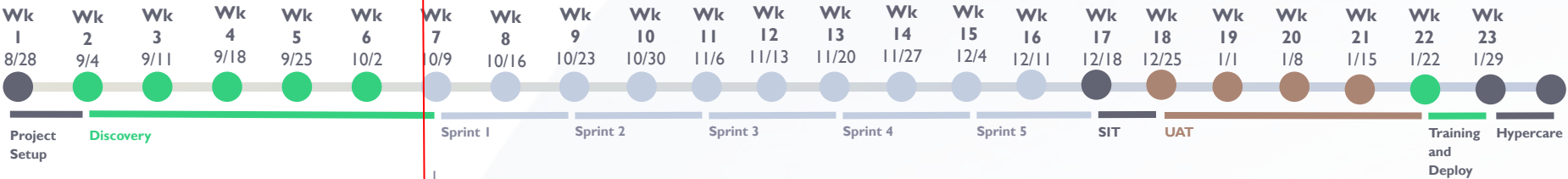
# Proposed Timeline *(Phase 1 - 23 weeks)*

## Discovery

- Project Kickoff
- Discovery Workshops
- Solution Architecture & Design
- Discovery Readout

## Post-Build

- System Integration Testing (SIT)
- End-to-End User Acceptance Testing (UAT)
- Training
- Deployment



We are here

## Build

- Salesforce & Integration Build
- Quality Assurance Testing
- Demos (At conclusion of each Sprint)

## Hypercare

- Fortimize to provide assistance with high-priority fixes & support



# Next Steps

# Next Steps

- Action Items
  -
- Build Phase to begin on October 12th
- Upcoming Meetings:
  - Daily Stand-up (Internal to Fortimize Team)
  - Sprint Planning (Starts bi-weekly October 12th)
  - Weekly Status (continues weekly on October 13th)
  - Weekly Backlog Refinement (Starts weekly October 14th)
  - Sprint Demo - Every two weeks starting (Starts bi-weekly October 25th)

fortimize



# Q & A

# Appendix