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Grainger plc

Voids Process Discovery

January 2023



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{Background



Our previous review identified opportunities to simplify and automate your current complex operating procedures

It recommended a simple approach – starting with Void Management (this review) – based on the following phases:

1 optimised & standardised

Optimise complex business processes and then apply them consistently across the business to deliver significant benefits

2 automated

Automate the enhanced processes to drive further efficiency and repeatability

3 link to data for insight

Align this work with the data improvement work to further improve business efficiency and effectiveness and deliver insight

This paper presents the findings of the 'void to let' process review, as part of phase 1 above

click to Navigate!

Discovery Methodology

The methodology taken during discovery and during the interview process, including objectives of findings.

Methodology	Process	Objectives	Deliverables – Review Findings
<ul style="list-style-type: none"> Conducted 2-hour interviews across 9 business areas Understand each business area and the role played within the Voids Process Walk through of the process, discussing individual challenges and pain points Discussed the systems used, documentation produced and transferred Collected challenges to high level themes and prioritised between business areas Explored the root causes of challenges to recommend an opportunity summary for improvements 	<ul style="list-style-type: none"> Identify variation and understand where could be standardised Identify areas of inefficiency around roles and responsibilities Identify data gaps/ quality issues and how they can be alleviated including GDR, controls and compliance 	<ul style="list-style-type: none"> Identify the touchpoints of different systems and where these could be aligned, integrated or utilised better/ removed Understand areas of the process that could be automated to increase efficiency and reduce voids time/costs 	<ul style="list-style-type: none"> Process discovery PowerPoint Background Executive summary High-level briefing Detailed findings Next steps PDX Assessment & Guidance
			Presentation <ul style="list-style-type: none"> Process discovery document Process mode Process function Process per property type Process per location Process Metrics User Assessment Opportunity Grid Opportunity Assessment
			Written document <ul style="list-style-type: none"> Process discovery document Process mode Process function Process per property type Process per location Process Metrics User Assessment Opportunity Grid Opportunity Assessment

Executive Summary

Current process

complex
inconsistent
unclear

Many different processes are followed across functions, property types and locations, with limited performance metrics or tracking

Significant manual intervention required with multiple documents and work-arounds

This makes the task of reducing voids very challenging as we have no way of measuring current performance or tracking improvements

Future process

standardised

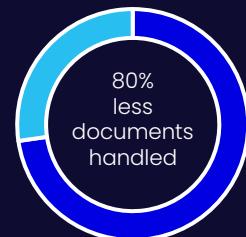
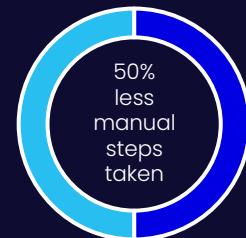
simplified
(end-to-end)

transparent
(for insight)

In order to optimise Voids, we recommend a collaborative redesign of the process which focuses on the below 3 design principles:

1. standardisation of how the process is completed, regardless of the property type or business area
2. structuring inputs and creating rules-based logic that can be automated
3. ensuring the process information is accessible, accurate and visible end to end, across the business

There is potential to reduce the manual steps taken in the process by ~50% and manual documents created/handled by ~80% at ~2-3 minutes per document



next steps

design “one”
process

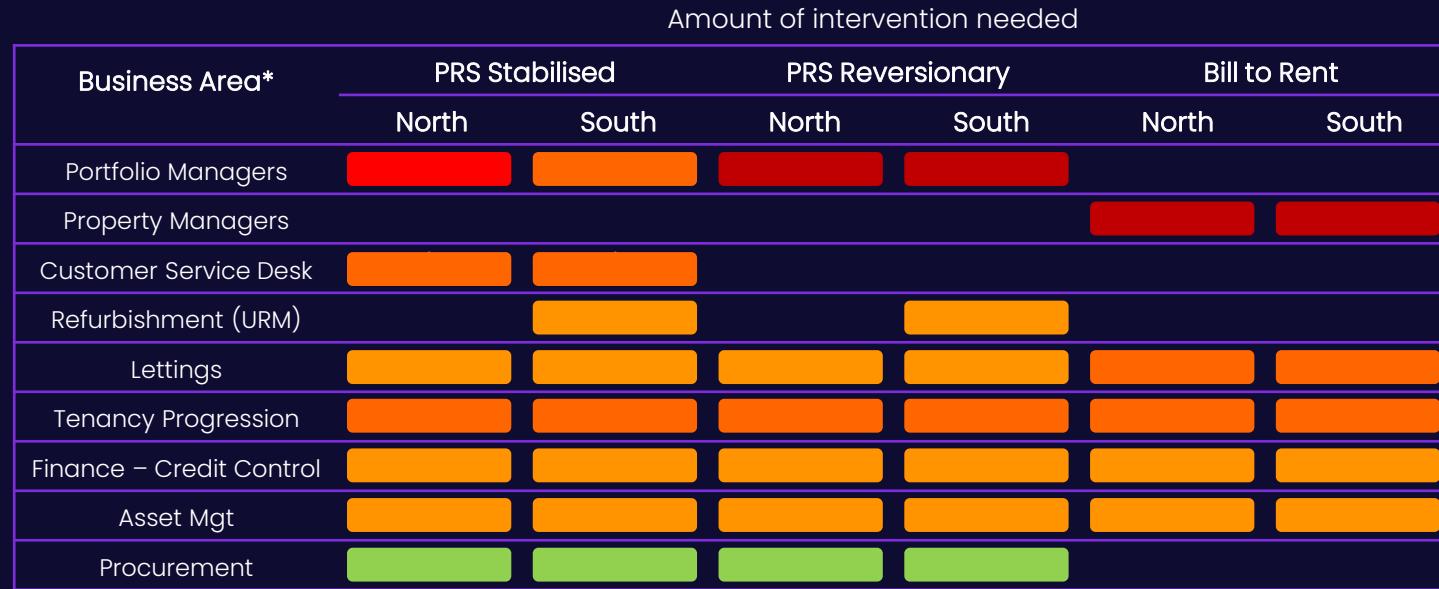
measure
performance

apply best fit
technologies

right size, RACI &
train

{High-level briefing}

The current process is highly inefficient and inconsistent – requiring huge amounts of manual intervention and offering little opportunity to monitor like-for-life performance



*External parties were not interviewed including Marketing, Inventory, referencing and refurbishment contractors however, Unit Refurbishment Managers were included in discovery, due to their more secondment like partnership with Grainger plc

It became clear that there is **no single process followed across functions, property types or locations leading to many off-system workarounds**

Click to Navigate!

Process Metrics (1 of 3) :

Number of steps taken per function during the MIMO process, per property type and location (north versus South).

Business Area*	PRS Stabilised		PRS Reversionary		Bill to Rent	
	North	South	North	South	North	South
Portfolio Managers	56	43	84	71	x	x
Property Managers	x	x	x	x	87	74
Customer Service Desk	30	30	x	x	x	x
Refurbishment	x	20	x	20	x	x
Lettings	19	20	19	20	23	23
Tenancy Progression	23	23	23	23	23	23
Finance – Credit Control	7	9	7	9	7	7
Asset Mgt	17	13	17	13	14	14
Procurement	1	1	1	1	x	x
Total	153	159	151	157	154	141
Total (External)**					137	

* External contact work not included - Marketing, Inventory, settings, referencing
** Does not include Unit Refurbishment Management tasks provided by TFM

{High-level briefing}

Value Stream per MIMO (~)

- 6 *internal* functions involved from future vacant to move in
 - 35 emails are sent
 - 25 handover points
- 35 - 45 documents created/handled (BTR-PRS)
- 5-10 different documents from north to south (BTR-PRS)
- North complete 10% more steps than the South (*non-contracted*)
 - Perceptions of employee to property differences between locations
- 5+ Tracking sheets maintained
 - Up to 8 x double keying of information between systems

Root Cause

- Process**
- Complex processes with different ways of working
 - Too many handover points
- Data**
- Required information is often not available within systems
 - No visibility of the end-to-end process
 - No single version of the truth
 - No true picture of the voids cost or performance
- People**
- Different resourcing between north and south
 - Lack of accountability
- Technology**
- System limitations
 - Lack of integration/ automation

Opportunity

In order to optimise Voids, we recommend a collaborative redesign of the process which focuses on the below 3 design principles:

1. **standardisation** of how the process is completed, regardless of the property type or business area
2. **structuring inputs** and creating **rules-based logic** that can be automated
 - *Includes tactical RPA opportunities to improve data challenges*
3. ensuring the process is **accessible, accurate and visible** end to end, across the business

{ High-level briefing

In order to optimise the Voids process, we recommend standardisation of how the process is completed, regardless of the property type or business area:

optimised & standardised

automated

transparent

1

Standard pricing play book – Extend property price playbook to the South, updated and shared at selected intervals throughout year

Why?

Standardise between north and south, shared with teams via Salesforce – Replace the manual steps taken during asset approval
Reduce the need for approvals and email exchanges

2

Standard Specification:

- Standardise the specification for BTR & PRS with tick boxes/ standardised pricing
- Localised partnerships with one contractor per area – organise schedule for rates and agree with contractor, system can then auto select based on location and create works order
- Price per property (PPP), Schedule of rates (SOR) then falls out of PPP

Why?

Standardise between PRS and BTR, North and South
Eliminate the need to:

- Gather and process multiple quotes
- Create workarounds in Proactis for those who do not meet requirements, maintaining data transfer with contractors within MRI, as is done with refresh works
- Reduce the need for property managers to create technical specifications leading to issues during the refurbishment and creating delays

 Reduce the steps taken by ~60% during the refurbishment/ approval process
Increase relationships with contractors to bring day 0 work starts to 100% (currently at 40%)

{ High-level briefing

In order to optimise the Voids process, we recommend structuring inputs and logic, automating tasks wherever possible:

optimised & standardised

automated

transparent

1

Digitise and structure the notice to quit received by tenants, mirroring the inputs needed in MRI to be able to automatically kick start the process

Why?

Removes the manual steps of double keying/ requesting information from the NTQ. Auto creates the MIMO task and associated tasks for move out (resell process excluded)

2

Approval layers and workflows accessed within the system, with notifications for actions required

Why?

Centralises communications to the system and forces proper procedure re approvals.
Removes retrospective approvals

3

Use RPA to upload historic unit intelligence and automate rules-based tasks

Why?

Make unit information accessible and remove the need for off system comms/documentation such as key location and previous refurbishment dates

4

Create logic-based rules to reduce the need for clarification and guidance on refurbishment/ sell/ refresh

Why?

Rules based on length of time since previous works and properties proactively marked to sell to:
Reduce time taken to market property
Reduce manual steps/ handover points

{ High-level briefing

In order to optimise the Voids process, we recommend structuring inputs and logic, automating tasks wherever possible:

optimised & standardised

automated

transparent

5

Utilise customer facing technology to automate deposit returns/ compliance documentation required on move in

Why?

Centralises communications/updates & reduces emails
Improves customer experience
Reduce documentation creation/ handling

6

Automate any data input/ collection to third party systems and portals such as tenancy deposit, utilities, council tax, inventory hive

Why?

Reduce number of manual steps
Reduce handover points between systems and the time taken to navigate/ transfer information
Reduces delays/ downstream information gaps & frustration

{ High-level briefing

In order to optimise the Voids process, we recommend ensuring the process is accessible, accurate and visible end to end, across the business:

optimised & standardised

automated

transparent

1

Accurate process information – Ensure all required information and data points are held and accessible within the systems

Why?

Remove the need for off system comms/documentation such as key location and previous refurbishment dates

2

Simplify data input – ensure the same information is only CRUD (created, read, updated, deleted) in one place throughout the process

Why?

Remove double keying between systems/ documents and people
Reduce transactional data collection that is not useful

3

Create clear and measurable KPIs and implement accessible and dynamic dashboard style process tracking

Why?

Ability to measure the performance of each void
Improve accountability and people performance
All areas can track the end-to-end status, per MIMO, eliminating the need for off system trackers

4

Ensure field employees have access to the information they need, to be able to update in near real time

Why?

Reduce delays on information
Improve downstream process and turn around times
Reduce data gaps & increase accountability

{ High-level benefits

standardised

"one" process across property types, locations and functions:

- 100% voids starting on day 0 (60% increase)
- Eliminate 5-7 days waiting/chasing on contractors to return quotes
- Eliminate bespoke specifications for each refurbishment
- All works ordered and tracked via same system

**simplified
(end-to-end)**

Simplified and accurate processing:

- Structured, data inputs that feed directly to systems
- Automated processes to reduce manual interventions and human input between systems and third parties
- Digitised and centralised comms with customers
- 50% less manual intervention
- ~80% less handling/creating documents

**transparent
(for insight)**

Ability to gain insight on factors affecting:

- Void cost
- Effective lead management / viewings
- Turnaround time between tenancies
- Rental growth at the point of renewing a tenancy
- Retention rates

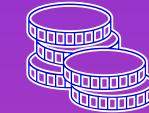
Reduction in lost rents for 60% of refurbishment turnarounds:



Documents created, handled and shared



Reduction in turnaround time between tenancies



All works to start on day 0

50% reduction in manual intervention:



Manual intervention



Increased employee satisfaction



Improved customer experience

The ability to track each void & factors end to end:



100% Trackers /Double keying removed



Emails & off system comms



Ability to measure & track performance

{ Next Steps

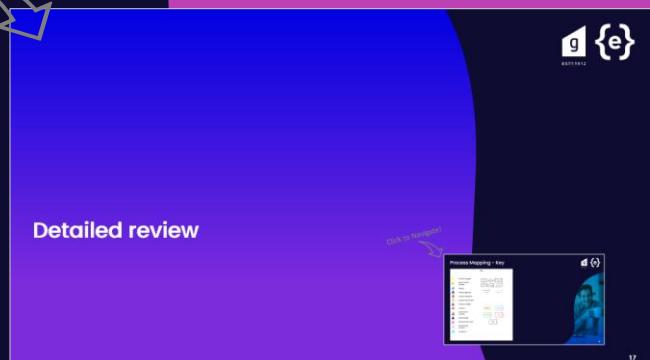


1. Collaboratively design one end to end “to-be” process that follows the same steps, documentation and logic regardless of property type, location or role completing the task:

Hold workshops with all business areas to make future process decisions and understand required exception handling

- Stick to the 3 design principles, ensuring exceptions to the “one” process are only for legal requirements, customer experience and business need and stick to it
- Use the detailed analysis conducted during discovery to understand current variance and steer standardisation
- Simplify manual tasks through creating structured, rules-based logic that can be automated within systems

Click to Navigate!



{ Next Steps



2. Ensure the status of each void is visible to all and performance can be measured:

- Ensure there is one version of the truth
- Clarity on how the performance (KPIs) of the process is tracked and ensure the data required is input and accessible

{ Next Steps



3. Overlay the standardised and simplified process with best fit technology – requires a technology deep dive to understand how technology is best utilised, accessible to those who need it and can easily be tracked from end to end
 - Deep dive into technologies, with a decision made on moving the entire process to one system or integrating systems to reduce double keying and ensure visibility of end-to-end void status between teams
 - Automation of any manual tasks that sit outside of Grainger systems e.g. third party portals
 - Digitise communications and information transfer with tenants through utilising applications (spike/ salesforce)
 - Eliminate manual tasks through RPA, such as double keying, document transfers and emails with customers
 - Ensure data can be input by employees out in the field

{ Next Steps

design "one" process

ensure performance can be measured

apply best fit technologies

4. right size, RACI & train

4. Right size teams, clarify roles and responsibilities with clear RACIs, handover points and trainings in place to ensure "one" process is adopted, and accountability taken
 - Alleviate and work with functions to alleviate perceptions of the process, collected during the interview process
 - Share "good news" of how the process is improving and ensure feedback loops are in place until fully adopted

Click to Navigate!



{ Wider Next Steps

There is discussion needed over next steps regarding your wider process landscape:

1. Repeating the optimisation methodology across your process framework

Which order?

- How do we prioritise processes for discovery for optimisation?
- Do we complete an end to end “to-be” process development and delivery before moving to the next?
- Do we complete optimisation discovery across whole landscape before redesign?
- Do we layer and complete in parallel?

2. Process Excellence Maturity

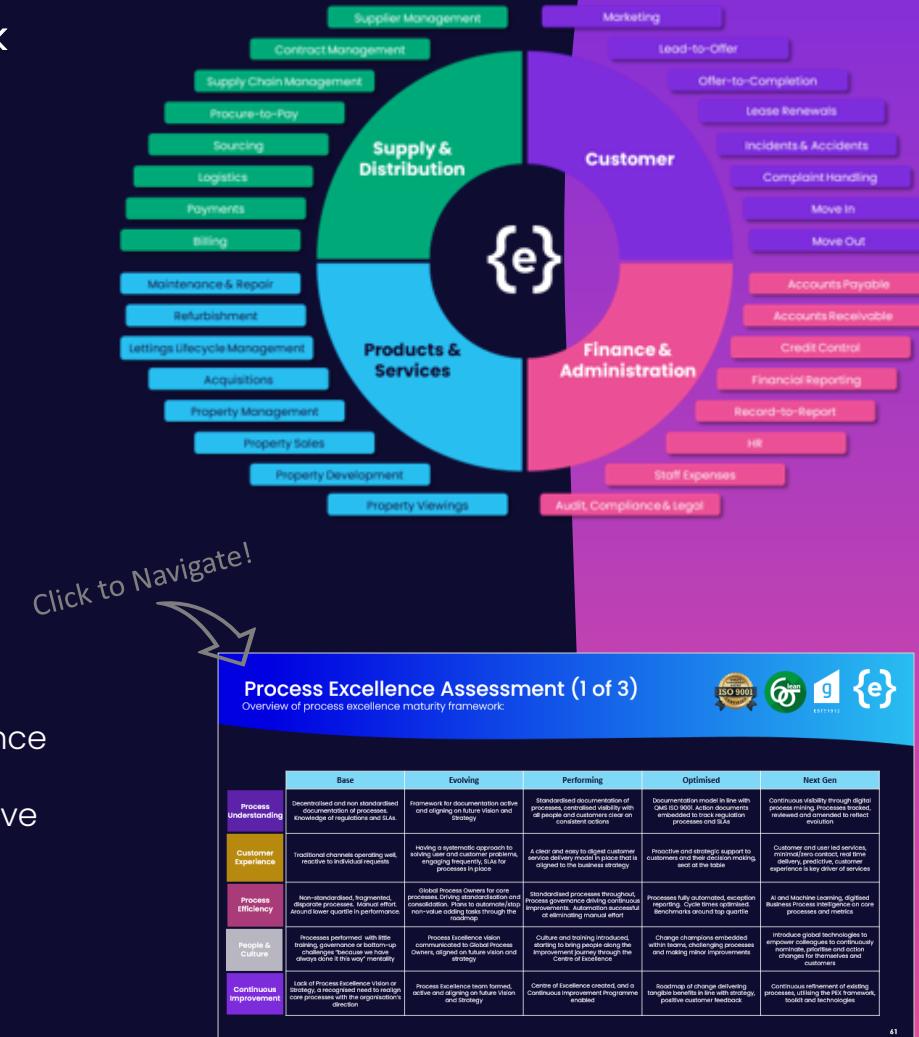
Where do you see your PEX maturity and when?

- We have completed a high-level assessment of your process excellence maturity and provided guidance on how this can be grown – apex, p60

3. Governance & Optimisation Delivery

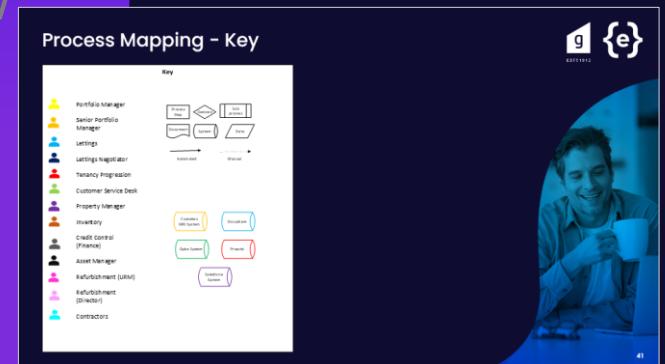
Self sufficient versus process partnership?

- Self sufficient – Training/ upskilling of internal colleagues to be able to perform assessments & deliver optimisation
- Digital Transformation partner – Creating a collaborative process centre of excellence (CoE), centralising and governing process documentation & optimisation
 - Bringing together areas of the business to identify, discuss, prioritise and approve optimisation
 - Automation partner to elevate efficiencies tactically & strategically
 - Measuring, tracking and continuously improving process performance



Detailed review

Click to Navigate!



Complex process with different ways of working

The following slides outline the different challenges and inefficiencies found within the process, highlighting the areas for improvement



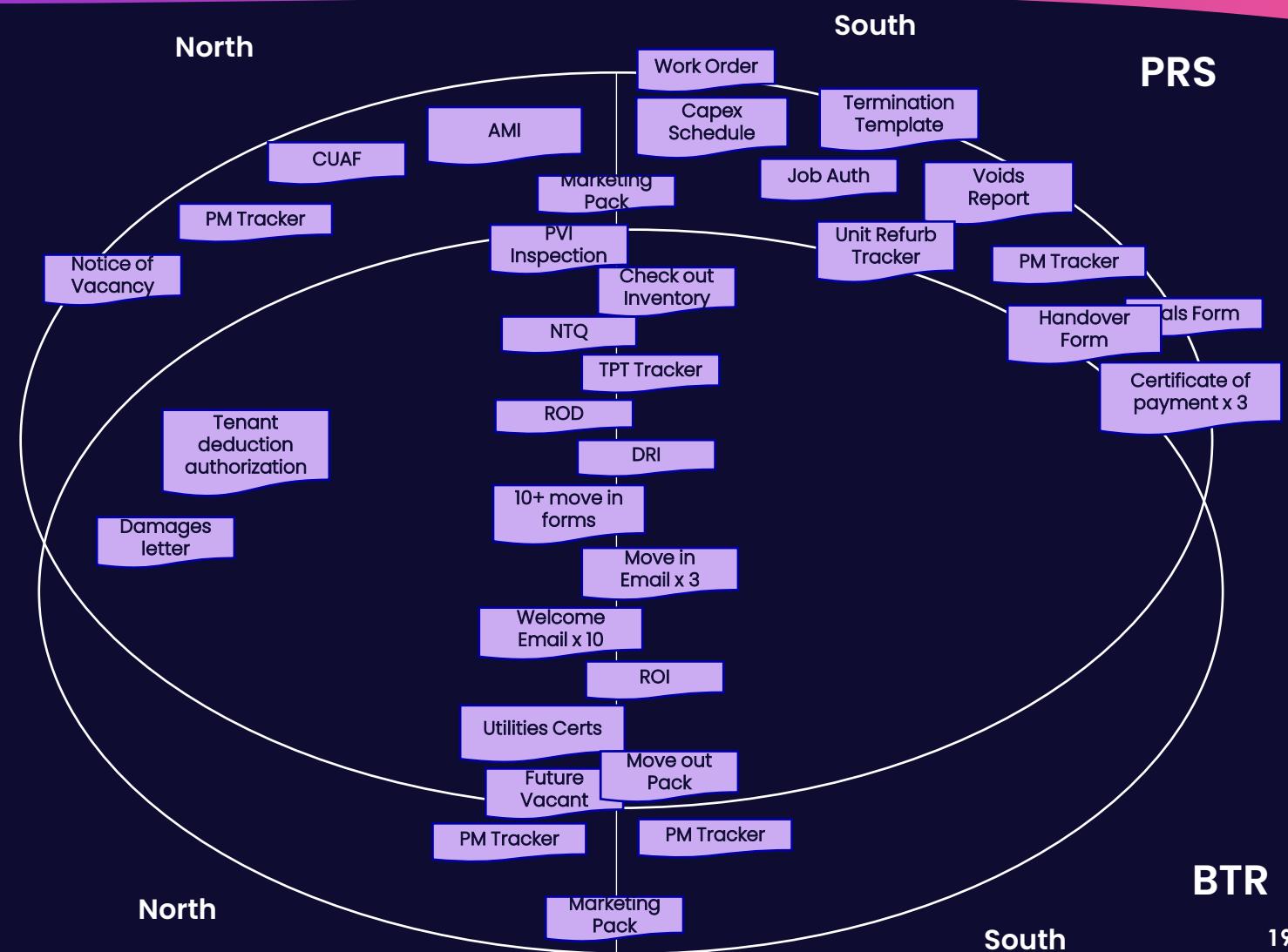
There are huge differences between the way BTR and PRS properties are processed:

- Differences in the way information is processed and different systems used between functions, leading to a lot of off system documentation and information transfer/ chasing
- PRS usually runs through a refurbishment process during the move out stage which involves more steps and time taken before a property can be marketed and relet
- Majority of PRS/general works appear to be conducted in the South and therefore a lot of work has been contracted out, whereas in the North steps are carried out internally
- PRS (stabilised) properties, future vacant to move out, is managed by the Service desk with multiple handover points between Portfolio Managers
- Some units have their lettings outsourced, leading to less steps processed internally but lack of control over process and customer experience
- Some locations use Kier as a contracting partner and in others there is no localised partnerships, resulting in no SLAs, multiple manual quotes/tenders retrieved and processed and bespoke pricing

Off System Working

There is an opportunity to minimise the documentation needed by creating an accessible and visible process across all functions and standardising and building logic rules that can be automated and transferred digitally

- 35+ Documents used across the process
- 18+ are double keyed/ uploaded into systems
- 5-10 differences between north and south
- 5+ trackers used due to not having access to information/systems
- 15+ used due to system limitations
- 10+ used due to no integration between systems
- 10+ used due to no digitised inputs (paper processing or unstructured inputs)



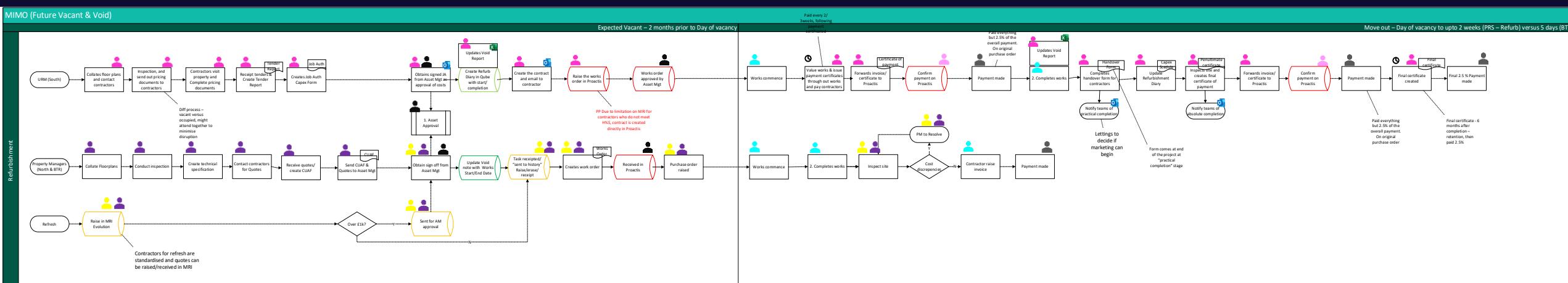
Refurbishment Variation (1 of 2)



There is an opportunity to simplify the refurbishment process for PRS, by aligning it to the BTR/refresh process through standardizing the contractor engagement process. The process can then be managed in an automated manner through a system

There are variances between refurbishment North to South (PRS) & BTR

- South uses external third party (TFT) who conduct all site inspections, inventory, management of contractors including tender and quotes and provide void reporting to PMs, asset management and lettings
 - North uses Property Managers to manage the above. This leads to different ways of working; communication style and documents produced and rework due to Property Managers not trained to provide technical specifications
 - The refresh contractor engagement through MRI is a lot less complex than the refurbishment, although the principles of contracting works are the same



Contractor Engagement Variation (2 of 2)



There is an opportunity to simplify the refurbishment process for PRS, by aligning it to the BTR/refresh process through standardizing the contractor engagement process. The process can then be managed in an automated manner through a system

There are large variances in the way contractors are engaged, between North and South/ PRS versus BTR

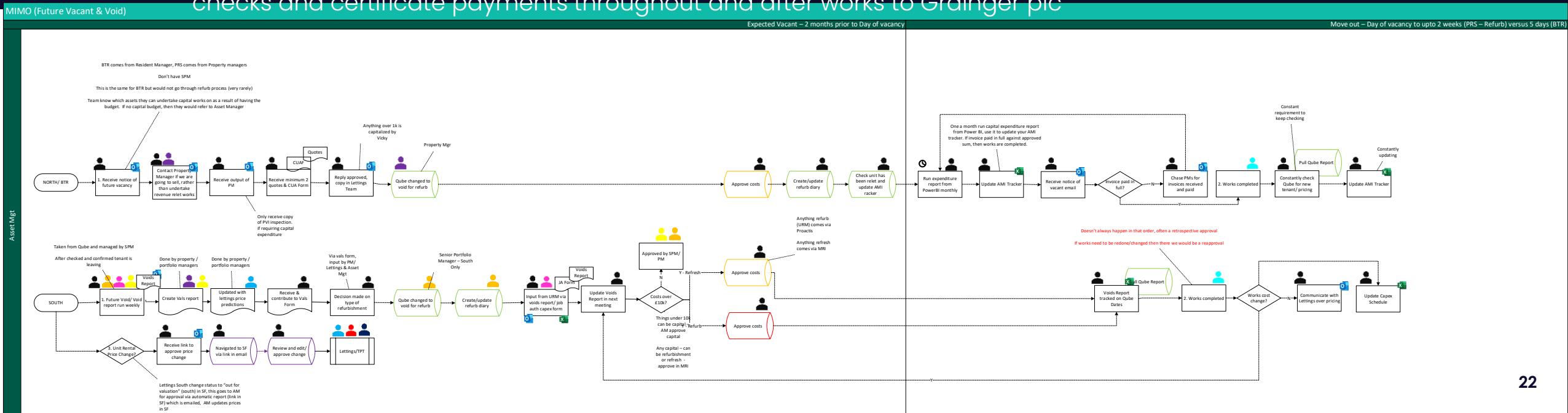
- All areas were trialed to use Kier however it appeared this model did not work nationwide:
 - Kier have pre agreed PPP (price per property) and anything further is invoiced separately (however this does sometimes lead to duplicate invoicing)
 - Kier will attend PVI and give technical specifications on work, with prices rarely changing once a tenant moves out and works commence
- For those using localised contractors, internal policy dictates 2/3 quotes are received for comparison
 - Many smaller companies refuse to deliver quotes due to continuously not winning tender
 - Employees are forced to process contractors in Proactis rather than MRI due to strict health and safety regulations excluding them from being contracted
 - No standardised specification sheet for PRS properties leading to bespoke quotes and work orders, no structured tick box form or standardised PPP
 - No SLAs with contractors leading to chasing for quotes, often across multiple teams
 - No set contractors per location so no way for system to auto select, relieving manual work

Asset Mgt Variation

There is an opportunity to standardise the process between north and south, using the same systems to approve costs and rental price changes. This relies on the recommended changes to contractor engagement and refurbishment works

There is variation between ways of working in Asset Management (cost approval) North to South:

- The South has a more formalised process than the North, with a formal tender and analysis process, whereas the North tends to rely on informal tenders and quotes.
- In the North, there is a formal tender and analysis process, with quotes being submitted by contractors, which are automatically categorised as such over £1k.
- BTR tends to follow the North's way of working, as it has a formal tender and analysis process, with quotes being automatically categorised as such over £1k.
- The South BTR tends to follow the North's way of working, as it has a formal tender and analysis process, with quotes being automatically categorised as such over £1k.
- Contractors are required to provide a risk assessment and method statement for each project, detailing their health and safety requirements. These are created in Proactis as a workaround, due to most contractors not meeting the health and safety requirements.
- The documentation requirement between North and South differs, with TFT providing a more thorough tender and analysis process, alongside checks and certificate payments throughout and after works to Grainger plc.

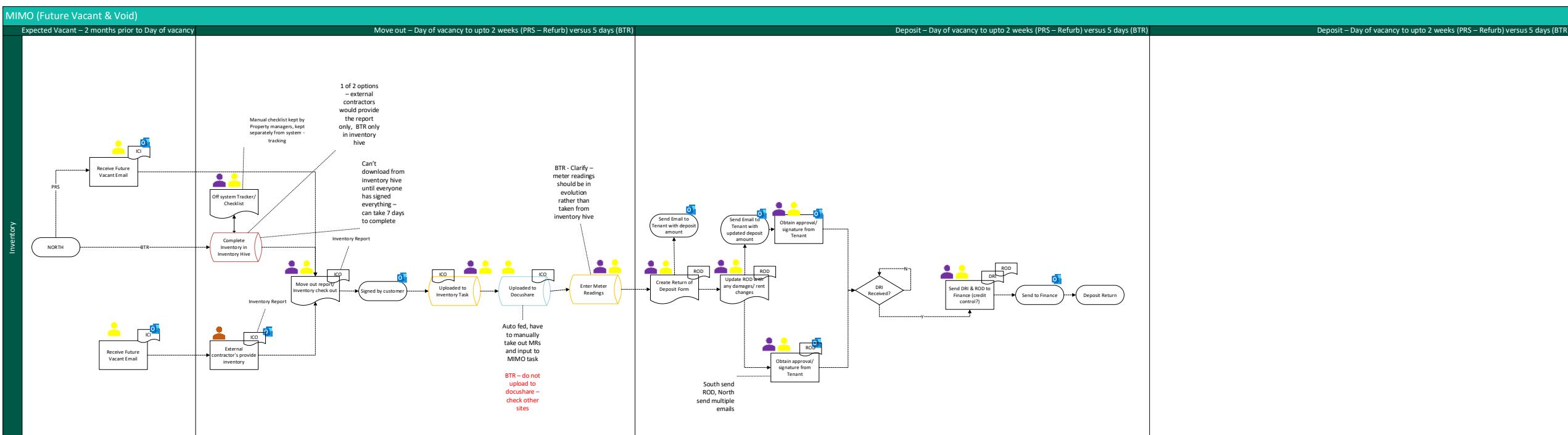


Inventory Variation

Due to external inventory in the South, it is difficult to deep dive and recommend an aligned process. For inventory processed internally, integration of data from inventory hive to internal systems, will reduce manual keying into internal systems and reduce data gaps on meter readings

There is variation between locations and PRS/BTR during the inventory phase:

- For PRS in the South, external contractors are used to provide inventory
- For BTR and in the North, the Property/Portfolio Managers will manage inventory, usually processed by an RSM/RSA
- For BTR a third-party system, Inventory Hive, is used to process transactional data and upload documentation



Functions and locations use different systems

There is an opportunity to simplify the technology used between different functions within across the process. Salesforce has capacity for voids processing and there are integration capabilities within MRI and Qube, however a deeper dive is required



Asset Management - Main decision maker on refurb/relet versus sell, approval of capital refurb costs

Involved in Expected Vacancy, Move Out

Work across PRS mainly, sometimes BTR (anything capital)



Refurbishment – Responsibility split between Property Manager and URM (third party to arrange refurbishment and manage contractors)

Involved in Expected Vacancy, Move Out

Work across PRS only



Property Manager– Act as main communication for tenant from move out to move in, conducts all inspections/ refurb and comms with contractors

Involved in Expected Vacancy, Move Out, Deposits, Move in

Work across BTR



Service Desk – Process PRS notice to quit through to deposits

Involved in Expected Vacancy, Move Out

Work across PRS (Stabilised) only



TPT – responsible for progressing tenants through to move in

Involved in Expected Vacancy, Move Out, Deposits, Move in

Work across BTR & PRS



Lettings - responsible for supporting on letting the property including marketing and pricing

Involved in Expected Vacancy, Move Out, Deposits, Move in

Work across BTR & PRS



Finance– Responsible for processing return of deposits, managing incoming direct debits and updating systems to reflect

Involved in Move Out, Deposits and Move in

Work across BTR & PRS



Procurement - Responsible for supporting on decisions on costing (contractors)

Involved in Expected Vacancy, Move Out

Work across BTR & PRS



Portfolio Mgr. – Act as lead across move out to move in, each assigned portfolios

Involved in Expected Vacancy, Move Out, Deposits, Move in

Work across PRS



15+ handover points during expected vacancy

By simplifying technology/ integrating data points, the end-to-end process will become available to all functions and should reduce the handover points required via email and consequent delays , reducing TAT



- Customer Services, Portfolio Managers or Property Managers will update stages of the tenant moving out through Evolution MRI, MIMO task, dependent on the property type
 - Portfolio managers hand over to the Customer Service desk, sending documents via email
 - Some data is also duplicated in Qube (key dates and notes on the Void/ Refurbishment)
 - There are multiple handover points between operational teams (PMs, Asset Mgt, Lettings) during this phase, majority via email notification with communication, rather than by system tracking
- Lettings & Asset Management receive notice/tracking of the tenant move out via automated emails, or voids reports pulled from Qube
 - Lettings communicate to TPT who will both begin to process the future vacancy via Salesforce, relying on automated emails and comms via Property Managers/ Asset Managers for updates
 - Information on the new tenant move in is periodically updated in MRI and Qube which can be viewed by the Property & Portfolio Managers
 - This is often where recruitment of a new tenant begins with early marketing on refresh/relets, reference checks and deposits taken with communication with external contractors. This is logged within Salesforce and first notice of a new tenant for the wider team, who do not use Salesforce, is setting up of a move in appt in MRI and Lettings due date in Qube Void Note.
- Delays in updating systems and sending through communications via email leads to a lot of to and fro/ chasing and duplications of work
- Rescinding notices and delays in refurbishment works are often difficult to track across numerous systems leading to off system communications, chasing and delayed updates to customers

Manual steps taken during expected vacancy

There is an opportunity to rearrange, digitise, structure and integrate the notice to quit into expected vacancy MIMO, reducing ~25 manual steps by automatically triggering MIMO tasks, currently manually selected by employees

The notice to quit from tenants is received via various forms and funneled into an unstructured email

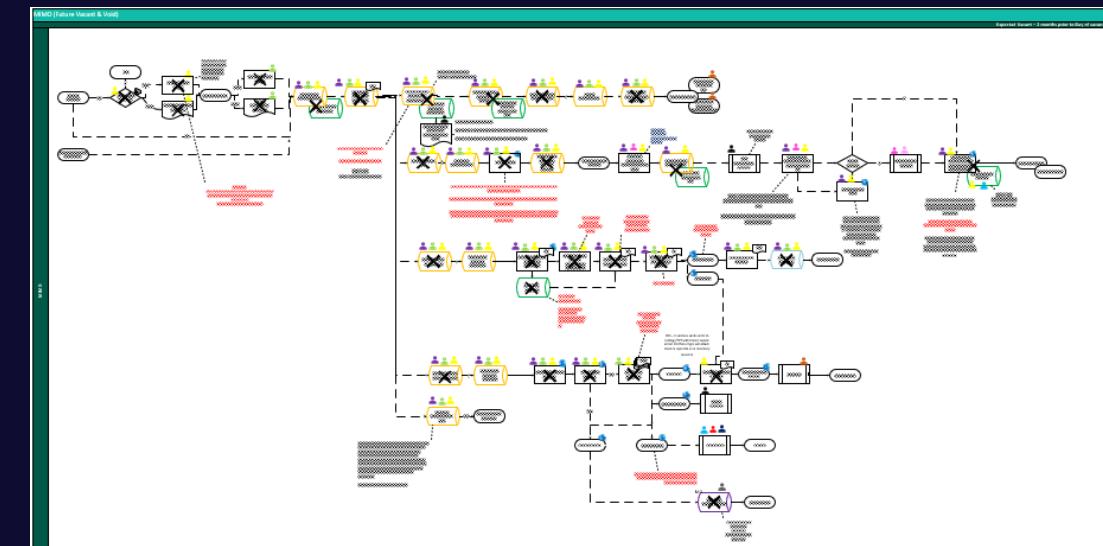
- There is often missing data including the reason for leaving
- Information is copy and pasted into evolution MRI
- Manual responses to emails, including reactive retention calls

Opportunity:

- Proactive rather than reactive retention, clarify roles and responsibilities with retention team
- Digitise and structure the notice to quit, aligned with the fields required in evolution MRI
- Integrate the data points to the systems required
- Automate the data entry of multiple steps
- All data required for move out email moved into system so email does not need to be edited, automatically sent to tenant
- System approval workflow on whether the future vacant email is distributed and automated emails to team email addresses
- Utilise customer facing technology to prompt tenants to self serve their own appointments
- Automated actions that do not require human intervention, such as changing the direct debit in Salesforce to £0

Customer experience:

- Customer facing application to track their required tasks to vacating and are automatically notified of changes/ required actions



Delays on reletting properties

There is an opportunity to design structured logic-based rules on whether a property will be refurbished, based on its historic data, removing manual decision points, with an exception only workflow to PMs and relet dates standardised for marketing

Lettings Managers discussed delays and time spent chasing regarding marketing relets

- Time taken to confirm whether a property will be refreshed, refurbished or sold
- For a refresh, a standard 5-day TAT is estimated
- For a refurbishment, Lettings are notified of practical completion by URM during handover to contractors, which triggers marketing

Third Party (Agents) are not completing system steps correctly:

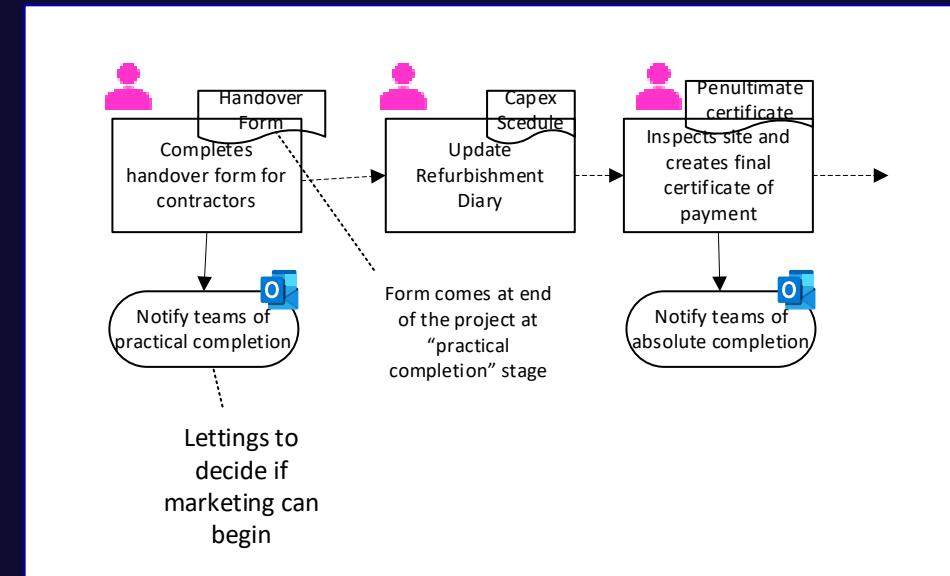
- Integration is not working between portal and SF
- Manual steps are taken to transfer information via email

In person viewings take a lot of organisation:

- 85% in the North are let via video alone
- In the south the majority are done in person

Opportunities:

- Proactive tagging of properties with a strategy to sell
- Proactive tagging of properties that require refurbishment
- Potential for a rules-based logic for whether a property should go into a refurbishment approval workflow:
 - length of time since previous works
 - properties not marked proactively to be sold
 - Provides an early indication on relet date
- Retraining third parties and Lettings team funneling back to portal to ensure adoption
- Pushing video lettings in the South, WhatsApp integration/ utilise customer app for off system comms with tenants



10+ handover points during move out

By simplifying technology/ integrating data points, the end-to-end process will become available to all functions and should reduce the handover points required via email and consequent delays , reducing TAT



Customer Services (PRS) & Property Managers (BTR) will update stages of the tenant moving out through Evolution MRI

- Evolution MRI is used as the main tracker for legionella however there are no auto notifications, and it requires the assigned person to navigate into the task to track when this should be completed
- Inventory is processed via Inventory hive with forms uploaded and the meter readings submitted to Evolution MRI manually, which is often forgotten
- Asset Mgt & Lettings rely on Qube reporting to track voids/ voids cost and notify that the unit is ready to market
- This information is also duplicated in Qube for key dates (Vacant date) and notes on the Void/ Refurbishment. This is then closed once completed
- Due to the system not being user friendly on a field/mobile device, there are often delays to update MRI/Qube
- Delays in updating systems and sending through communications via email leads to a lot of to and fro/ chasing and duplications of work
- Rescinding notices and delays in refurbishment works are often difficult to track across numerous systems leading to off system communications, chasing and delayed updates to customers

Manual steps taken during move out

There is an opportunity to reduce the manual keying of data during the move out (MIMO), reducing ~6 manual steps by automating the input/output of required data and communications to third parties

Property/Portfolio Managers and Customer Services, receive the check out inventory form via email or inventory hive, which they then extract and input the meter readings to MRI

- Waiting/chasing the meter readings
- Human error on input
- Manual extraction and input from system/form to internal system
- Manual Utilities/ Council Tax notifications

Opportunities:

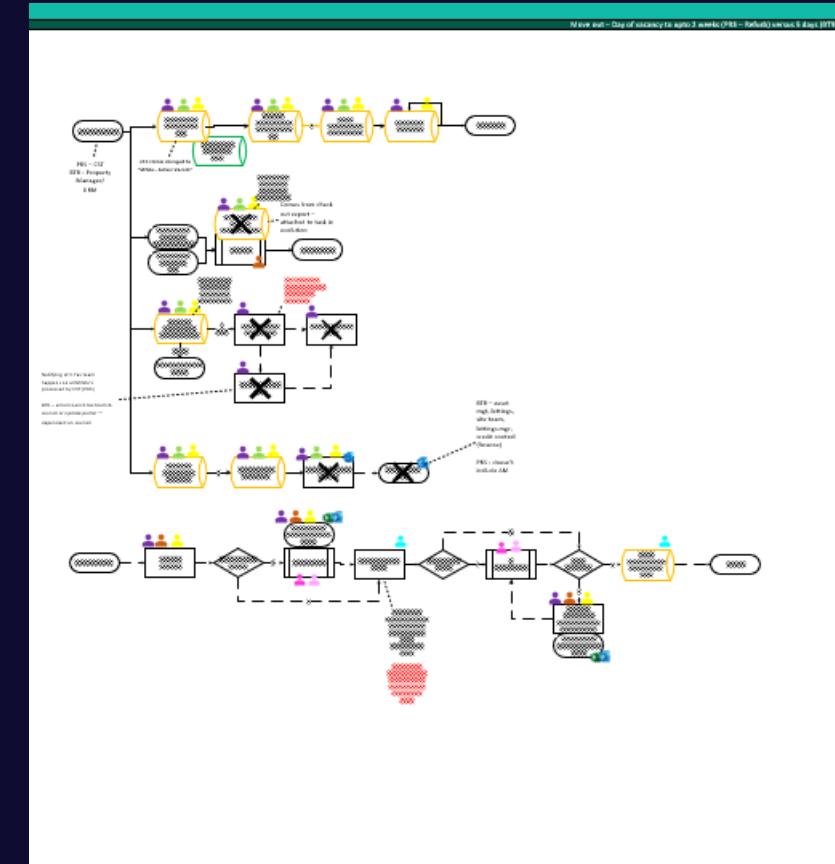
- Creating accessible systems to input information directly
- Integration from inventory hive to MRI
- Structured form inputs or RPA, which then feeds the data to all areas it needs to be collected
- Utilising customer facing technology for them to be able to self serve input of meter readings

Emails are manually sent out to 9 different business areas to notify of vacancy

- Template auto created and forwarded to business areas

Opportunity:

- Auto notified directly without human intervention, can cc in PM, based on Meter reading input
- Standardised email inboxes for functions
- Visibility for all functions to track within systems



3+ handover points during deposit return

By simplifying technology/ integrating data points, the end-to-end process will become available to all functions and should reduce the handover points required via email and consequent delays , reducing TAT



- Deposit Return Instruction (DRI) form is delivered by Property Managers/ Service Desk, as early as possible, via the tenant move out email (notice to quit confirmation), this is off system and uploaded to Docushare once received.
 - There is currently nothing on the system to log that this has been received and relies on communication to parties involved, predominantly Finance
 - This leads to and fro as the bank details are required (to be returned on the DRI)
 - There are legal requirements on returning the deposit within several days of the tenant moving out (10-15% do not meet timeline)
 - It is currently unclear how the legal return timeline on deposits is tracked/proactively prevented
 - Currently if a DRI is not returned, the deposit will not be processed (<2%)
- Following an inventory check, during the move out stage, the damages are detailed on an inventory return form which is then keyed into MRI with a Deposit Resolution Update. Once a Return of Deposit Form (or email in the North), is agreed with the tenant, Finance can begin to process the return.
- Finance rely on being included in the Future Vacant email chain to give notice of an upcoming deposit return. They must then receive the DRI and ROD to return the deposit, both emailed via Property Managers/Service Desk. Finance often are not copied into emails and spend a lot of time chasing both forms and updates due to legal requirements on deposit return timelines
- It is Finance responsibility to update/close account and stop charges on Qube, and to amend and cancel the direct debit on Salesforce. The DRI therefore must contain a Qube reference which is manually retrieved from the system once the form is created in MRI

Manual steps taken during deposit return

There is an opportunity to reduce the manual creation of documents during the deposit return, reducing ~4 manual steps and 10-15 elapsed time per account, by automating the input/output of required data and communications to tenants

PMs must edit a Deposit Return Instruction (DRI) form for each move out, which requests the tenant bank details

- DRI auto created in MRI, updated with tenant information and attached to the move out email
- A lot of time is spent chasing this instruction (10% of move outs)
- 10-15% are not returned within timeframe
- Bank details are emailed between functions (GDPR)

A return of deposit form is created for each return

- Agreement of return amount is sent within multiple email in North, and within ROD in South
- Finance manually perform stop actions across multiple systems, taking 2-3 mins per account

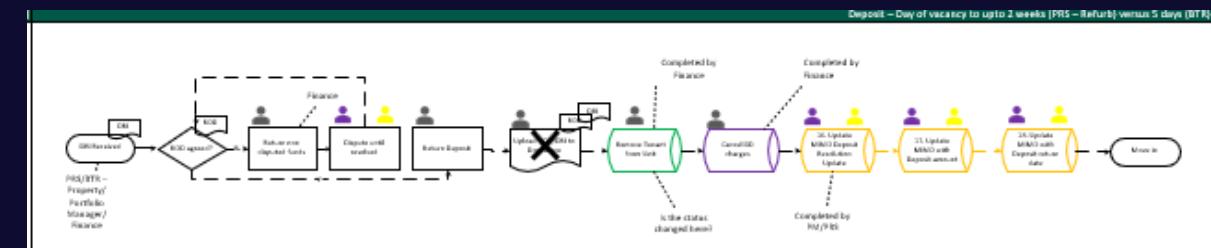
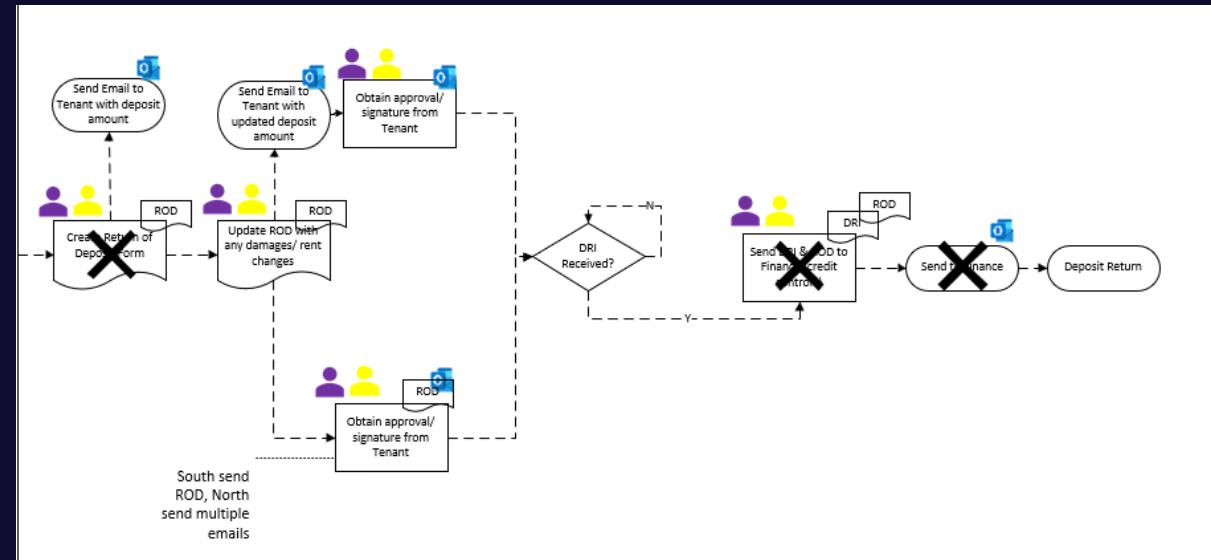
Total time taken to return a deposit is 10-15 mins

Opportunity:

- Use automation to process deposit returns and actions
- In-system approval workflows
- Integration/RPA when tenant is removed, other steps in other systems are auto actioned

Customer experience:

- More secure data transfer (GDPR)
- Faster turnaround on deposit returns



4+ handover points during move in

By simplifying technology/ integrating data points, the end-to-end process will become available to all functions and should reduce the handover points required via email and consequent delays , reducing TAT



- The move in task begins with the property updated to “ready to market” within MRI, usually completed by the Property/Portfolio Manager following a site check on completion of works
 - There are sometimes delays at this point if works have not been completed to standard, the lettings due date should be updated at this point in Qube for reporting to other teams
- The move in appt is scheduled by the lettings team and input to MRI, assigned to a resource. With every update to the system every field in each system must be updated to align with changing timelines, leading to miscommunication and errors
- Uncertainty on responsibility to close Void Notes/MRI meaning these are often left open until next tenant leaves
- Multiple paper compliance forms are completed during move in session, scanned and uploaded to Docushare. The forms are signed and dated by tenants. This can be 10+ documents depending on the property type.
- There is integration within adobe which is used for certain forms to be signed and returned/uploaded electronically. Interviewees were unsure why the paper documents did not follow the same process.
- **Move in checklists are used to track activities are completed, which must be signed and dated:**
 - No ability to easily track each move in on MRI or across systems, only in Salesforce

Manual steps taken during move in



There is an opportunity to reduce the manual creation of documents during the move in, reducing ~15 manual steps by automating the input/output of required data and communications to tenants

PMs must update actions in MRI/Qube manually that are already input by Lettings/TPT to Salesforce

- Application received, move in date, Wishlist completion date, notes on void
 - Meter readings from inventory check in
 - Tenant information

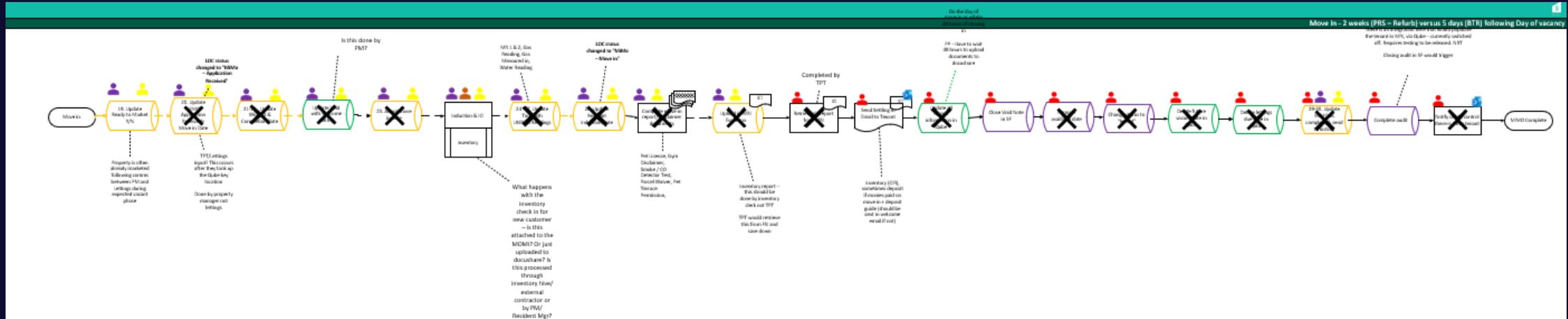
During the move in appt, 10+ paper compliance forms are completed, scanned and uploaded to internal systems

Multiple steps are completed in SF, Qube and MRI to close a lease that could be populated with one trigger point

- Includes email notifications/ information for customers e.g. (welcome email, settling in email)

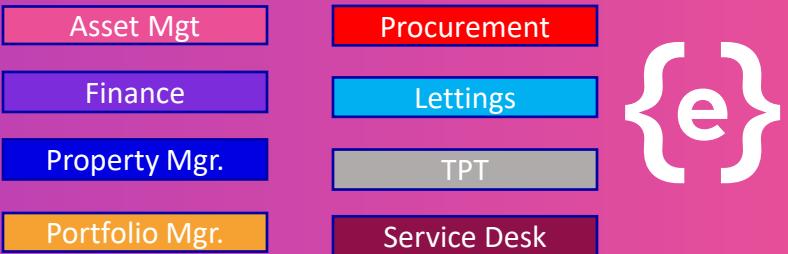
Opportunity:

- Digitise compliance forms, integration and/or RPA to input the same data to multiple systems



People process items differently

There is an opportunity to right size teams, clarify roles and responsibilities with clear RACIs, handover points and trainings in place to ensure “one” process is adopted, and accountability taken



Lettings offers are not being completed in a standardised way

Pre vacation inspections should be logged in an MRI task but are not always tracked

Move away from Qube so recent hires have not been told to update Qube or been given insufficient training

Final check performed day before move in which sometimes leads to a hectic day arranging final cleaning etc

Sometimes must create the void note in Qube even though it should already be there

Information often not updated on Qube by Property Managers, currently a lot of property's are not marked as furnished

Huge difference in the way people log data upfront in MRI which really impacts TPT leading to a lot of chasing

Struggle to train their teams and advise on best practice as they do not feel confident in the process themselves

Chasing contractors for quotes – 3 teams doing the same thing – 10-day TAT. Often too late and miss 10-day KPI

New MIMO process is harder – there is no ownership and is difficult to understand which tasks need to be done

Notice to leave given through various inputs by different people and funnelled to written email

Don't have any training on MRI & SF so don't use them for any reporting/information

Get a lot of queries on whether someone has moved out – sometimes they forget to update Qube

Often direct debits are not set up prior to move in putting the tenant in immediate arrears

The North has a 3:1 unit to PM ratio & the South is 1:1

Legionella and Meter Readings are often not prioritised as well as other compliance aspects such as smoke detector testing, leading to vague and inconsistent audit trail

There are many system limitation perceptions



There is a longer-term opportunity to apply best fit technologies to "one" process, utilising/ expanding or integrating existing technologies and applying RPA to data transfer logic that can't be integrated.



- No remote access, limiting near real time updates
- Misalignment of unit data to Salesforce, leading to manual editing
 - Documents cannot be uploaded to Docushare until 48 hours after updating unit on Qube
- Currently only integrated with MRI at static data level and does not integrate transactionally
- Refurb information is held within notes and is not structured in a way to easily report on
- Parking spaces logged as individual units – unclear whether unit has a parking space



- No remote access, limiting near real time updates
- All functions do not have access
 - All contact with contractors is usually completed off system due to restrictions on insurance requirements, led to a workaround in Proactis
- Set up at unit/block level. Can't issue multiple POs for one unit
- No tracking capability/dashboards
- No integration to Inventory Hive

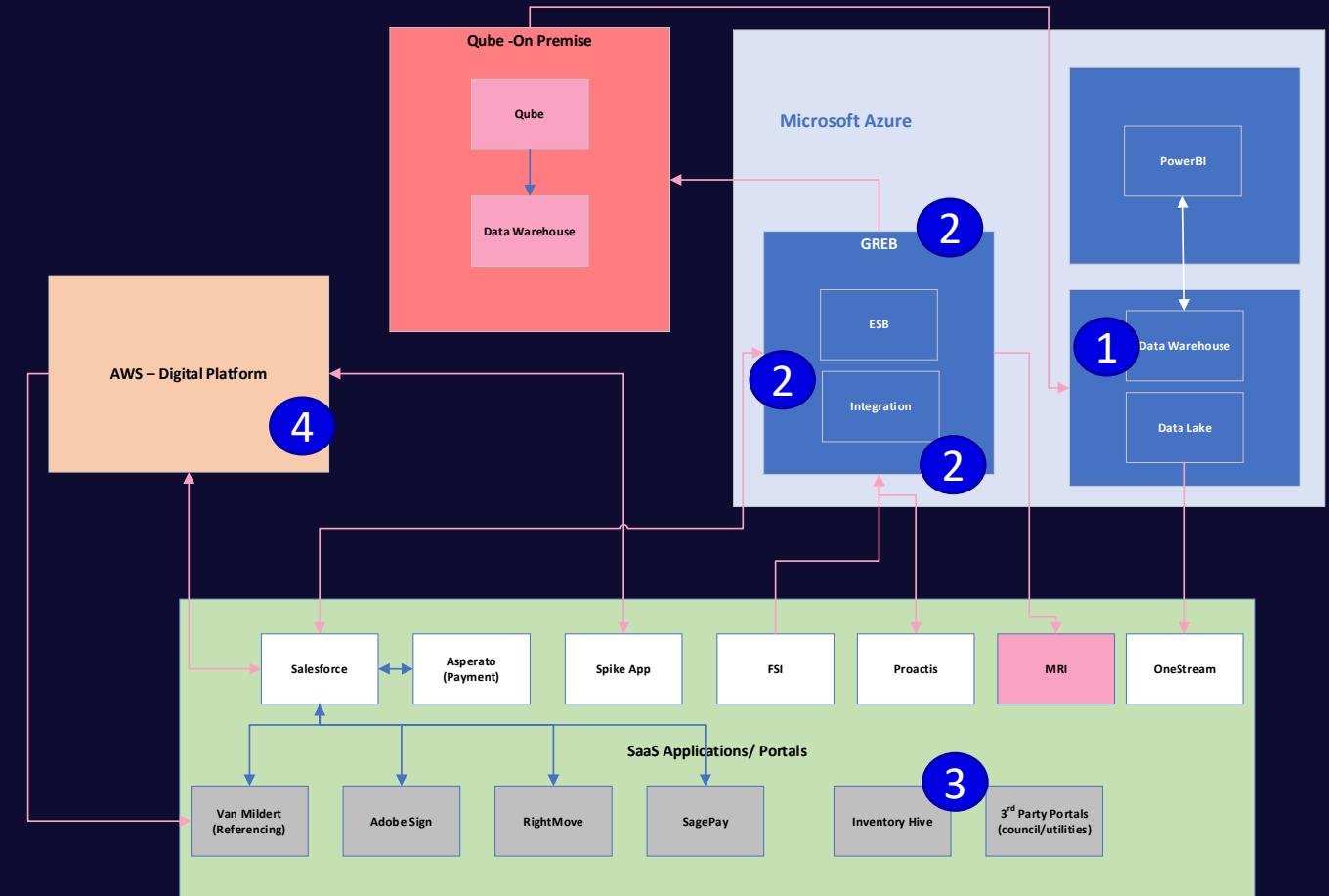


- All functions do not have access/trained
 - No integration to car parking portals
 - No integration to outlook calendar
 - Outgoing email communication only
- Salesforce and WhatsApp not integrated
- Salesforce app not currently utilised due to data security limitations
- Customers can skip past Direct Debit, placing them in arrears from month one

Current landscape may not be utilised to full potential

There is a **longer-term** opportunity to apply best fit technologies to “one” process, utilising/ expanding or integrating existing technologies and applying RPA to data transfer on logic that can’t be integrated.

- 1 Qube data feeds to the Azure Data Warehouse, feeding to PowerBI for reporting. However, reports are being pulled from Qube in excel for reporting
 - 2 MRI and SF feed into the Azure integration and ESB service bus, feeding into Qube however it is unclear where this integration feeds between systems from interviews/manual work completed
 - 3 Inventory Hive & 3rd party portals are not integrated, information is double keyed between these systems
 - 4 Spike app is a customer facing application which integrates to AWS, also integrating to SF, however it is not being utilised for straight through processing from customers to SF and unstructured manual inputs are used



Data Gaps can often be a result of other challenges

Once “one” process is designed, and technology overlaid, there is an opportunity to create space in systems for required information, to upload historic intelligence and centralise to one version of the truth

Data Gaps and all other challenges are codependent and often influence or result in each other:

- Data input is all manual and prone to human error
- Double keying into different systems can lead to information being forgotten or delays to non prioritised systems
- Information shared outside of systems has resulted in localised storage of data
- System limitations/48-hour delays to upload information to Docushare
- Inability to track tasks end to end in one system leads to variances in data between business areas and isolated reporting/ ways of working – no one version of the truth
- A lack of accountability, prioritisation and training mean data is not always uploaded, leading to unknown downstream impacts
- Unstructured inputs to the system lead to unstructured fields, with note areas utilised which can be difficult to track, export and report on over time

Opportunity:

System changes to allow data to be stored centrally on system

- Perform data quality exercise to truly establish gaps/ quality
- Tactical automations to transfer documents and data from off system records
- Align documents and data recorded nationwide to ensure processes and data quality is standardised

Simplify the data input process:

- Applications that can be used out in the field
- Integrate/ automate transfer of information between systems
- All documents moved online to prevent delays in data upload
- Performance manage the field updates of systems in near real time to keep tracking visible and communication active and central

SWOT Analysis

Overview of the strengths, weaknesses, opportunities and threats (risks) of the process discovery and next steps:



Strengths

- Salesforce overall is working well with positive comments around the visibility and tracking mechanism of the dashboards from Lettings and TPT
- Automations within the MIMO task in Evolution MRI are helpful with emails auto created and documents provided
- Integrations from Evolution MRI to Utilities services work well
- Those who use the PowerBI report have commented that it is useful for financial reporting
- Pilots to standardise/simplify are working – Relet process piloted at 1 PRS property has had successful results

Opportunities

- Standardise and simplify to “**one**” process, regardless of property type, function or location
 - Pricing play book and price per property
 - Simplify transactional data collected and transferred to what is needed
 - Prevent double keying of system
 - Reduce documents created/handled by ~80%
- Create rules-based logic wherever possible to reduce variation, automate triggers and actions reducing the need for manual steps taken by ~50%
- Digitise input points between parties to ensure data collected is structured and aligns to the information required by the system
- Overlay best fit technology to “**one**” process

Weaknesses

- Process** - Complex processes with different ways of working, too many handover points
- Data** - Required information is often not available within systems, no visibility of the end-to-end process, no single version of the truth, no true picture of the voids cost or performance
- People** - Different resourcing between north and south, lack of accountability
- Technology** - System limitations, lack of integration/ automation, multiple systems

Threats (Risks)

- Not collaborating/ workshopping the redesign of the process to bring people along the journey and account for all variation
- Failing to follow strict design principles that account for “**one**” process, except for any legal requirement, customer issue or business need
- Not establishing clear RACIs (roles and responsibilities) and change mgt of the redesigned process into adoption
- Underestimating the need for KPIs and clear performance visibility to measure and continuously improve
- Not doing due diligence of technology research and implementing technologies that may not be best fit

Appendices

Discovery Methodology

The methodology taken during discovery and during the interview process, including objectives of findings:



Methodology

- Conducted 2-hour interviews across 9 business areas
- Understood each business area and the role played within the Voids Process
- Walk through of the process, discussing individual challenges and pain points
- Discussed the systems used, documentation produced and transferred
- Collated challenges to high level themes and prioritised between business areas
- Explored the root causes of challenges to recommend an opportunity summary for improvements

Objectives

Process

- Identify variation and understand where could be standardised

People

- Identify areas of inefficiency around roles and responsibilities

Data

- Identify data gaps/ quality issues and how they can be alleviated including GDPR, controls and compliance

Technology

- Identify the touchpoints of different systems and where these could be aligned, integrated or utilised better/ expanded
- Understand areas of the process that could be automated to increase efficiency and reduce voids time/costs

Deliverables – Review Findings

Presentation:

- Process discovery PowerPoint
 - Background
 - Executive summary
 - High-level briefing
 - Detailed findings
 - Next steps
 - PEX Assessment & Guidance

Written document:

- Process discovery document
 - Process maps
 - Process per function
 - Process per property type
 - Process per location
 - Process Metrics
 - Lean Assessment
 - Opportunity Grid
 - Opportunity Assessment

Process Mapping - Key



Process Metrics (1 of 3) :

Number of steps taken per function during the MIMO process, per property type and location (north versus South):



Business Area*	PRS Stabilised		PRS Reversionary		Bill to Rent	
	North	South	North	South	North	South
Portfolio Managers	56	43	84	71	x	x
Property Managers	x	x	x	x	87	74
Customer Service Desk	30	30	x	x	x	x
<i>Refurbishment</i>	x	20	x	20	x	x
Lettings	19	20	19	20	23	23
Tenancy Progression	23	23	23	23	23	23
Finance – Credit Control	7	9	7	9	7	7
Asset Mgt	17	13	17	13	14	14
Procurement	1	1	1	1	x	x
Total	153	159	151	157	154	141
<i>Total (internal)**</i>		<i>139</i>		<i>137</i>		

- External contract work is not included – Marketing, Inventory, Lettings Referencing

** Does not include Unit Refurbishment Management tasks provided by TFT

Process Metrics (2 of 3):

Number of documents created/ handled per function during the MIMO process, per property type and location (north versus South):

Business Area*	PRS Stabilised		PRS Reversionary		Bill to Rent	
	North	South	North	South	North	South
Portfolio Managers	20	18	20	18	x	x
Property Managers	x	x	x	x	20	19
Customer Service Desk	5	5	x	x	x	x
<i>Refurbishment</i>	x	9	x	9	x	x
Lettings	2	2	2	2	1	1
Tenancy Progression	14	14	14	14	14	14
Finance – Credit Control	2	2	2	2	2	2
Asset Mgt	4	4	4	4	4	4
Procurement	x	x	x	x	x	x
Total	47	54	42	49	40	39
<i>Total (internal)**</i>		45		40		

- External contract work is not included – Marketing, Inventory, Lettings Referencing

** Does not include Unit Refurbishment Management tasks provided by TFT

Process Metrics (3 of 3):

Number of emails per function during the MIMO process, per property type and location (north versus South):



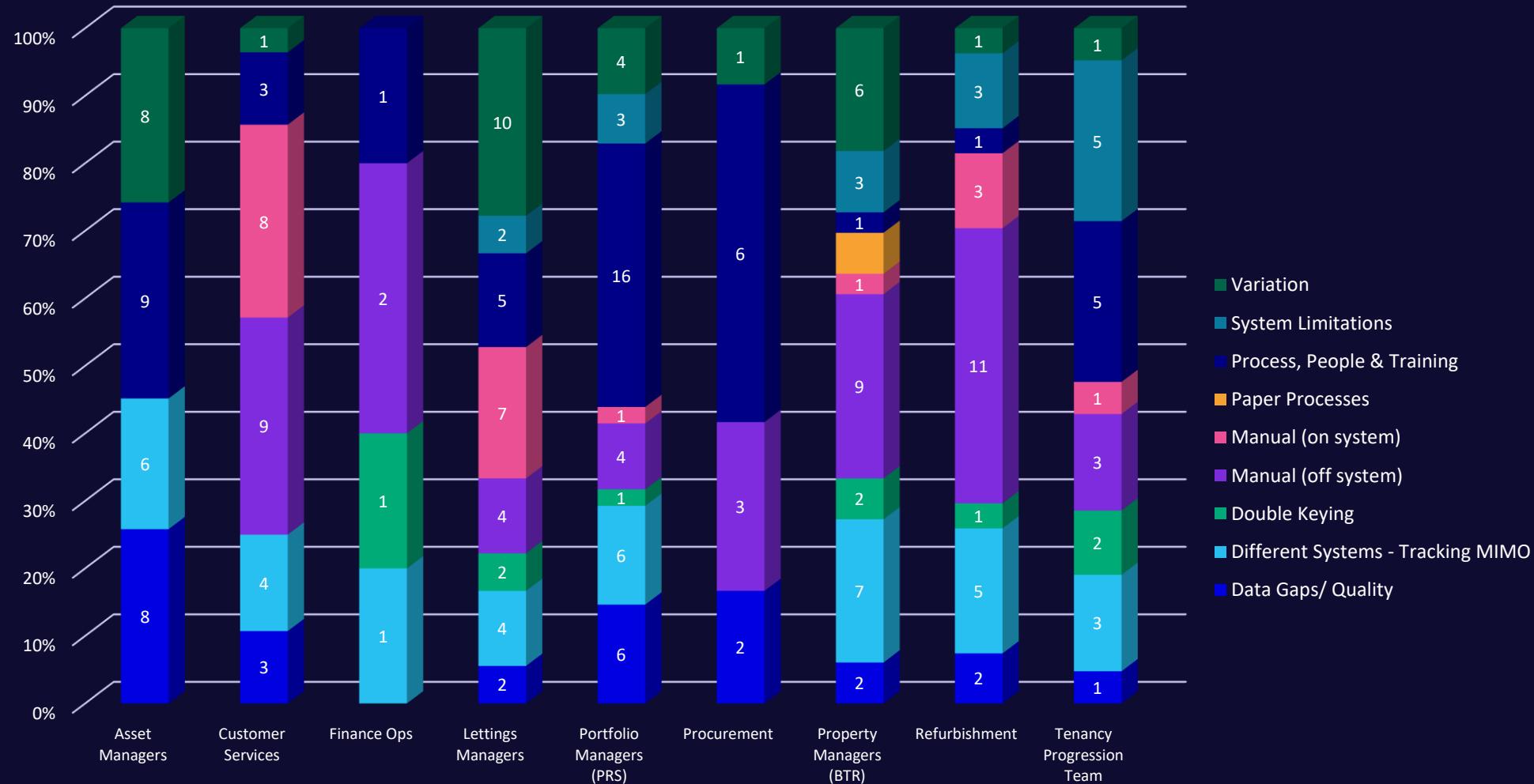
Business Area*	PRS Stabilised		PRS Reversionary		Bill to Rent	
	North	South	North	South	North	South
Portfolio Managers	13	12	19	18	x	x
Property Managers	x	x	x	x	19	19
Customer Service Desk	10	9	x	x	x	x
Refurbishment	x	5	x	5	x	x
Lettings	4	3	4	3	3	2
Tenancy Progression	3	3	3	3	3	3
Finance – Credit Control	3	3	3	3	3	3
Asset Mgt	5	4	5	4	4	4
Procurement	1		1		x	x
Total	39	40	35	37	32	31

- External contract work is not included – Marketing, Inventory, Lettings Referencing

** Does not include Unit Refurbishment Management tasks provided by TFT

Challenges by function

Interviews across business areas led to the output of **200+ challenge/ pain points**. Most challenges are common between areas and can be rolled up to the below main themes:



Interview Detail – Verbatim & Metrics



Verbatim provided by all functions during interviews, regarding process steps/flow, challenges, limitations, pain points

Metrics requested from functions* however the response rate was low and of those who provided figures, there were a lot of unknown and data gaps.

Summary of response:

Business Area*	Verbatim		Metrics	
	North	South	North	South
Portfolio Managers	✓	✓	x	x
Property Managers	✓	✓	✓	✓
Customer Service Desk	✓		x	
Refurbishment	**	✓	**	✓
Lettings	✓		x	
Tenancy Progression	✓		x	
Finance – Credit Control	✓		x	
Asset Mgt	✓	✓	✓	x
Procurement	✓		*	

*Metrics were not requested from Procurement due to minimal involvement

**Completed by Property/Portfolio Managers

Verbatim – Portfolio Managers (PRS)



"Difficult to figure out whether unit has a parking space"

"New MIMO process is harder – there is no ownership and is difficult to understand which tasks need to be done"

"Data on units has been stored within notes and off system leading to gaps in knowledge and within systems re units, lack of visibility across business"

"Not many are using the MIMO task, many are using emails."

"Meter Readings are often not input to MRI following the check out/ inventory report returned via Inventory Hive"

"Unstructured input for Notice to Quit, various inputs and funneled to written email"

"Roles and Responsibilities between Customer Services & us are unclear"

"PowerBI is not being used/ monitored by team – no remote access to dashboards so everything is tracked off system"

"PVI/PMI/water flushing are not prioritised"

"Established handover points with Property Managers are not used"

"Double keying of information to both MRI and Qube"

"Key Location/Release – more complex than it should be "

"No dedicated partner in Customer services so things often lost in translation, do not have strong knowledge of portfolios/units"

"Pre vacation inspections should be logged in an MRI task but are not always tracked"

"Ratio of PMs to units is 3:1 north compared to 1:1 in South"

"Portfolios have a separate office to site (different to BTR), meaning there are delays from work onsite being uploaded to systems "

"Retention calls made by Portfolio Managers after notice is provided, not proactive"



Verbatim – Property Managers (BTR)



"Multiple paper compliance forms completed during move in session, scanned and uploaded to docushare"

"Unstructured input for Notice to Quit – always have to request reason for leaving from customer"

"Manually inputting Meter Readings to MRI, when processed via Inventory Hive"

"Have to have "off system checklist" as tasks completed in different systems – microsoft list in south/ excel in north"

"Double keying of information to both MRI and Qube"

"Constantly checking SalesForce for information on move in date, with off system comms on details with Lettings/TPT in Teams as not in the system"

"Sending out update emails to different business areas (up to 9)"

"Managers all process tasks differently"

"Delays to relet days are communicated off system and often not updated in system, leading to customer complaints on move in day"

"Contacting utilities suppliers/Councils to cancel contracts (not automated in MRI for BTR) and supplying meter readings"

"All appointments arranged by TPT – communication sometimes bad between teams and have often had a tenant on site and have to arrange documentation signing/ taking deposits as has not been done before hand"

"If refurbishment work is needed, must raise "yes" in MIMO to notify however all contact with contractors completed off system, with different contractors/ways of working in each location"

"DRI/ROD is manual process, off system with updates re tenant details and editing and resending if changes"

"Parking must be logged in 3 systems – portal registration, net2. Access for carpark, register with locker system (if they have)"

Metrics – Property Managers (BTR)



Metrics provided for North only:

Description	Metric*
Volume of Expected Vacancies (monthly)	~89
Task Time to create documents	Not known
Lead time Expected Vacancy notification to Move out	~60 days (about 2 months)
Volume of Move outs (monthly)	~89
TAT on refresh	Not known
How many refreshes do not start on day 0?	Not known
How many refreshes overrun/ have issues?	Not known
Lead time Return deposits (move out date to deposit return date)	~7 days

* Metrics collected from stakeholders following interviews

Verbatim – Customer Service Desk (PRS – stabilised only)

{e}

"Get a lot of queries on whether someone has moved out - sometimes they forget to update Qube"

"Notice to quit received via many suppliers - tenants directly/ PMs and Renewals team"

"Logging of data from NTQ emails/ other emails into MRI"

"Manual notification to utilities and manual notification of vacancy to lettings team via email "

"Finding gas certificates is a major pain point - must look through MRI/shared drive"

"Emails are manually uploaded to MRI, must be edited first as does not accept email"

"If any delays all steps within system must be repeated and updated"

"Manual input of meter readings to MRI"

"DRI does not contain a Qube reference, this has to be manually retrieved and manually edited"

"Notice to quit received via email/ not structured input, in body of email - doesn't appear to be received via app"

"Information is input to MRI, this triggers the creation of two emails, these are emailed to the customer services agent for editing"



Verbatim – Finance



"Lack of consistency,
different communication
used/forms"

"Chasing for completion"

"Multiple updates of different
systems; Cancel direct debit in SF,
close account & stop charges on
Qube"

"Often receive request for a
return of deposit and haven't
been previously notified of a
future vacancy"



"Often direct debits are not set up prior to move in
putting the tenant in immediate arrears"

Metrics – Finance



Description	Metric*
Average Volume of Move outs/ deposits returned	~242
Task Time to perform stop actions on systems for payments	~ 2-3 minutes
Task Time to return deposit	~ 10-15 mins per deposit
% of move outs where you must chase for the DRI	~10%
% of deposits that are not returned within required timeframe	~10-15%

* Metrics collected from stakeholders following interviews

Verbatim – Asset Mgt



"Don't have any training on MRI & SF so don't use them for any reporting/ information"

"Refresh/Relet – North does not get support from wider team, South has SPM & Pm who approve pricing/ quotes "

"Move away from Qube so recent hires have not been told to update Qube or been given insufficient training "

"North is copied into future vacant/ vacant email to track MIMO whereas the South has weekly void meetings with other business areas"

Not notified of works completed and need to know to update tracker. Constantly checking Qube/ weekly Voids meeting"

"Only use Qube/ Power BI to run expenditure reports (void and future vacants every week"

"Not enough visibility of the condition of units - yearly visits not being recorded and shared to better plan"

"Lettings offers are not being completed in a standardised way"

"Information about the status of a unit/ tenant should be able to self served - no one source of truth"

"Don't have all knowledge saved in one place - very reactionary and not much forward planning done"

"Can't obtain history of buildings from systems, excel sheets collated by various teams over time. Refurb notes in Qube are unstructured"

"North receives a CUA Form and quotes, whereas the South receives a Job Auth Form with separate trackers"



Metrics – Asset Mgt



Metrics provided for North only:

Description	Metric*
Average volume of approvals	~ Approves 5 a week as an absolute max. Some weeks may get none
Average % of refurb/refresh	Mostly refresh as quantum of units requiring refurb has vastly diminished
Task Time to process an approval	10 mins
Task time to create Voids Reports	Done on Power Bi – takes 2-3 minutes
Task time to create/maintain Capex schedule (south) AMI Tracker (North)	To add each new additional approval to the AMI 5 mins
Average cost of a refurb	In last FY c£18k
Average cost of a refresh	In last FY c£3k
Average void cost for a refresh	Not known - This is being looked at by wider business at present to try and quantify
Average void cost for a refurb	Not known - This is being looked at by wider business at present to try and quantify
Average % that need to be reapproved due to changes	~5%
Average % that overrun agreed start/completion dates	Not known - don't track start and end date.

* Metrics collected from stakeholders following interviews

Verbatim – Refurbishment



"Use TFT as third party who deliver refurb process on Grainger's behalf, in the North property managers conduct themselves"

"Complete handover form (word doc) with contractors"

"URM only uses Qube/Proactis so information has to be input to other systems manually "

"Tenancy availability for visits"

URM will often update Qube/ via email and Property Managers/ Lettings will update SF"

"A lot of information is manually input to Qube, copying information from refurb reports to the refurb diary"

"No ability to track payments as PO's are not linked"

"Manual updates of refurbishment diary in Qube "

"URM use secure file share which gives read receipts to say info has been downloaded, provide quote back via email "

"Contractors are instructed to raise PO through Proactis "no PO no pay". Small works order prepared by URM and emailed to contractor"



Metrics – Refurbishment



Metrics provided for South only, North uses Property/Portfolio Managers:

Description	Metric*
Average Volume of Refurbs (Annual)	50-80
Task Time to create package (JA Form etc)	1-2 days
TAT on Quotes from contractors	5-7 days
Average TAT on refurb works (start to completion)	8-10 weeks
	20%
Average % of units that do not have floorplans	30%
* Metrics collected from stakeholders following interviews	
Average % of tenders with 2-3 contractors (more than 1)	90%
Average % of refurbs that start on Day 0 (move out day)	40%
Average % of refurbs that require multiple POs	100%

* Metrics collected from stakeholders following interviews

Verbatim – Lettings



"In the south we have weekly void meetings to determine relet dates whereas in the North it is typically 5 days TAT"

"Not all information provided on customer services email - need to often go back to property managers"

"Sometimes must create the void note in Qube even though it should already be there"

"Noting - must copy and paste emails/WhatsApp conversations to SF"

"Live works often can't hold to date - move in delay comms come from P Mgr. to Lettings who communicate with customer. Comms sent via outlook, logged in SF"

Teams have different access to systems and most comms are sent out of system due to this. Lettings/ TPT on SF and Customer Services on Qube"

"Differences between north and south on who completes tasks; North is TPT and South should be TPT but Negotiators are updating SF"

"There is a lot of double keying from Salesforce to MRI"

"Manual update in SF - unit status to "future vacant" and available date - should be auto updated but doesn't seem to work and the data is always the old date "

"Manual change of letting due date on the void note, and updates SF status to "on the market" "

"Use MRI for all other processes, only use SF/outlook within the voids process and MRI for invoicing."

"Information often not updated on Qube by Property Managers, currently a lot of property's are not marked as furnished"

"In the north the Service desk is more involved, handling inbound lead calls and logging information in Salesforce"

"Variation between north and south, including documents used and relet times and the way we market units"



Metrics – Lettings



Metrics provided for North only:

Metrics	North	South
Average Volume of Expected Vacancies	We don't have a report on this but in the last year we had over 1800 lets	
Average volume of leads	27,000	
Average volume of qualifying calls	22,000	
Task Time to create welcome emails	Responsibility of RS team but should just be a template so not that time consuming	
Task Time to create settling in emails	Responsibility of RS Team but should also be a template so not too time consuming	
Avg Lead time from property being ready to market to converting tenant	5 days	
% of move ins with delays	No way of reporting on this, maybe around 3%	

* Metrics collected from stakeholders following interviews

Verbatim – TPT



"Tenants are given a month to rescind, vacancy sometimes closed by other business areas and don't notify TPT, leading to failure of their KPIs "

"We must update everything in Qube once completed in Salesforce"

"If a let is closed down/lost - refund button auto changes in SF to "hold in basket", should change to "on the market"

"External agents do not say where keys are kept leading to issues on move in days"

Huge difference in the way people log data upfront in MRI which really impacts TPT leading to a lot of chasing"

"Often double keying information between Salesforce, Qube to align with MRI (especially year end) "stuck in the middle"

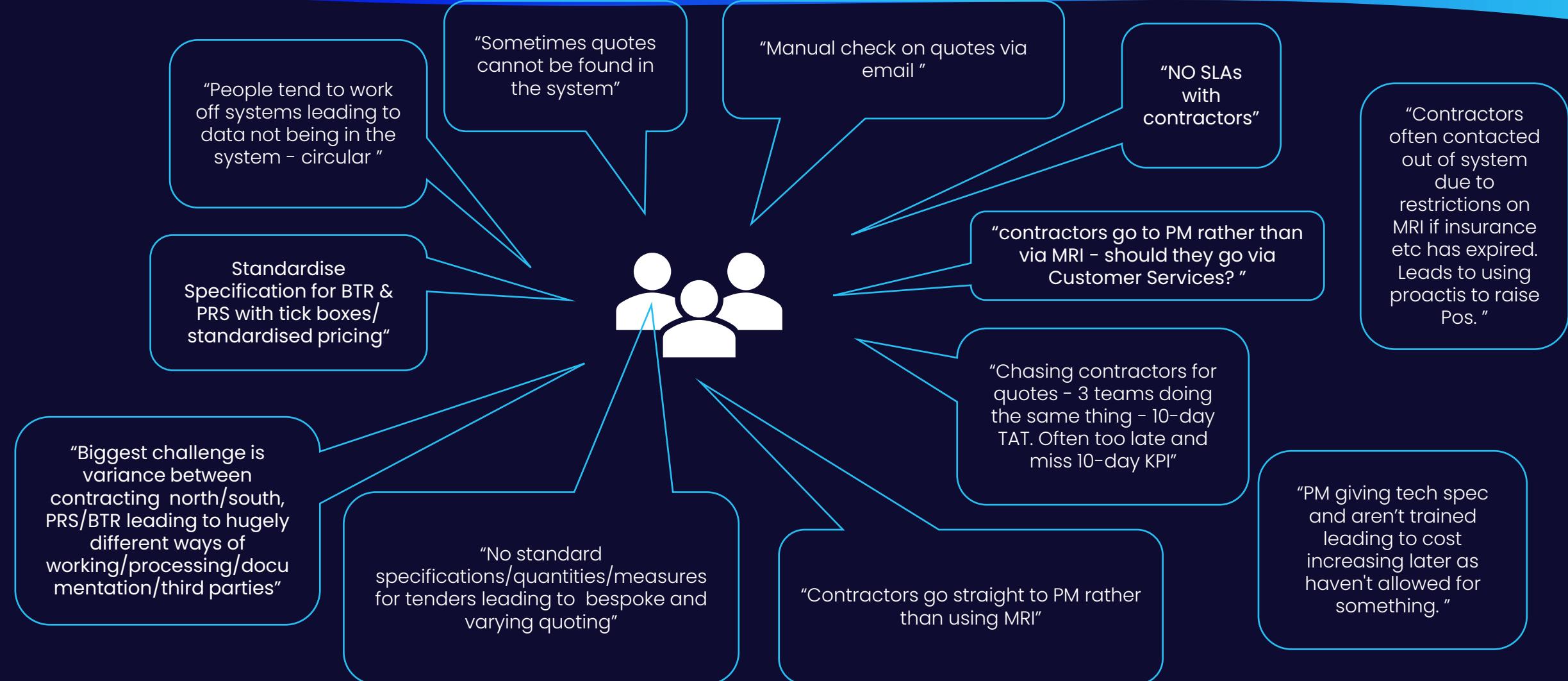
"Parking licenses are completed differently north to south. North does not interact with Qube, South uses Qube and a template for SF"

"Audit checklist is currently not being used due to being "too longwinded""

"Welcome emails - automation not currently used as systems not up to date with all documentation"

"Outlook/SF not integrated meaning manual rework between the two, to correspond meetings & appointments"

Verbatim – Procurement



Process Excellence Assessment (1 of 3)

Overview of process excellence maturity framework:



	Base	Evolving	Performing	Optimised	Next Gen
Process Understanding	Decentralised and non standardised documentation of processes. Knowledge of regulations and SLAs.	Framework for documentation active and aligning on future Vision and Strategy	Standardised documentation of processes, centralised visibility with all people and customers clear on consistent actions	Documentation model in line with QMS ISO 9001. Action documents embedded to track regulation processes and SLAs	Continuous visibility through digital process mining. Processes tracked, reviewed and amended to reflect evolution
Customer Experience	Traditional channels operating well, reactive to individual requests	Having a systematic approach to solving user and customer problems, engaging frequently, SLAs for processes in place	A clear and easy to digest customer service delivery model in place that is aligned to the business strategy	Proactive and strategic support to customers and their decision making, seat at the table	Customer and user led services, minimal/zero contact, real time delivery, predictive, customer experience is key driver of services
Process Efficiency	Non-standardised, fragmented, disparate processes. Manual effort. Around lower quartile in performance.	Global Process Owners for core processes. Driving standardisation and consolidation. Plans to automate/stop non-value adding tasks through the roadmap	Standardised processes throughout, Process governance driving continuous improvements. Automation successful at eliminating manual effort	Processes fully automated, exception reporting. Cycle times optimised. Benchmarks around top quartile	AI and Machine Learning, digitised Business Process Intelligence on core processes and metrics
People & Culture	Processes performed with little training, governance or bottom-up challenges "because we have always done it this way" mentality	Process Excellence vision communicated to Global Process Owners, aligned on future vision and strategy	Culture and training introduced, starting to bring people along the improvement journey through the Centre of Excellence	Change champions embedded within teams, challenging processes and making minor improvements	Introduce global technologies to empower colleagues to continuously nominate, prioritise and action changes for themselves and customers
Continuous Improvement	Lack of Process Excellence Vision or Strategy, a recognised need to realign core processes with the organisation's direction	Process Excellence team formed, active and aligning on future Vision and Strategy	Centre of Excellence created, and a Continuous Improvement Programme enabled	Roadmap of change delivering tangible benefits in line with strategy, positive customer feedback	Continuous refinement of existing processes, utilising the PEX framework, toolkit and technologies

Process Excellence Assessment (2 of 3)

Assessment of Grainger plc against the maturity framework:



Process Excellence Assessment (3 of 3)

Assessment of Grainger plc against the maturity framework:



ESTD 1912

	Base	Evolving	Performing	Optimised	Next Gen
Process Understanding		Business Optimisation team exists however process documentation is being completed by individuals, decentralized and with huge variation. No mapping templates or governance structure			
Customer Experience		Customer service desk in play to attend to customer experience/ issues however RSA/PM's main point of contact. No mention of VOC or feedback loops within process			
Process Efficiency		Business Optimisation team focus is on systems/ functions rather than by process, efforts towards RPA programme in past however automations are still not in BAU – adoption and data			
People & Culture			Business Optimisation team in play but no formal CoE. Evidence of training/ SOPs and lunch and learns and a continuous improvement mentality, although not widespread		
Continuous Improvement		Business Improvement team led by PMO, aligning to wider projects and business strategy. No business/ process analysts, improvement team are role shares			

Process Understanding (1 of 3)

Clear and reliable visibility of the way data flows through your organisation. Insight of Process Metrics and Pain Points to aid decision making.



Implement a QMS:

We recommend a Quality Management (ISO 9001) approach to process excellence governance, documented using a standardised and repeatable methodology.

ISO 9001 contains the requirements an organisation must comply with to become ISO 9001 certified, and is based on Seven Quality Principles that align with the {embracent} approach:

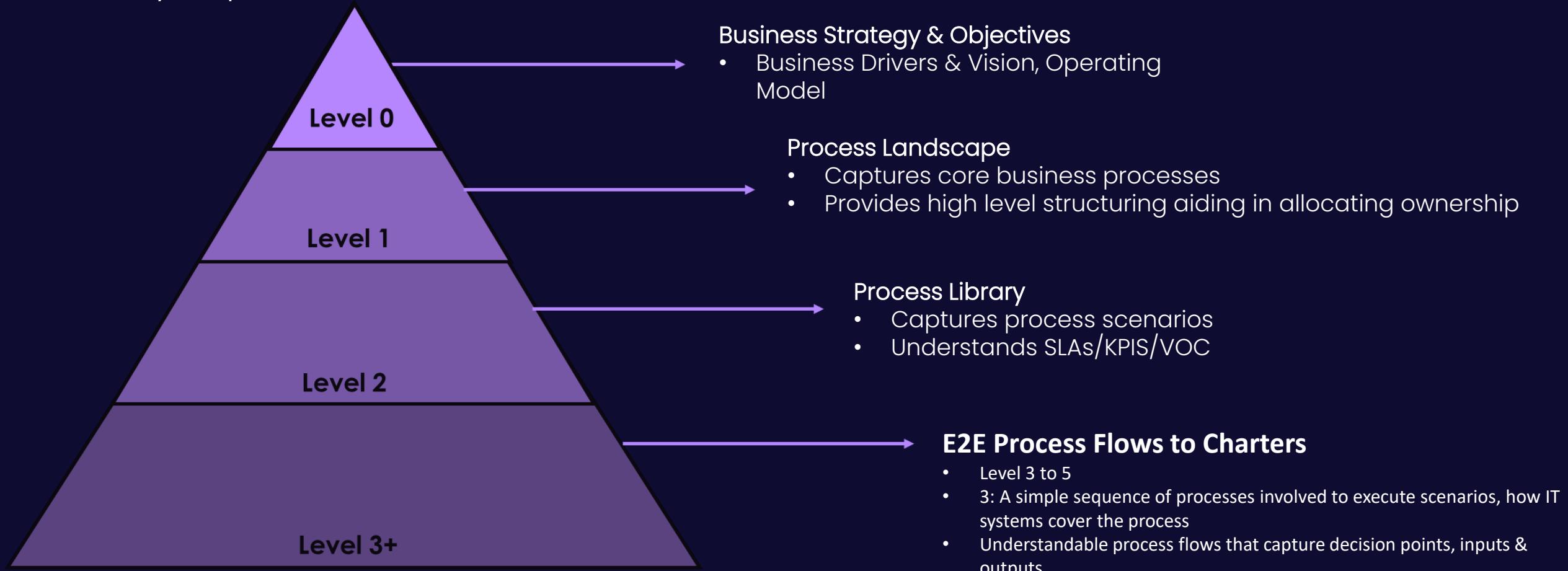
{e} approach	Customer Experience	People & Culture			Process Understanding	Continuous Improvement	Process Efficiency
ISO 9001 Quality Principle	Customer Focus	Leadership	Engagement of People	Relationship Management	Process Approach	Improvement	Evidence Based Decision Making
	Know and meet your customer's current requirements, predict future customer needs and always strive to exceed their expectations	It is the responsibility of Top-Level Management to create an environment where everyone can work to achieve the organisation's objectives	Training employees to ensure they have the tools and techniques they need to do their job and contribute to the organisation's success	Select suppliers and stakeholders that can create value by managing costs and optimising resources	Business activities should be managed as a process to achieve your desired result in the most efficient way	Your organisation should always strive to continually improve their overall performance – this should be a permanent objective	When data reveals that an area is underperforming, it is important to take corrective actions to improve performance

Process Understanding (2 of 3)

Clear and reliable visibility of the way data flows through your organisation. Insight of Process Metrics and Pain Points to aid decision making.



Document your operations:



Process Understanding (3 of 3)

Clear and reliable visibility of the way data flows through your organisation. Insight of Process Metrics and Pain Points to aid decision making.



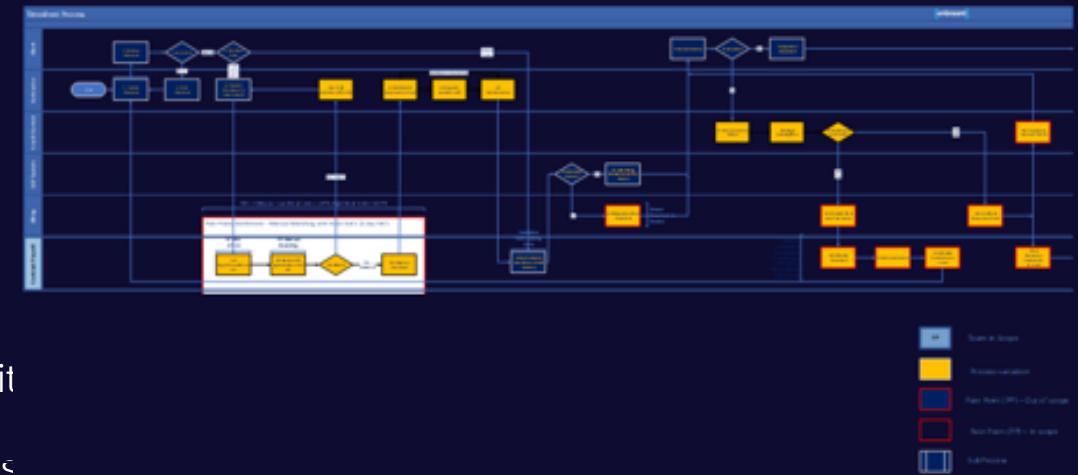
Understand and improve your operations:

Understanding the current situation ("As-Is", Level 2)

During an initial understanding of core processes. We challenge on the below two points:

- How do processes and systems currently work?
- How well do they perform?

1. Understand your high-level core process scenarios
2. Appreciate the business areas Involved, upstream & downstream dependencies
3. Establish breadth of process variation
4. Recognise process pain points including integration and data quality issues/ error rates
5. Identify cycle times, volumes, frequency, Required FTE & peak process times
6. Understand your KPI/SLA touch points and assess performance against vision



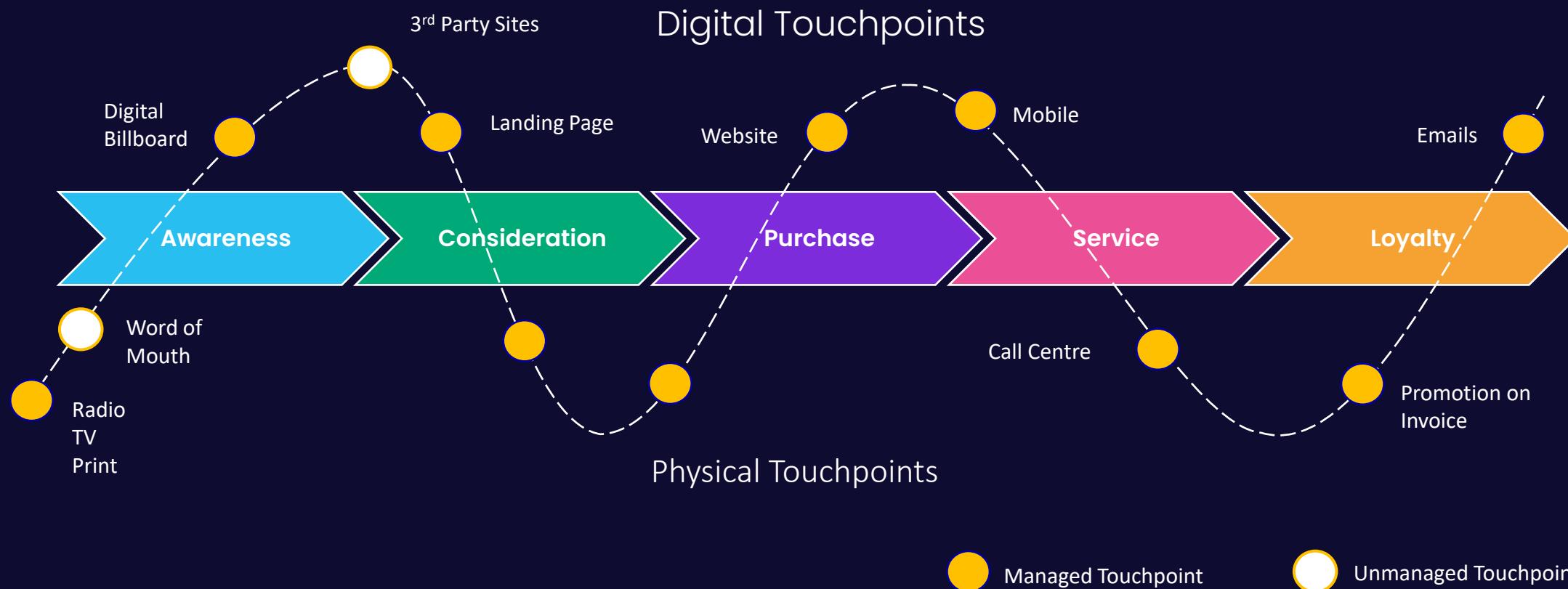
Customer Experience (1 of 2)

Processes built around the customer voice and their needs and expectations



Map your Customer Journey:

Customer Journey Mapping is the process of creating a visual story of your customer's interactions with your organisation. This can help your business to see things from the customer's perspective.



Customer Experience (2 of 2)

Processes built around the customer voice and their needs and expectations



Collect VoC (Voice of the Customer):

It is important to understand the Voice of the Customer (voc) to establish the critical-to-customer requirements (CTCs) and then define the critical-to-quality characteristics (CTQs) of your processes. embracent recommend using Lean Six Sigma tools and techniques to gather the VOC.

VOC Roadmap:



Techniques to gather VOC data include:



Customer interviews



Online or in-person customer surveys



Monitoring website behaviour



Recorded call data



Live chat

Process Efficiency

Utilising tools and techniques to simplify processes, stripping waste. Implementing best fit technologies to deliver and track efficiencies



Use a Lean Six Sigma (LSS), Continuous Improvement approach:



People & Culture (1 of 2)

Engaged and enthusiastic improvement initiatives through an established process
excellence culture



Make change stick:

Making change stick is critical, whether technology enabled or other. The change curve is well documented and understood, but in our experience often not applied

Change management has four key phases:

1. Shaping the change
2. Readiness for change
3. Delivering successful change
4. Embedding change

Building effective change leadership into the roadmap is vital to ensure that the business is prepared and ready for the “downs and ups” that lie ahead

Sell the Future Vision

...driving ownership of the change and 'Winning Hearts and Minds'

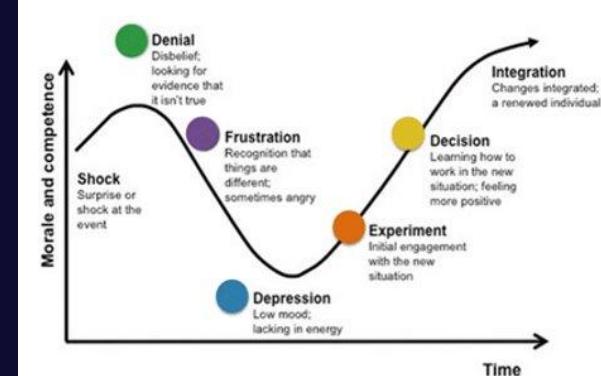
Manage business benefits and change adoption

...to increase odds on achieving the expected outcomes of the change

Lead people

...through complex, business critical, time critical change

The Kübler-Ross change curve



Create Alignment

Maximize Communication

Spark Motivation

Develop Capability

Share Knowledge

Develop others

...in understanding and applying change leadership techniques to drive business success

People & Culture (2 of 2)

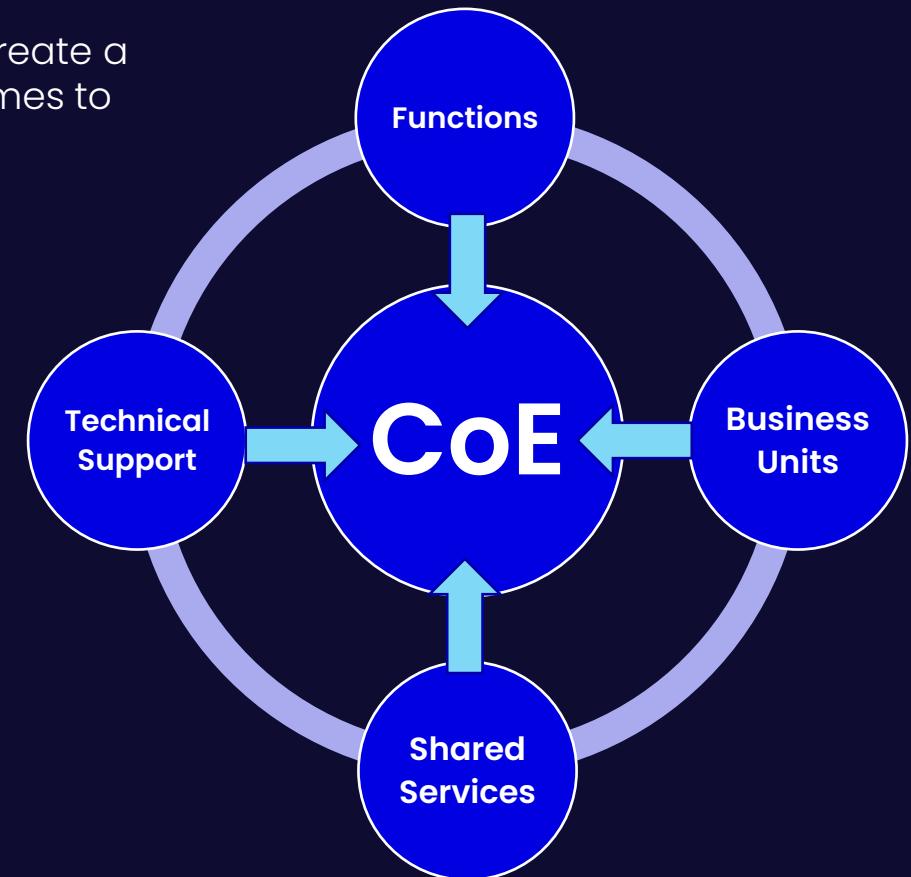
Engaged and enthusiastic improvement initiatives through an established process excellence culture



Create and embed a process CoE (centre of excellence):

What is a CoE?

- A process CoE brings together stakeholders from across the organization to create a single, well-defined group that is responsible for making decisions when it comes to companywide processes..
- Hybrid representation of SMEs, IT, Decision Makers and Change Managers
- Enables improvement scalability through the establishment of business wide:
 - QMS standards, processes and procedures
 - Sharing best practices
 - Driving common technology adoption
 - Creating a robust governance model
 - Tracking existing KPIs/SLAs and improvement
 - automations and
 - Removing barriers to success
 - Identifying and prioritising business wide Candidates for improvement



Continuous Improvement (1 of 2)

Continual evolution of processes through incremental and breakthrough improvements



Combine all process excellence elements to keep the momentum going:

- Reassess your vision and strategy for process excellence annually
- Maintain a centre of excellence to maintain standards/governance and manage and drive in change
- Continually understand the needs of your customer through feedback and touch points in processes, measured in KPIs
- Empower and educate people to challenge the status quo, tailoring processes to meet customer needs as well as their own leaving change to come bottom-up as well as top-down
- Monitor core process and regulatory metrics to track, assess and amend your processes/ train your people
- Scale your improvement journey through intelligent automation, leading to a more strategic and thoughtful workforce
- Stay ahead of efficiency and process intelligence technologies, evolving and working smarter rather than harder



Continuous Improvement (2 of 2)

Continual evolution of processes through incremental and breakthrough improvements



Implement technologies to elevate your improvement programme, in line with your vision:

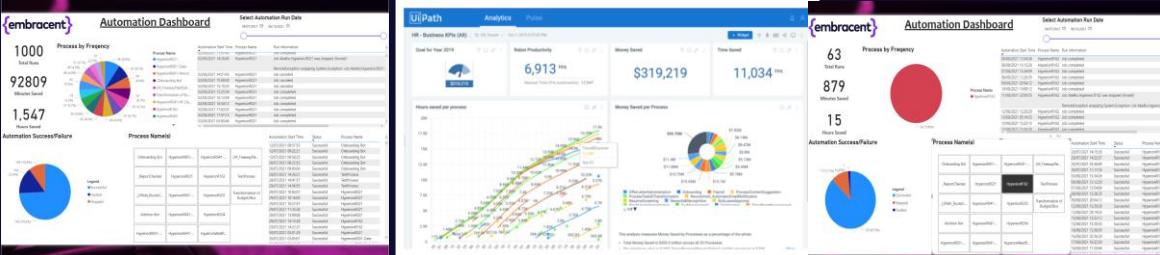
Digital process/task mining

- Tracking processes digitally, directly from your systems
- Uses System event logs and timestamps to map in near real time
- Exposes variations from the norm and tracks cycle/lead times and errors down to employee level



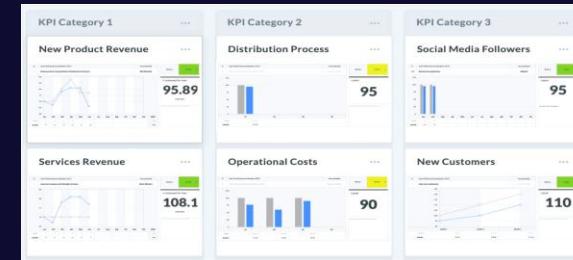
Automation analytics dashboards

- Tracks running of automations business wide
- Allows easy analytics of benefits and barriers to success/ data quality issues



Process intelligence dashboards

- Tracks performance of core processes/ Business Objectives
- Measures Key metrics (KPIs/SLAs/VOC against set targets over time)
- Informs tactical and strategic reporting/decision making



Process identification & prioritisation software

- Your people across the business have access to nominate and assess processes for improvement/automation
- Encourages bottom-up approach and standardises documentation and governance

