



## Grainger Renewals Journey



**There's always a better way**

## Grainger Renewals Project

Grainger plc have engaged with Open Box to redesign the existing **Renewals Journey** in their Salesforce org.

The renewals process is currently shoehorned into the Salesforce leasing journey, designed primarily for new leases. Many key inputs for this process are held **out of system** (including price book rent in spreadsheets) or in other systems (such as arrears balances in Qube), requiring considerable **manual effort** to **cross-check information** between systems and key into **offline spreadsheets** that are circulated between teams. Limitations with the **existing portal** in which tenants review renewal offers, result in tenants being regularly unable to access the portal.

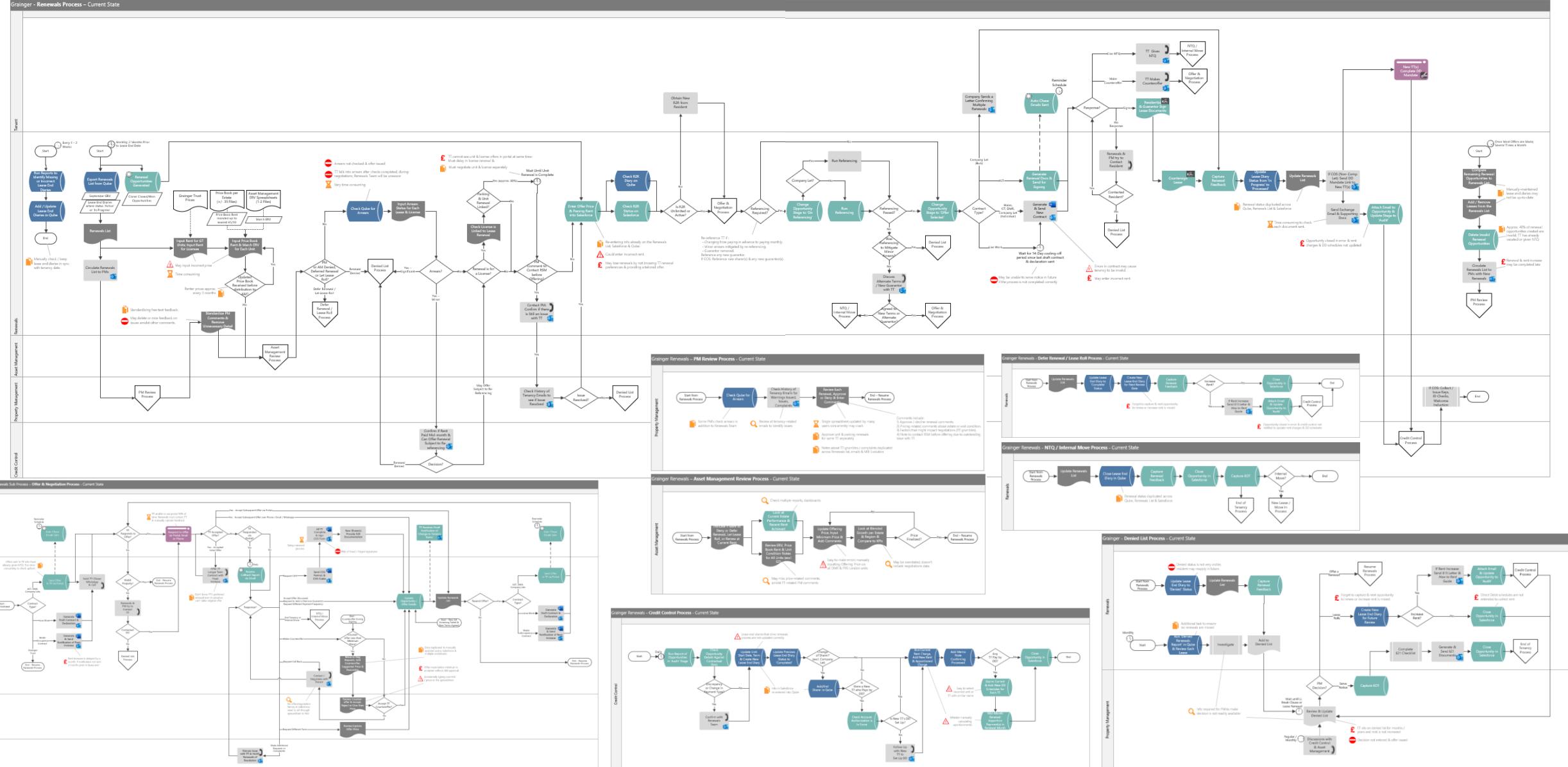
The likely introduction of the **Renters' Rights Bill** in 2025 must additionally be considered as this will have a notable impact on the renewal process for the majority of Grainger tenants.



# Current State Process Flow



## Significant Inefficiencies, Risks & Off-System Processes



# Current Risks & Challenges



## Risk of Monetary Loss

- NTQ received late.
- Lease end diary not captured / incorrect.
- Delayed rent increases for Wales must wait a further month.
- Tenant sits on denied list for years & rent is not increased.

## Time-Consuming Tasks

- Duplicate data entry across Qube, spreadsheets and Salesforce.
- 40% of renewal opportunities created in Salesforce are incorrect.
- Tenants unable to use renewal portal 50% of the time & contact staff directly.

## Risk of Errors from Significant Manual Data Entry

- Inputting incorrect prices.
- Accidentally overwriting or deleting information on the spreadsheet

## Risk of Renewing Tenancies that should be Denied

- Tenant falls into arrears after checks.
- Renewals not aware of decision to serve notice.
- PM comments are deleted in error when unstructured feedback is cleaned-up.

## Lack of Visibility & Easily Accessible Information

- No history of offers, counteroffers and tenant responses hinders negotiations and decision-making.

## Limited Controls

- Arrears checks are missed in error.
- AM approval for offers below minimum price is skipped in error.

# Vision & Objectives



## Project Vision :

Replace the existing tenant portal for renewal offers as well as the offline renewal spreadsheets with an enhanced Salesforce Renewals Journey that minimises manual data entry, removes the need to cross-check information between Salesforce and Qube, and delivers functionality that will remain relevant once the Renters' Rights Bill is enacted.

## Key Objectives :

Deliver Functionality Relevant for Renter's Rights

Replace Offline Renewals Spreadsheet

Eliminate Manual Input of Price Book Rent & ERVs

Provide Visibility into Tenancy Arrears in Salesforce

Create Renewal Opportunities from Accurate Tenancy Data

Maintain Offer & Counteroffer History

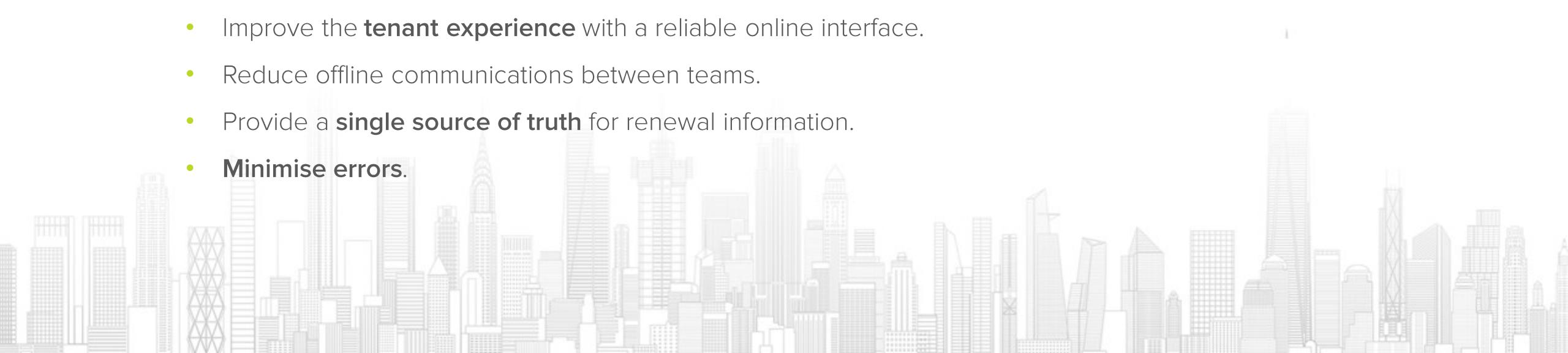


# Business Benefit



Redesigning the Renewals Journey will help to:

- Obtain notice to quit from tenants earlier in the process, **minimising void days**.
- Highlight renewals approaching deadlines to **avoid delayed rent increases**.
- Allow business to **scale** operations without necessitating a linear increase in headcount
- Build the foundation for a **single view of customer** within Salesforce.
- Improve **speed & efficiency** of the process.
- Obtain **renewal preferences** from tenants upfront, allowing for renewal offers to be tailored.
- Minimise back-and-forth between tenants and renewals negotiators.
- Improve the **tenant experience** with a reliable online interface.
- Reduce offline communications between teams.
- Provide a **single source of truth** for renewal information.
- **Minimise errors.**

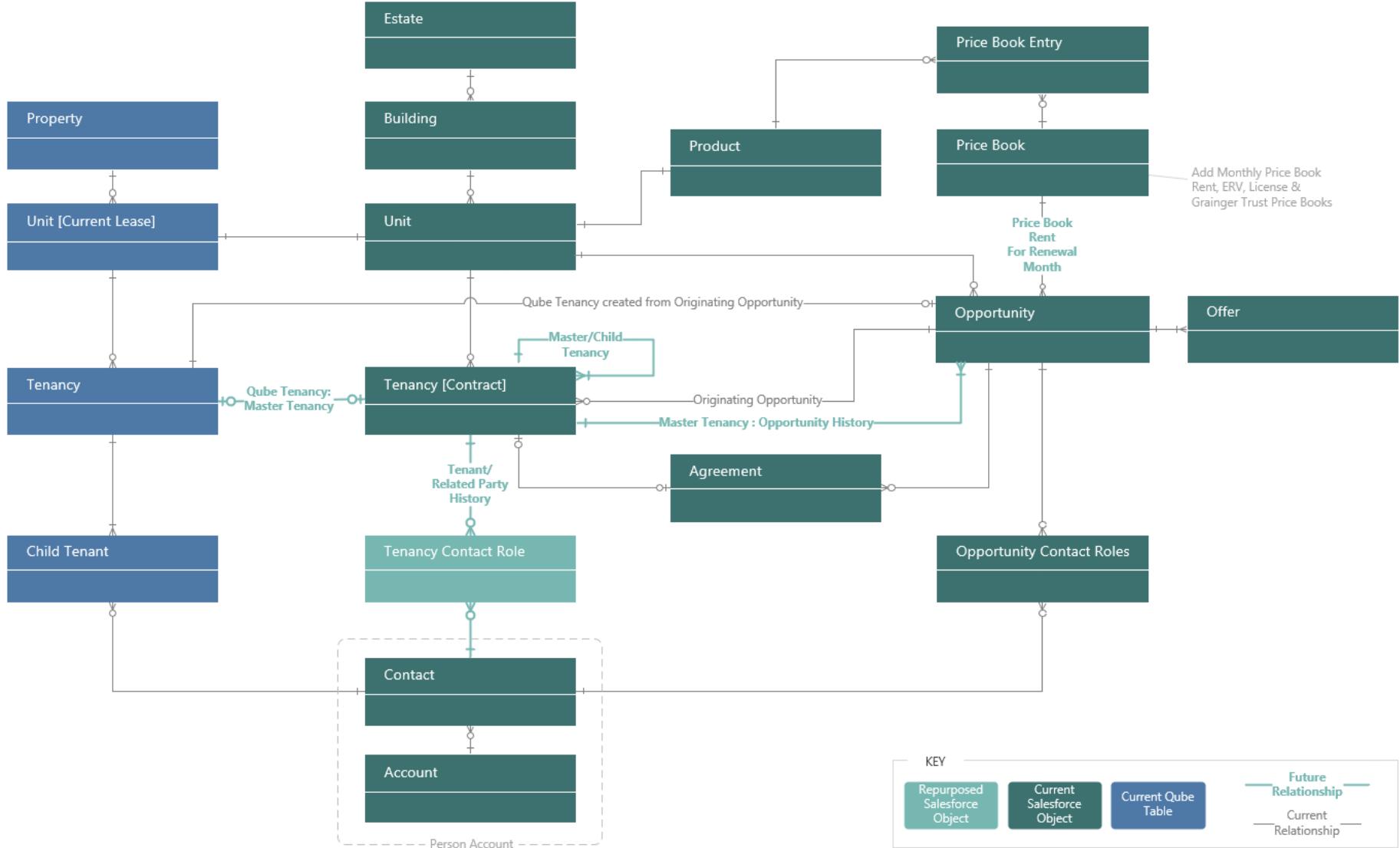


# Solution Features – Release 1



## Create Foundation for a Single View of Customer

Align Qube &  
Salesforce Tenancy  
Data Model

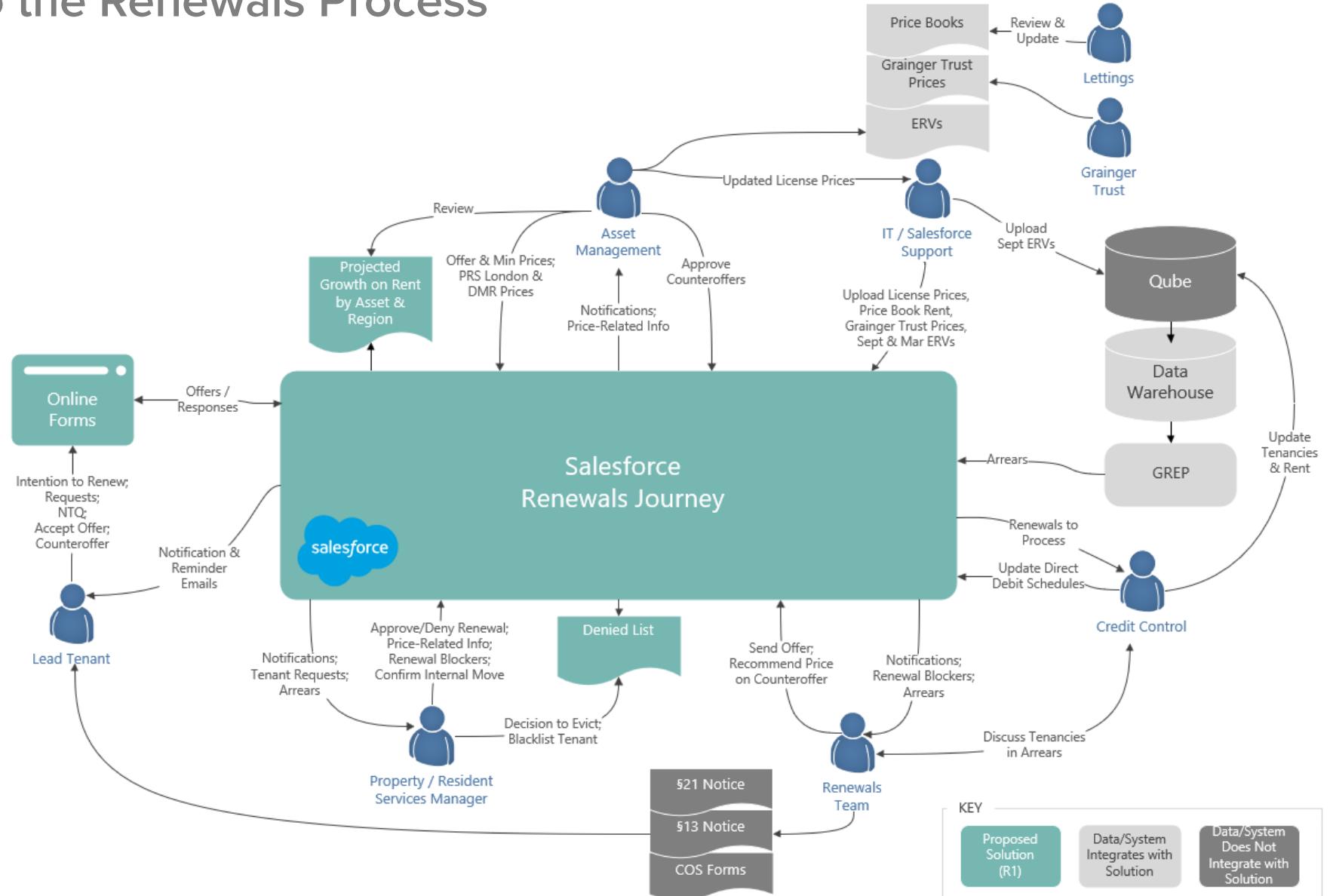


# Solution Features – Release 1



## Prepopulate Inputs to the Renewals Process

- See Current Tenancy Arrears in Salesforce
- Upload ERVs, Price Book Rent, Grainger Trust & License Prices
- Deny a Renewal Mid-Term & Manage Denied List
- Manage Unit Condition & Estate Pricing Factors
- See Projected Growth on Rent by Asset & Region
- Manage Tenant Requests at Renewal & Renewal Blockers



# Solution Features – Release 1



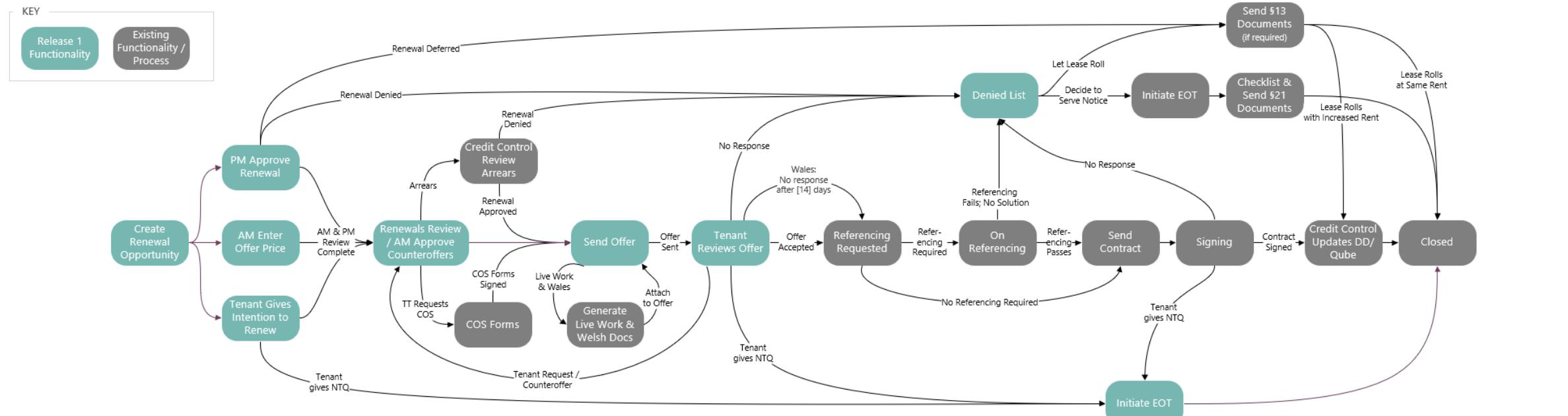
## Replace Spreadsheet & Tenant Portal within the Current Renewals Journey

Automatically Create  
Renewal Opportunities from  
Accurate Tenancy Data

Enable Tenant to give  
Early Intention to  
Vacate or Renew

PMs Approve, Deny,  
or Defer Renewals

AM Update  
Offer & Minimum Prices



Renewals Team Review &  
Send Prepopulated Offers;  
See Full Offer History

Tenants Receive,  
Respond to Offer(s) &  
Counteroffer Online

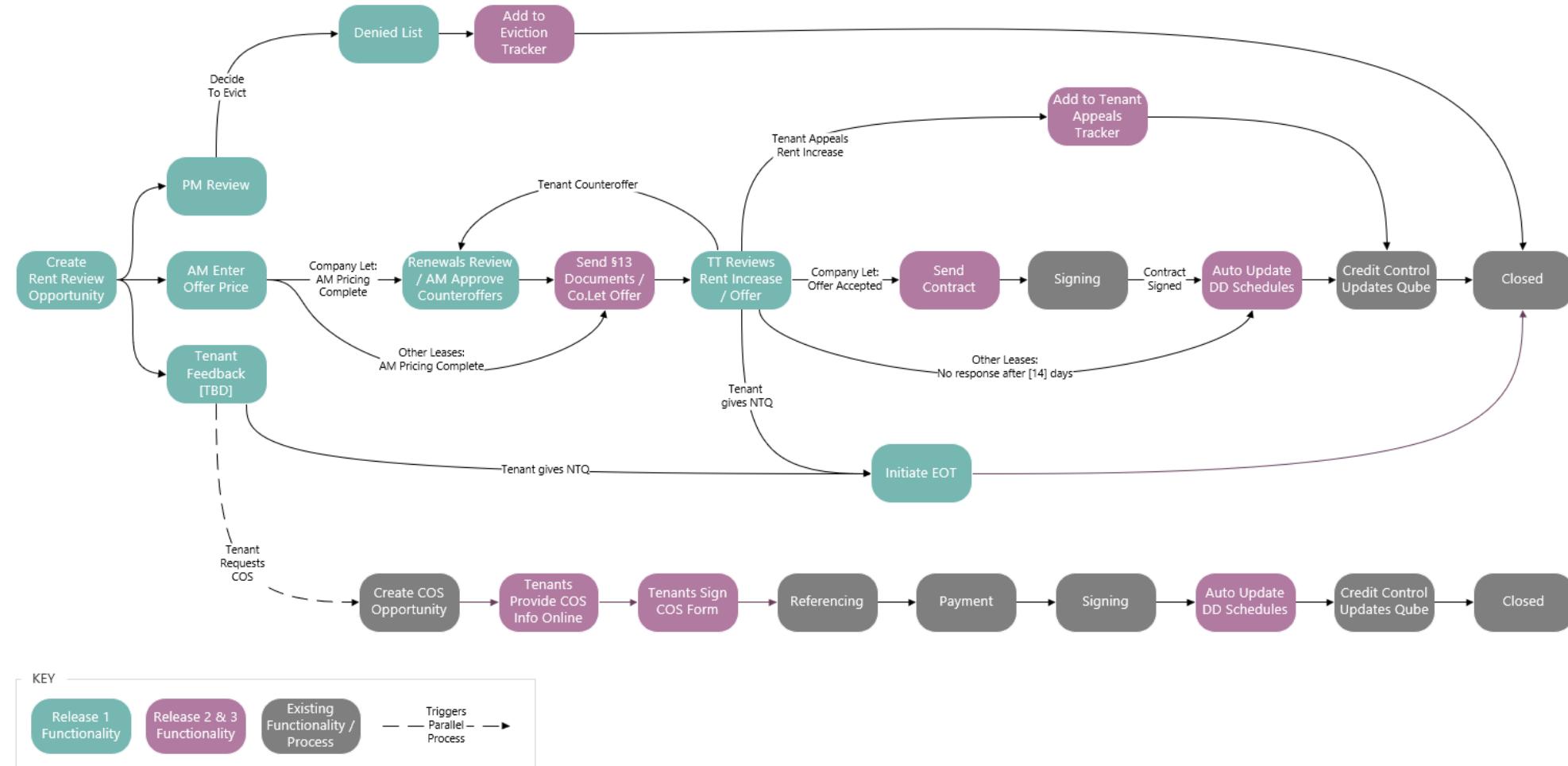
AM Approve  
Counteroffers

Initiate EOT when  
Tenant gives NTQ or  
for Internal Move

# Solution Vision - Post-Renters' Rights Bill



## Build on the Enhanced Renewals Journey



# Proof of Concept



## Storing Price Books in Salesforce

The screenshot displays the Grainger PLC Salesforce environment. At the top, a navigation bar includes links for Home, Renewals Manager, Leads, Accounts, Opportunities, Blocks, Buildings, Units, Reports, and More. A search bar is also present.

The main area shows a report titled "Report: Price Books with Products and Unit Pricebook Pricing by Month". It includes a warning message: "⚠ This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results." Below this, a summary row shows "Maximum Monthly Rent (Default) £8,287.16". The main table lists various units (e.g., 1, Horsforth House; 10, Northampton Grove) along with their address, price book name, and monthly rent values for different price books (2024-01 to 2024-08).

A callout bubble points to the "Price Book Name" column in the report table, stating: "Price Book entries for the renewal month can be used in the renewal process".

An arrow points from the "Unit" field in the report table to a detailed view of a specific unit (1 Alten Hse, Charteris Cl, Hants, GU11 4DX). This view shows a tabular list of "Monthly Pricebook Values (13)" with columns for "Monthly Price Book" and "Monthly Price". The table lists 13 different price books with their corresponding monthly prices.

A callout bubble points to the "View historical & future price book values for a unit" button, stating: "View historical & future price book values for a unit".

A large callout bubble on the right side of the screen states: "Use standard Salesforce Pricebook objects to store price book values, ERVs, Grainger Trust & license prices."

# Proof of Concept



## Tenant Provides Renewal Intention or Responds to Offer via Form Assembly

Tenant clicks on link  
in a system-generated email to  
open a form

### Renewal Offer Form

Personal Details

Name	Phone Number
* Toby Funky	

Current Property

1 Argo Apts, 4 Silvertown Way, London	Tenancy End Date
	01/01/2024

Does this look correct?

Yes  
 No

Renewal Offer Details

Current Rent	Proposed Rent
1150.00	1500.00
Current Terms	Proposed Terms
12 Months	12 Months
Current Break Clause	Proposed Break Clause
No break	No break
Current Payment Periodicity	Proposed Payment Periodicity
Monthly	Monthly

Opportunity & offer  
information is  
sourced real-time

I want to:

Renew with the above terms  
 Make a change  
 I will be moving out

Make a Change

Please let us know what you would like to change

Add or remove a tenant  
 Offer a different rent  
 Change the term that is offered  
 Change the break clause that is offered  
 Change the payment periodicity

Offer different rent

1234
------

Submit

Responses are saved on  
the opportunity, offer or  
create new records

# Proof of Concept



## Replace Renewals Spreadsheet with LWC Data Tables Relevant for each Team

Create tables for each team displaying renewal opportunities & information relevant to them

Conditional  
Formatting

	Asset ...	Estate	Unit [Plot]	Custom Unit [Hover]	AM Review Urgent	Renewal Date	Term Requested by TT	Unit Te...	Septemb er Monthly ERV	March Monthly ERV	Current Monthly Rent	Price Book Rent	Price Book / Current Rent %	Price Book / March ERV %	AM Offering	AM Offering / Current Rent %	AM Offering / March ERV %	AM Minimum
1	Open box	-	Flat 8 Eastwood ...	Flat 8 Eastwood Court, Man	▶	20 Jun 2024	24 Months	Parking Lice...	£785.00	£0.00	785				£5,170.00		£0.00	
2	Hazel Armst...	NE Postco...	South Moor, Nr ...	South Moor, Nr Shilbottle, M	▶	12 May 2024	24 Months	AST	£785.00	£0.00	900				£1,560.00		£0.00	
3	Hazel Armst...	-	Flat 2 Eastwood ...	Flat 2 Eastwood Court, Man	▶	25 Jul 2024	24 Months	AST	£675.00	£0.00	675				£1,222.00		£0.00	
4	Open box	Resi - Fres...	Flat 75, Freshfiel...	Flat 75, Freshfields, Manche	▶	28 Jun 2024	12 Months	Occupation ...	£695.00	£0.00	695				£222.00		£0.00	
5	Simon Aldri...	Berewood ...	Car Park Bay 24,...	Car Park Bay 24, Fielding Hc	▶	1 Aug 2024	24 Months	AST	£0.00	£0.00	0						£0.00	
6	GREP Integr...	Essex	Hillside Cottage,...	Unit Details  Plot No. Car Park Bay 24, Fielding House, Carey Lane, Building Fielding House, 1-9, Carey Lane, PO7 3BH Block Berewood PRS - Fielding House Available Date 06/09/2023 Bathrooms				AST	£0.00	£0.00	977.17						£0.00	
7	GREP Integr...	Essex	Hillside Cottage,...					AST	£0.00	£0.00	977.17						£0.00	
8	GREP Integr...	Essex	Hillside Cottage,...					AST	£80.50	£0.00	977.17						£0.00	
9	Open box	Resi - Salf...	Flat 41, Agate M...					AST	£0.00	£0.00	870						£0.00	
10	Open box	Resi - Salf...	Flat 41, Agate M...					AST	£0.00	£0.00	870						£0.00	
11	Open box	Resi - Fres...	Flat 29, Freshfiel...					AST	£545.00	£0.00	545						£0.00	
12	Saji Gunasek...	/undefined						AST	£0.00	£0.00							£0.00	
13	GREP Integr...	Argo - Apa...	78 Argo Apts, 4 ...					AST	£0.00	£0.00	1725						£0.00	
14	Open box	Twickenham	G9, Cavendish H...					AST	£80.50	£0.00	80.5						£0.00	
15	Open box	-	Flat 3 Eastwood ...					AST	£720.00	£0.00	720						£0.00	

View information about the opportunity or related objects in a hover over

Cancel

Save

Information can be sourced from related objects e.g., latest price book rent for the renewal month

# Proof of Concept



## Replace Renewals Spreadsheet with LWC Data Tables Relevant for each Team

	Asset ...	Estate	Unit [Plot]	Custom Unit [...]	AM Review Urgent	Renewal Date	Term Requested by TT	Unit Te...	Septemb er Monthly ERV	March Monthly ERV	Current Monthly Rent	Price Book Rent	Price Book / Current Rent %	Price Book / March ERV %	AM Offering	AM Offering / Current Rent %	AM Offering / March ERV %	AM Minimum
1	<input type="checkbox"/> Open box	-	Flat 8 Eastwood ...	Flat 8 Eastwood Cou	<span style="background-color: red;">P</span>	20 Jun 2024	24 Months	Parking Lice...	£785.00	£0.00	785			£5,550.00			£0.00	
2	<input type="checkbox"/> Hazel Armst...	NE Postcodes	South Moor, Nr ...	South Moor, Nr Shilbottle, M...	<span style="background-color: red;">P</span>	12 May 2024	24 Months	AST	£785.00	£0.00	900			£1,550.00			£0.00	
3	<input type="checkbox"/> Hazel Armst...	-	Flat 2 Eastwood ...	Flat 2 Eastwood Court, Man...	<span style="background-color: red;">P</span>	25 Jul 2024	24 Months	AST	£675.00	£0.00	675			£2,500.00			£0.00	
4	<input checked="" type="checkbox"/> Open box	Resi - Freshfield...	Flat 75, Freshfiel...	Flat 75, Freshfields, M...	<span style="background-color: red;">P</span>	28 Jun 2024	12 Months	Occupation ...	£695.00	£0.00	695			2150			£0.00	
5	<input checked="" type="checkbox"/> Simon Aldri...	Berewood PRS...	Car Park Bay 24, ...	Car Park Bay 24, Field ...	<span style="background-color: red;">P</span>	1 Aug 2024	24 Months	AST	£0.00	£0.00	0			<input checked="" type="checkbox"/> Update 3 selected items			£0.00	
6	<input checked="" type="checkbox"/> GREP Integr...	Essex	Hillside Cottage, ...	Hillside Cottage, Wic...				AST	£0.00	£0.00	977.17				<input type="button" value="Cancel"/>	<input type="button" value="Apply"/>	£0.00	
7	<input type="checkbox"/> GREP Integr...	Essex	Hillside Cottage, ...	Hillside Cottage, Wic...				AST	£0.00	£0.00	977.17						£0.00	
8	<input type="checkbox"/> GREP Integr...	Essex	Hillside Cottage, ...	Hillside Cottage, Wic...	<span style="background-color: red;">P</span>	7 Jun 2024	24 Months	AST	£80.50	£0.00	977.17						£0.00	
9	<input type="checkbox"/> Open box	Resi - Salford	Flat 41, Agate M...	Flat 41, Agate Mews, ...				AST	£0.00	£0.00	870						£0.00	
10	<input type="checkbox"/> Open box	Resi - Salford	Flat 41, Agate M...	Flat 41, Agate Mews, ...				AST	£0.00	£0.00	870						£0.00	

Users can make bulk updates

Additional functionality available:

- Filters
- Calculated fields
- Action buttons

Values that fail validation are highlighted

		Plot	Custom Unit [Hover]	AM Review Urgent	Renewal Date	Term Requested by TT	Unit Te...	Septemb er Monthly ERV	March Monthly ERV	Current Monthly Rent	Price Book Rent	Price Book / Current Rent %	Price Book / March ERV %	AM Offering	AM Offering / Current Rent %	AM Offering / March ERV %	AM Minimum
1	<span style="color: red;">!</span> We found errors.	<span style="background-color: red;">P</span>	Custom Unit [Hover]	<span style="background-color: red;">Urgent</span>	Renewal Date	Term Requested by TT	Unit Te...	Septemb er Monthly ERV	March Monthly ERV	Current Monthly Rent	Price Book Rent	Price Book / Current Rent %	Price Book / March ERV %	AM Offering	AM Offering / Current Rent %	AM Offering / March ERV %	AM Minimum
2	<span style="color: red;">!</span> 2	<input checked="" type="checkbox"/> Hazel Armst...	NE Postco...	South Moor, Nr ...	South Moor, Nr Shilbottle, M...	<span style="background-color: red;">P</span>	12 May 2024	24 Months	AST	£785.00	£0.00	900		£99.00			£0.00
3	<span style="color: red;">!</span> 3	<input checked="" type="checkbox"/> Hazel Armst...	-	Flat 2 Eastwood ...	Flat 2 Eastwood Court, Man...	<span style="background-color: red;">P</span>	25 Jul 2024	24 Months	AST	£675.00	£0.00	675		£99.00			£0.00

# Proof of Concept



## Renewals Manager Consolidates Team Lists & Dashboards

The screenshot displays a single dashboard integrated with various management tools. At the top, a navigation bar includes links for Grainger PLC, Home, Renewals Manager, Leads, Accounts, Contacts, Opportunities, Blocks, Buildings, Units, Messaging Sessions, Tasks, Notes, Reports, Dashboards, and More. A search bar and a toolbar with icons for star, plus, question mark, settings, and user profile are also present.

The main area is divided into two main sections:

- Left Section (Renewals Manager):** This section contains a table titled "Renewals Dashboard" showing asset renewals. The columns include Asset Manager, Estate, Unit [Plot], Custom Unit [Hover], AM Review Urgent, Renewal Date, Term Requested by TT, Unit Tenure, September Monthly ERV, March Monthly ERV, Current Monthly Rent, Price Book Rent, Price Book / Current Rent %, Price Book / March ERV %, AM Offering, and AM Offering / Current Rent %. A tooltip "Display lists for each team" points to the Unit [Plot] column.
- Right Section (Reports):** This section features a "All Leads Last FY" report with a bar chart showing Record Count (5 in May 2024, 1 in June 2024, 2 in August 2024, 6 in September 2024) against Create Date. Below the chart is a "View Report" button and a timestamp "As of Today at 08:30". Other reports visible include the "Negotiator Dashboard" (Dashboard for all Negotiators, dynamic, As of 30 Oct 2024, 08:31-Viewing as Sam Duncan-Change), "Leaderboard", "Open Opportunities", "National Offers Out", and "My Calls This Year". A tooltip "Display new Projected Growth on Rent report as well as existing dashboards used by Asset Management on a single screen" points to the right side of the dashboard.

# Proposed Roadmap



## Release 1

- Denied List
- Tenant Gives Early Intention to Renew
- PMs Approve, Deny, Defer Renewals
- Manage Renewal Requests & Blockers
- View Unit Condition & Estate Pricing Factors
- Upload ERVs, Price Book Rent, Grainger Trust & License Prices
- AM Update Offer & Minimum Price
- Projected Growth on Rent Report
- View Tenancy Arrears
- Tenants Respond to Offers Online
- AM Approve Counteroffers
- Initiate EOT at NTQ or Internal Move
- Align Qube & SF Tenancy Data Model

## Release 2

Post Renters' Rights Bill

- Generate §13 Notification of Rent Increase
- Rent Appeals Tracker
- Eviction Tracker
- Customise Renewals for Wales, Company Lets, Live/Work, DMR & Grainger Trust
- AM Dashboard: Comparable Rent & Performance by Estate
- PM/RSM Visibility into Rent Increases

## Release 3

- Omni-Channel Communications & WhatsApp Integration
- Online Change of Sharer Forms
- Update Direct Debit Payment Schedules
- Bulk Negotiation for Company Lets

## Future

- Manage Price Book Rent in Salesforce
- Single View of Tenancy Incidents, Complaints, Grumbles & Survey Feedback
- Update Tenancy & Rent in Qube on Renewal

2024

15 Nov

2025

Early May

# Feature Backlog



## 18 Features Addressed in Release 1 & 21 Remaining Features/Projects

Projects / Customer Journey - Renewals Project

### Backlog

Search    N    Epic    Label 1    Clear filters

Backlog (18 of 39 issues visible)    130 0 0 Create sprint

Issue	Description	Status	Priority	Assignee
CJR-23	Create Master Tenancy that maps to a Qube Tenancy	To Do	21	
CJR-22	Denied List	To Do	8	
CJR-24	Create Renewal Opportunities	To Do	13	
CJR-25	Tenants Provide Intention to Renew	To Do	5	
CJR-34	See Current Tenancy Arrears	To Do	3	
CJR-26	PMs Approve Renewals	To Do	21	
CJR-27	Track Tenant Requests & Renewal Blockers	To Do	3	
CJR-30	Upload Price Book Rent, Grainger Trust & License Prices	To Do	5	
CJR-31	Upload ERVs into Salesforce	To Do	3	
CJR-32	AM Update Offer & Minimum Price	To Do	13	
CJR-33	Dashboard: Growth on Rent based on Projected Renewal Price	To Do	5	
CJR-35	Renewals Team Validate Renewal before Offering	To Do	5	
CJR-36	Tenant Receives & Responds to Offer	To Do	8	
CJR-37	Manage Counteroffers & AM Approval	To Do	5	
CJR-38	Initiate EOT on NTQ or Internal Moves	To Do	5	
CJR-28	Manage & View Unit Condition	To Do	2	
CJR-29	Manage & View Block-Level Factors Impacting Pricing & Residents	To Do	2	
CJR-39	Manage Deferred or Denied Renewals	To Do	3	

Add epic / CJR-33

### Dashboard: Growth on Rent based on Projected Renewal Price

+ Add    Apps

**Description**  
As an Asset Manager, I want to see anticipated growth on rent for each month's renewal opportunities, so that I can ensure that rental growth is in line with KPIs before finalizing renewal prices.

**Acceptance Criteria:**

- AM can see the following by estate & by portfolio:
  - Rental growth on ERV
  - Rental growth on Passing/Current Rent
- Rent is based on the minimum price for expected renewals where the offer is not yet accepted, and the accepted offer price once the offer is accepted.
  - Rent should incorporate any revisions to the minimum price made during the counteroffer process.
- AM can look at the dashboard for a prior month which would display the rental growth based on the actual renewal rent achieved (i.e. based on the accepted offers).

**Proposed Implementation Approach:**

- New dashboard
- Note estate is saved on unit.Portfolio\_c

**Exclusions:**

- Comparing the above rental growth to KPIs.

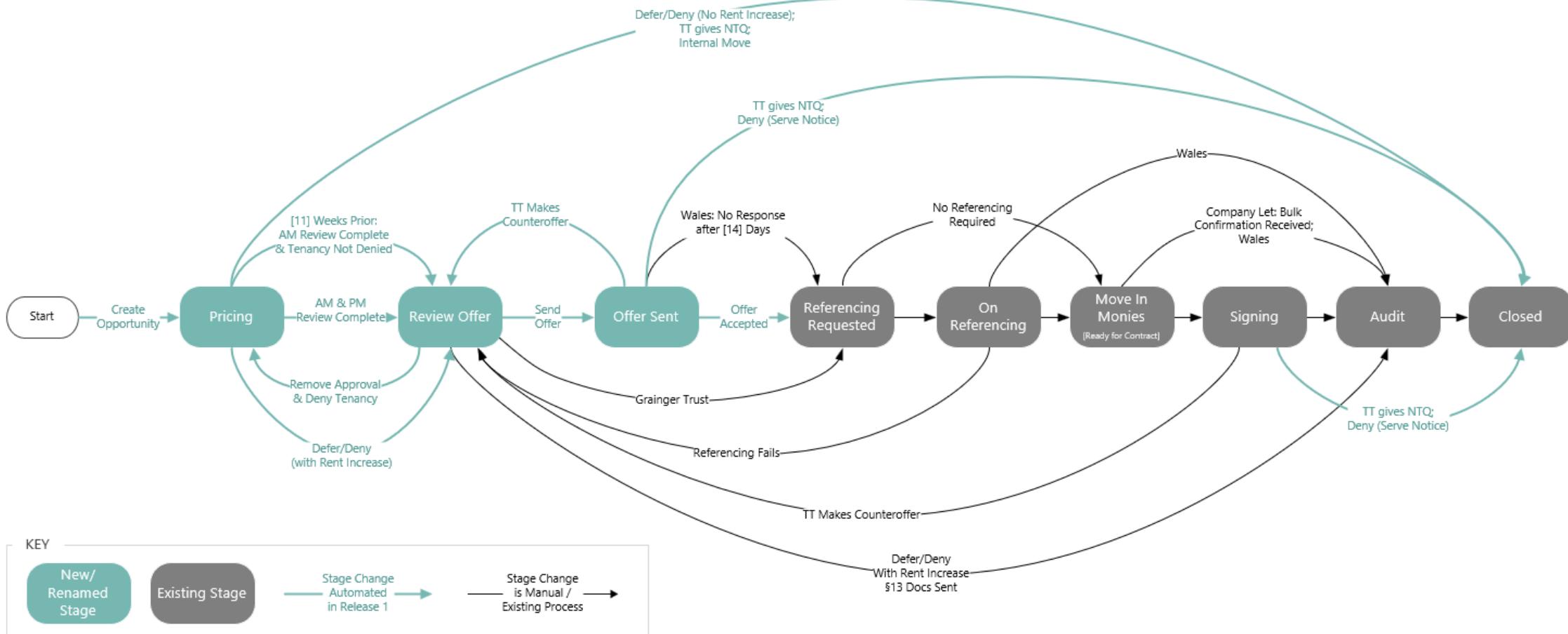
N Add a comment...

<input type="checkbox"/> CJR-13 Ensure Audit Stage is not Skipped for a Renewal
<input type="checkbox"/> CJR-14 Display Additional Info on an Opportunity for Credit Control
<input type="checkbox"/> CJR-10 Differentiate Mid-Term COS from Renewal Opportunities
<input type="checkbox"/> CJR-21 Replace Offers with Notification of Rent Increase [Post Renters' Rights Bill]
<input type="checkbox"/> CJR-20 Customise the Renewals Journey for Wales
<input type="checkbox"/> CJR-16 Customise the Renewal Journey for DMR & Grainger Trust
<input type="checkbox"/> CJR-17 Customise the Renewal Journey for Live/Work
<input type="checkbox"/> CJR-18 Customise the Renewal Journey for Company Lets
<input type="checkbox"/> CJR-9 Dashboard: Comparable Rent & Current Performance by Estate
<input type="checkbox"/> CJR-15 PM has Visibility into Upcoming Rent Increases
<input type="checkbox"/> CJR-19 Remove Tenancy Payment Schedules on Renewal Opportunity
<input type="checkbox"/> CJR-12 Eviction Tracker
<input type="checkbox"/> CJR-11 Rent Increase Appeals Tracker
<input type="checkbox"/> CJR-5 Tenants Complete & Sign COS Forms Online
<input type="checkbox"/> CJR-7 Import Passing Rent from Qube
<input type="checkbox"/> CJR-8 Omni-Channel Communications & WhatsApp Integration
<input type="checkbox"/> CJR-6 Update Direct Debit Payment Schedules on Renewal & COS
<input type="checkbox"/> CJR-2 Update Tenancy & Rent Charges in Qube
<input type="checkbox"/> CJR-4 Bulk Negotiation for Company Lets
<input type="checkbox"/> CJR-3 Visibility into Tenant Incidents, Complaints, Grumbles & Survey Feedback
<input type="checkbox"/> CJR-1 Manage & Calculate Price Book Rent

# Proposed Renewal Opportunity Stages



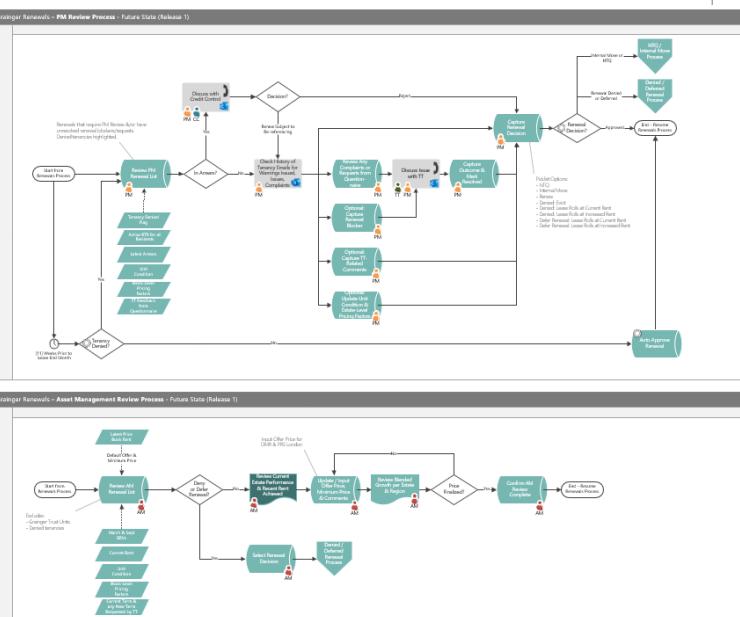
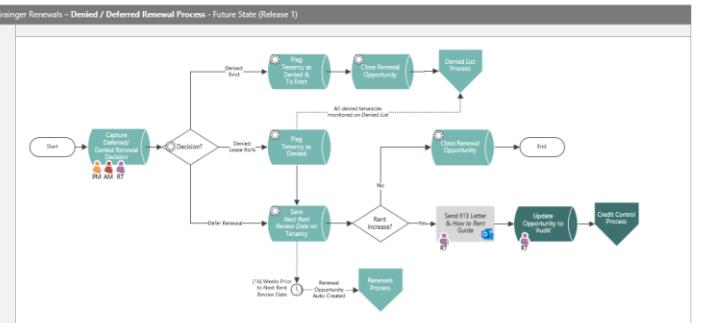
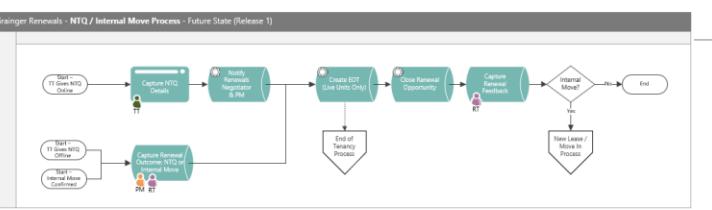
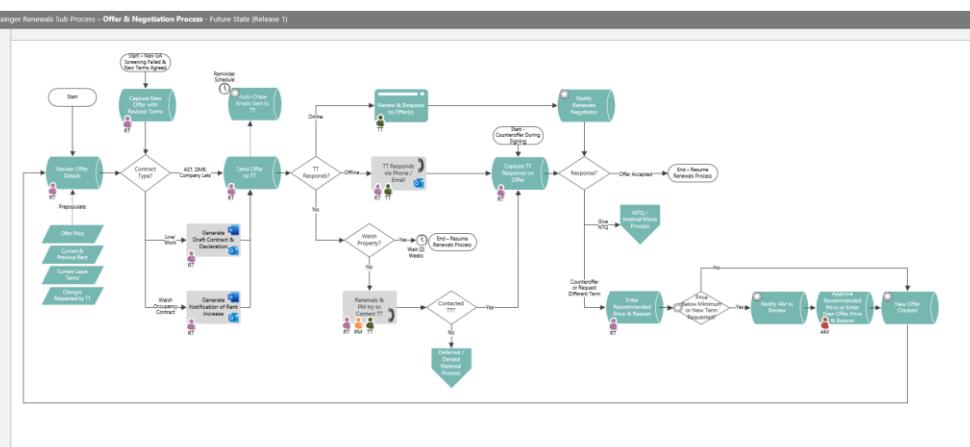
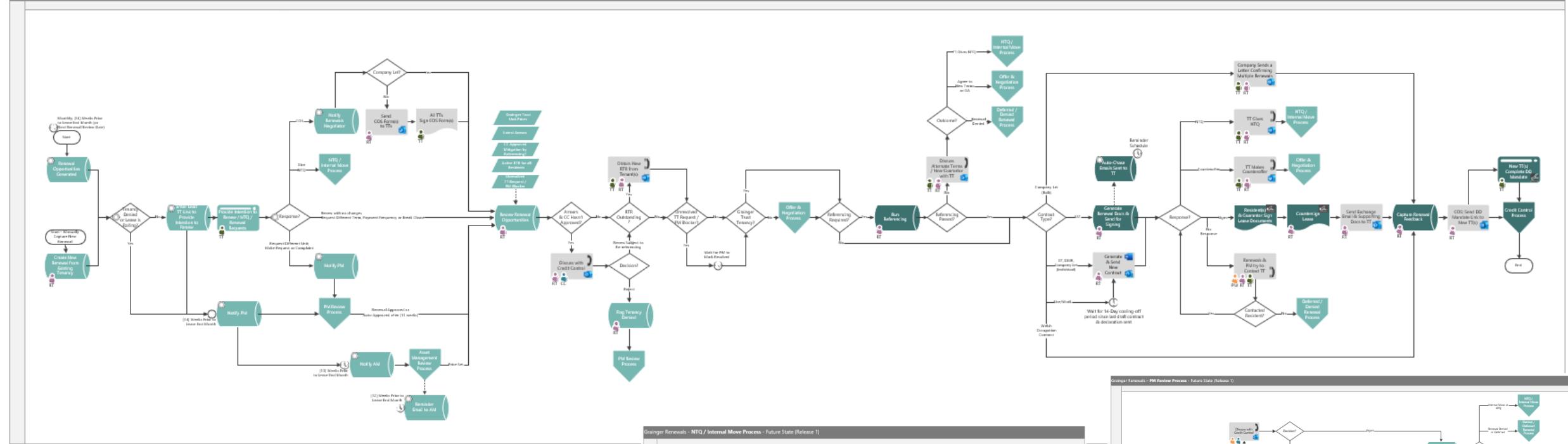
## Reimagining the Renewal Journey Up Until Offer Acceptance



# Proposed Future-State Process



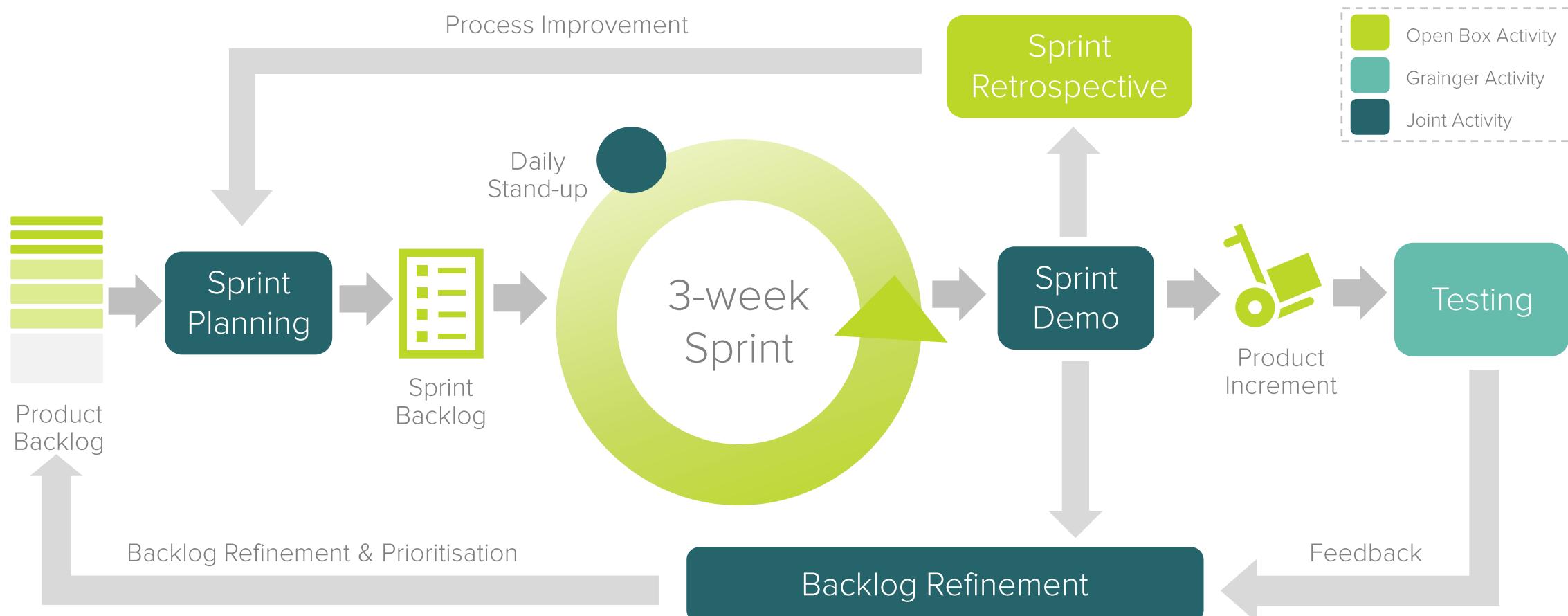
Grainger - Renewals Process - Future State (Release 1)



# Agile Delivery Approach



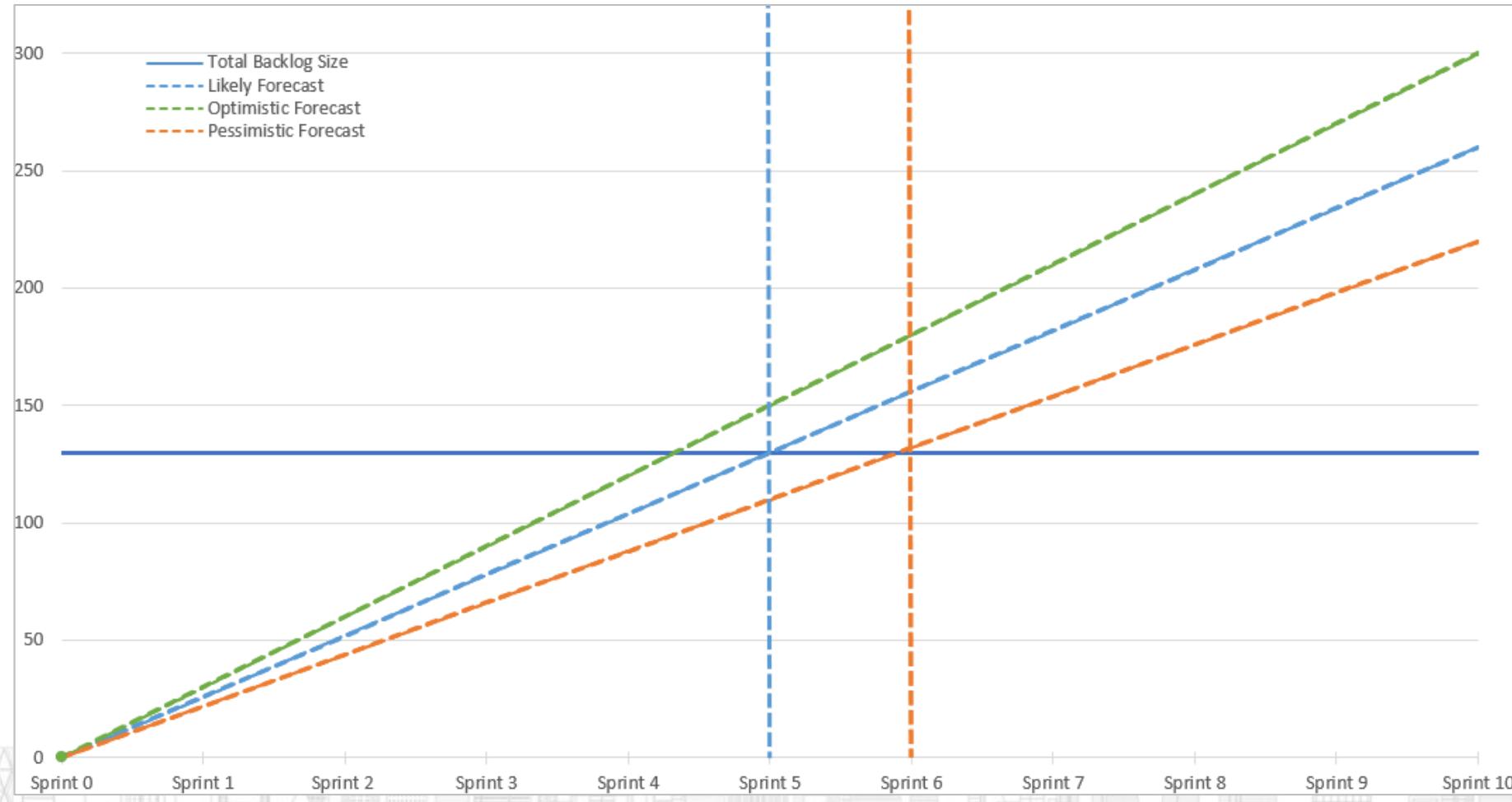
Iterative delivery is achieved through a series of 3-week sprints



# Release 1 Forecast



Likely: 5 – 6 sprints



# Project Team & Forecasted Costs



## OPEN BOX DELIVERY TEAM



Salesforce Architect  
Business Analyst  
Developers  
Quality Assurance  
Project Manager

## GRAINGER DELIVERY TEAM



Product Owner  
- Main point of contact  
  
Subject Matter Experts  
Project Sponsor  
- Involved in Demos & UAT  
  
Change Management &  
End User Training Specialist

## 1 Sprint



420

hours



3

weeks



£40 950

cost

## Release 1



5-6 sprints

effort



5½-6 months

duration



£222 795 –  
£259 650

total cost

# Dependencies



- Grainger to add daily integration to **import tenancy arrears** from the data warehouse or Qube into Salesforce.
  - Note imports from Qube would be additionally dependent on MRI enhancing the Qube web service.
- Functionality to identify **DMR** and **affordable rent** units in Salesforce (currently in scope for the Grainger Trust project).



# Next Steps



- Open Box to deliver a detailed Proposal Document to deliver the first release of Renewals enhancements.
- Grainger to sign the proposal to move forward.





Thank You

