openbox

Grainger

Void Management

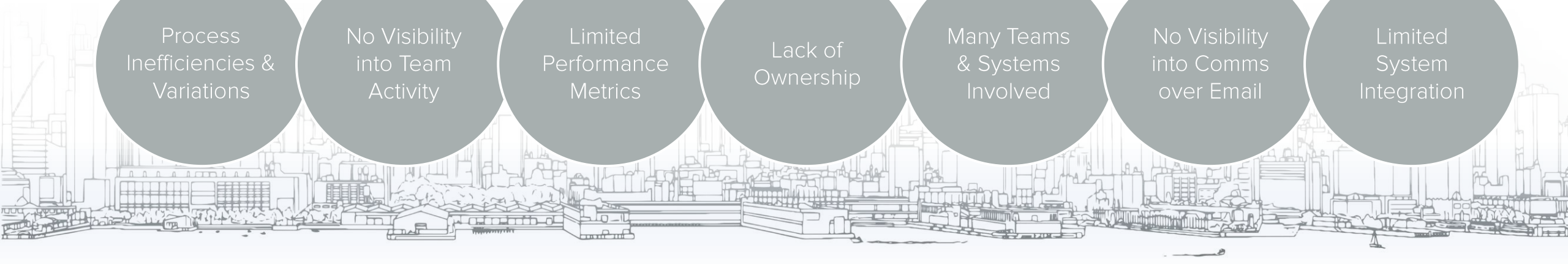
Overview

As part of the larger Connect platform, Grainger PLC has successfully implemented Salesforce to manage the Lead-to-Lease process. This has transformed both internal operations and the customer journey. Grainger PLC are now looking to leverage Salesforce to realise similar benefits for the Void Management process.

Grainger PLC have engaged with Open Box to design a future-state Void Management process that can be implemented in their existing Salesforce org and aligns with Salesforce features and best practices.

Current Challenges with the Void Process:

- Process Inefficiencies & Variations
- No Visibility into Team Activity
- Limited Performance Metrics
- Lack of Ownership
- Many Teams & Systems Involved
- No Visibility into Comms over Email
- Limited System Integration

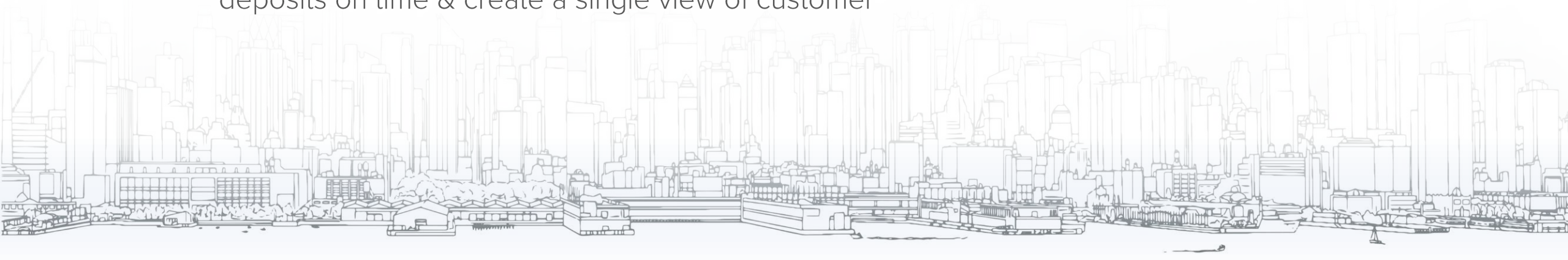


Business Drivers

- Grainger are planning on significant expansion, looking double their number of letting homes in the next 3-4 years.

- The current systems and processes used in void management are not scalable to support this.

- Leveraging the existing Salesforce platform and user licenses will help to:
  - Improve speed & efficiency
  - Reduce errors
  - Allow the business to scale operations without necessitating a linear increase in employee headcount
  - Minimize the time that units remain vacant
  - Improve customer satisfaction - reduce the risk of not cancelling direct debits or returning deposits on time & create a single view of customer



Vision and Objectives

Project Vision :

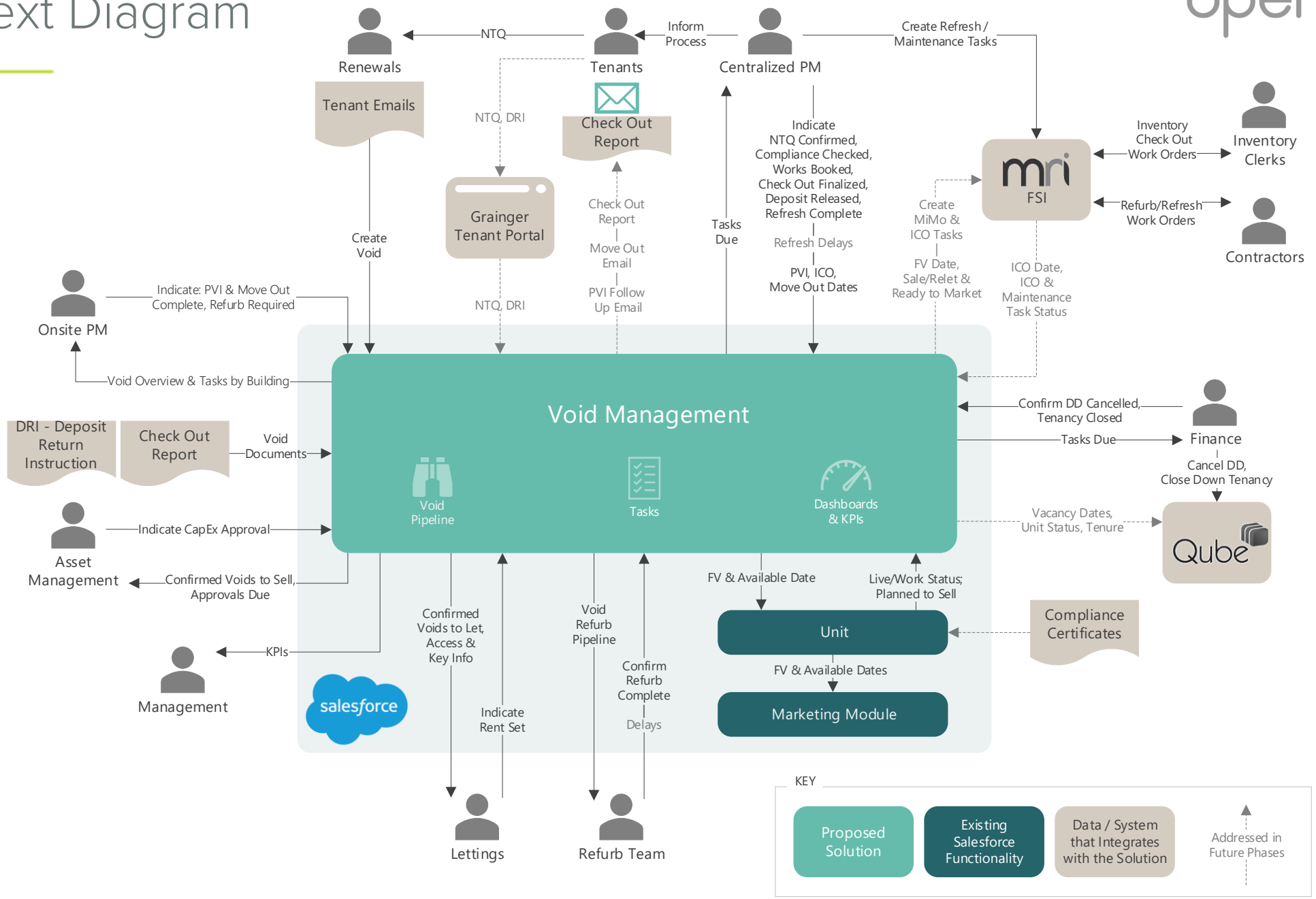
A centralized, standardized void workflow that tracks the end-to-end void progress, minimizes delays, and provides visibility into upcoming work, expected timelines & responsibilities.

The solution will be delivered in increments, providing tangible business value on a regular basis.

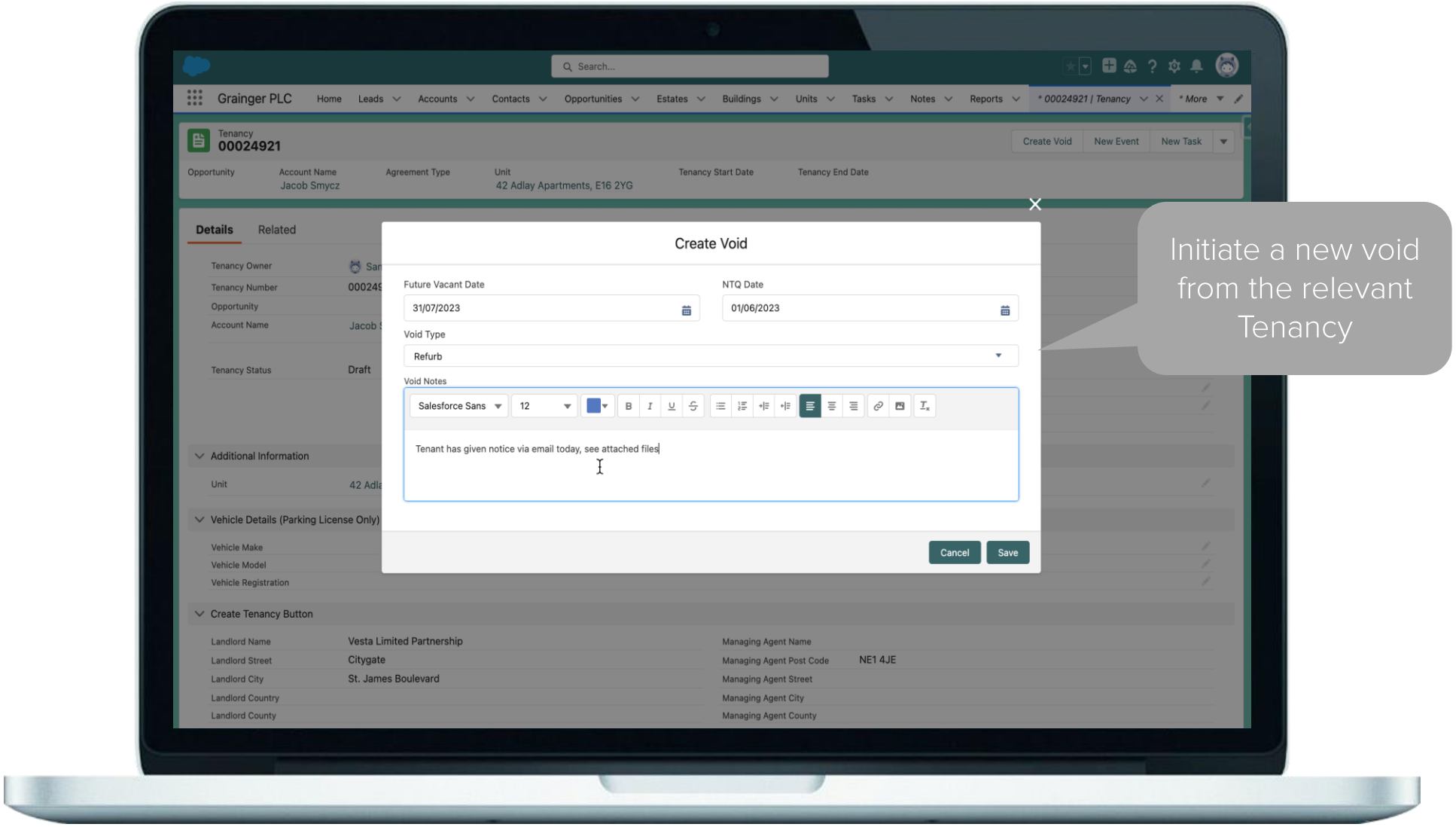
Key Objectives :

- Measure Targets, Timeframes & KPIs
- Visibility into Progress, Delays & Forecasted Completion
- Visibility into Team Workload
- Clear Responsibility
- Standardise Process while Allowing for Flexibility
- Automate Notifications to Internal Teams
- Move Towards Single View of Customer & Property

Context Diagram

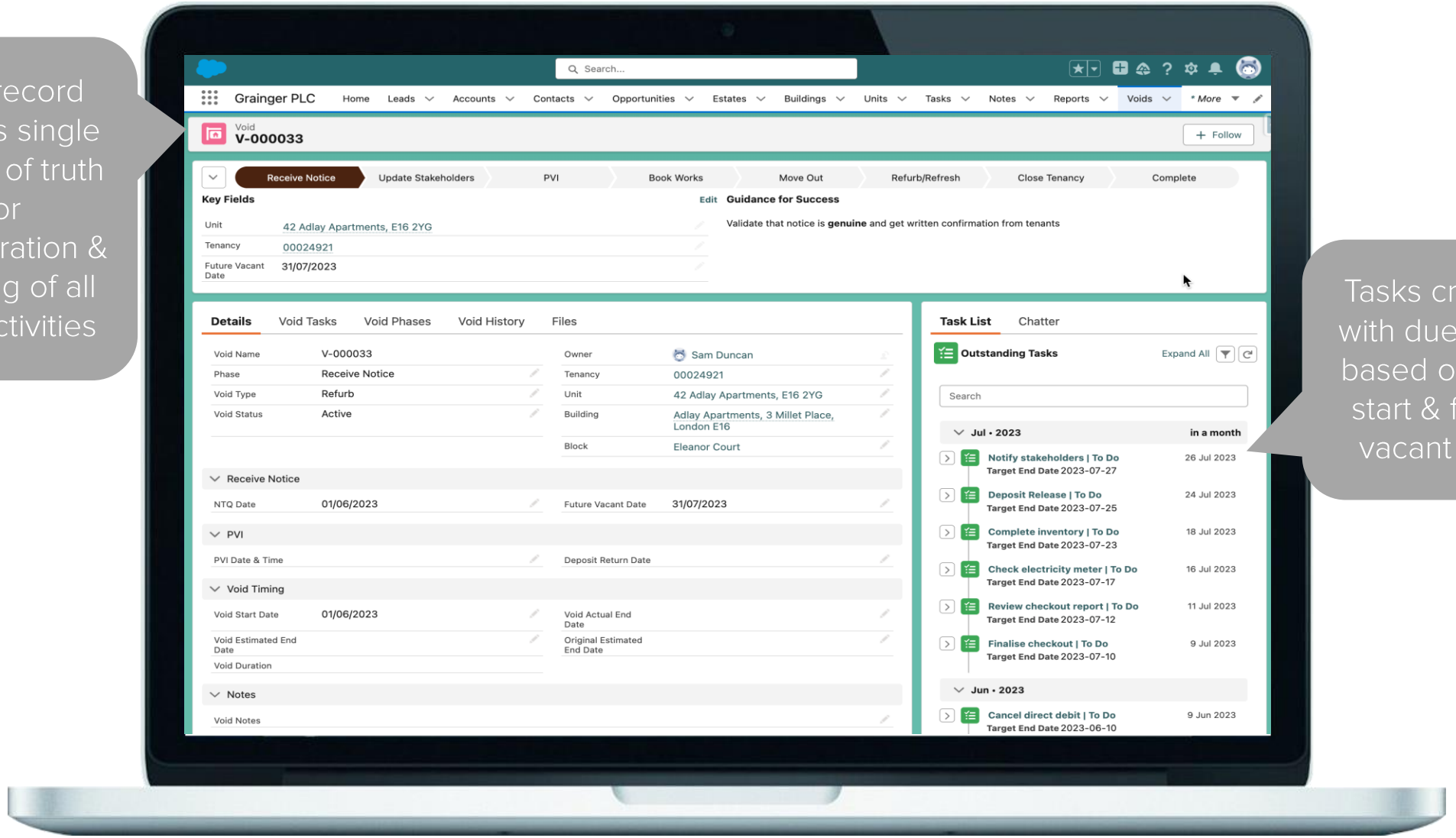


Proof of Concept



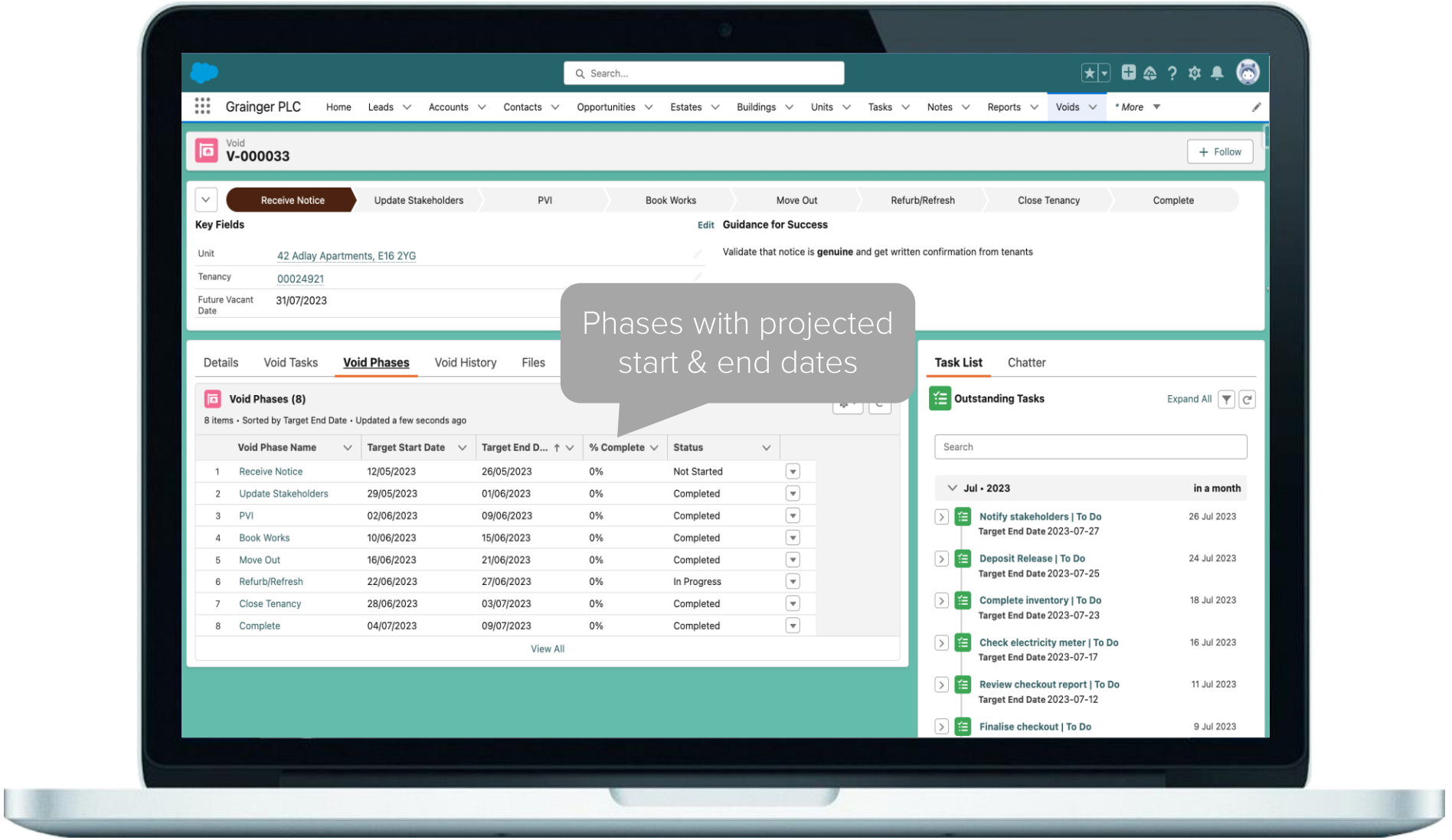
Proof of Concept

Void record creates single source of truth for collaboration & tracking of all void activities

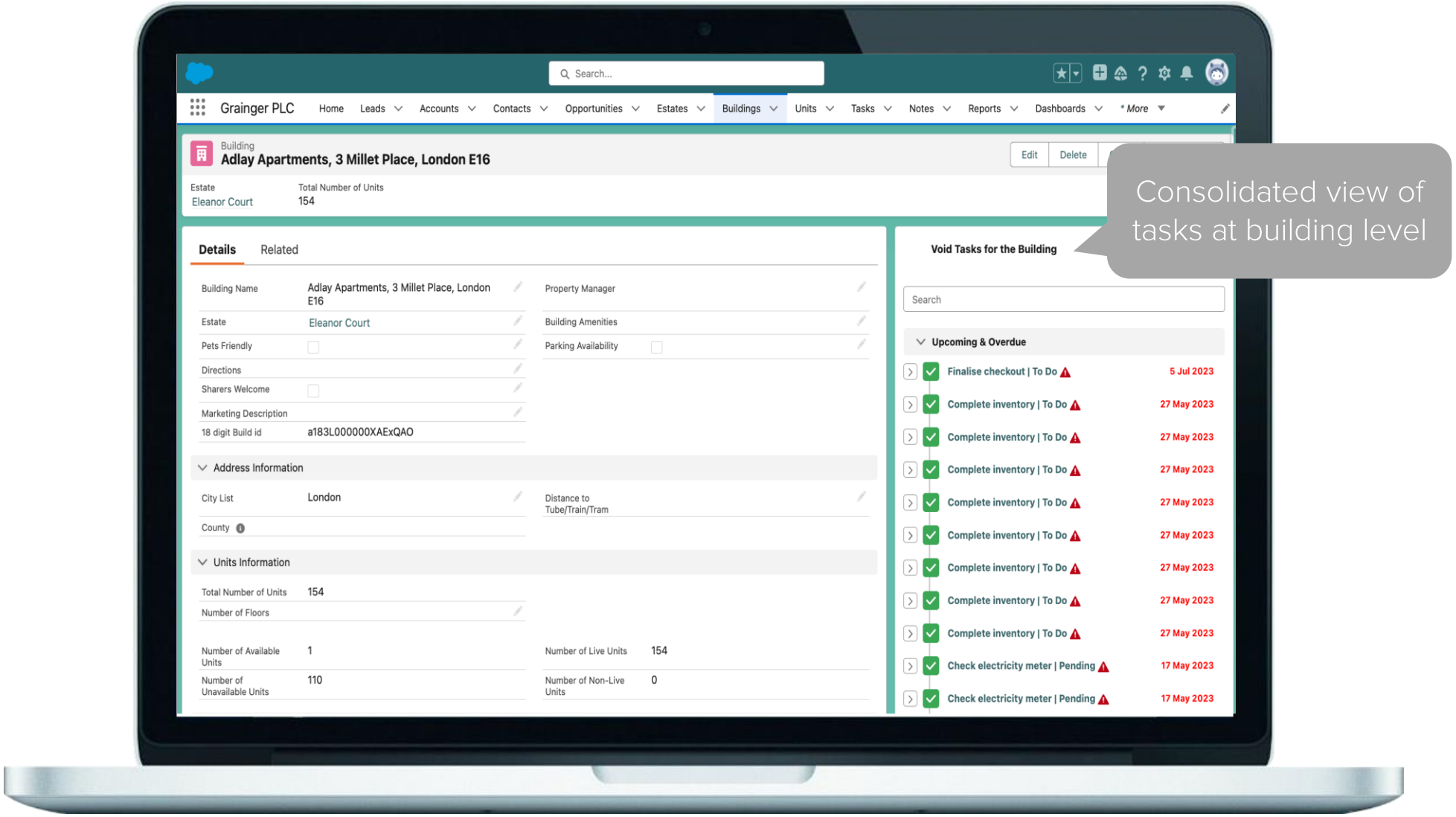


Tasks created with due dates based on void start & future vacant date

Proof of Concept

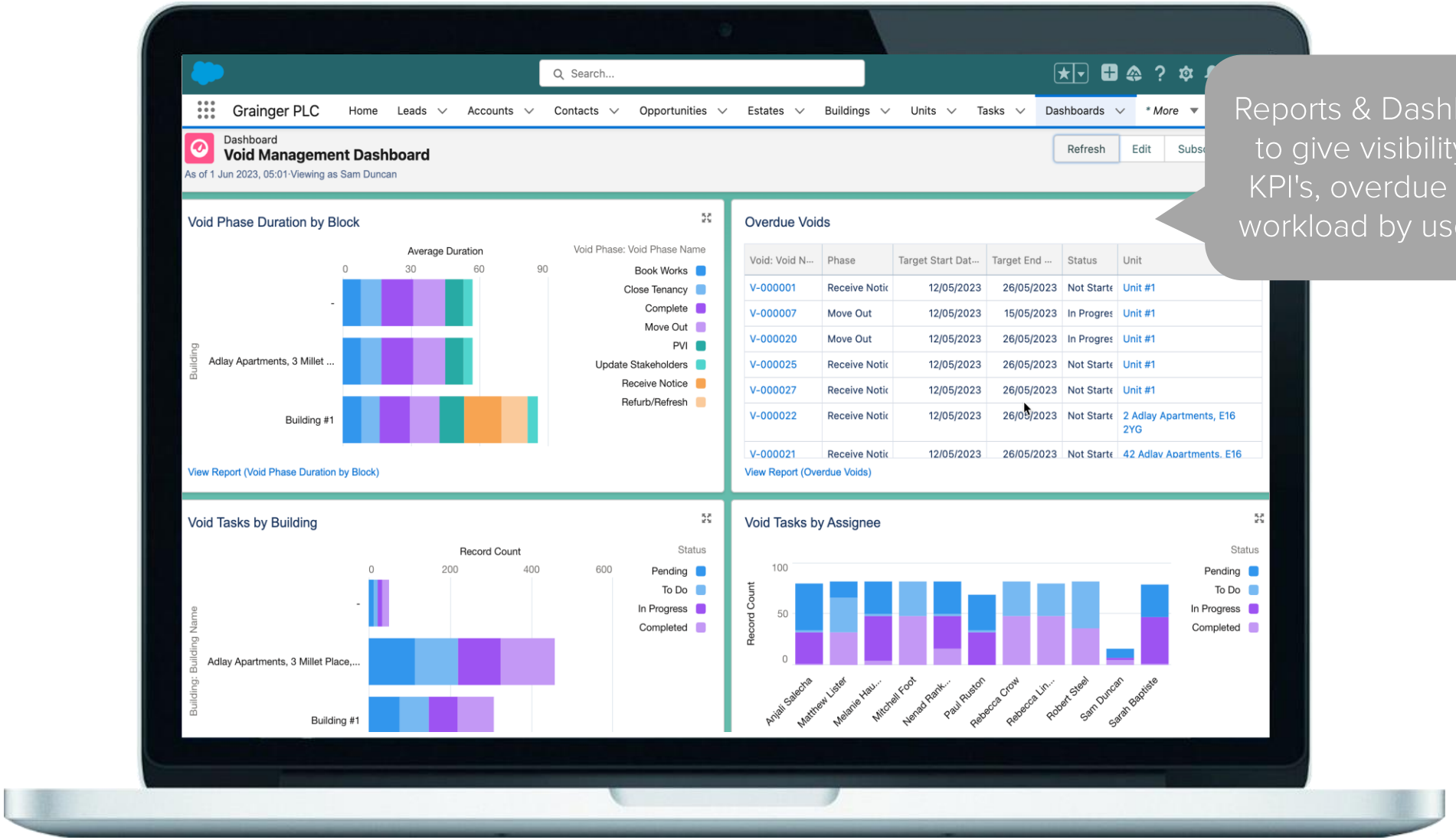


Proof of Concept



Consolidated view of tasks at building level

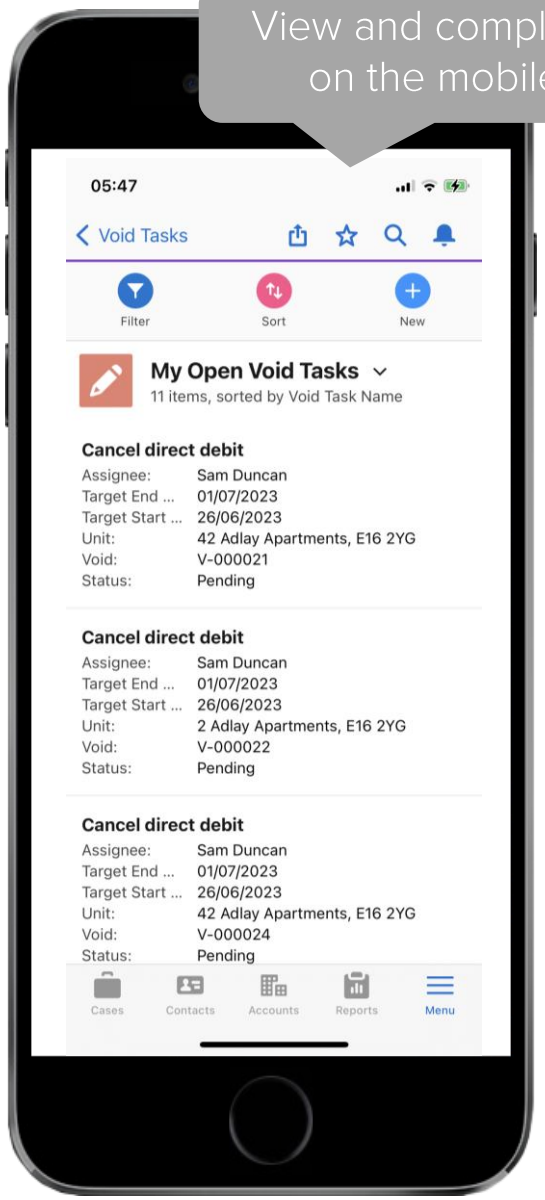
Proof of Concept



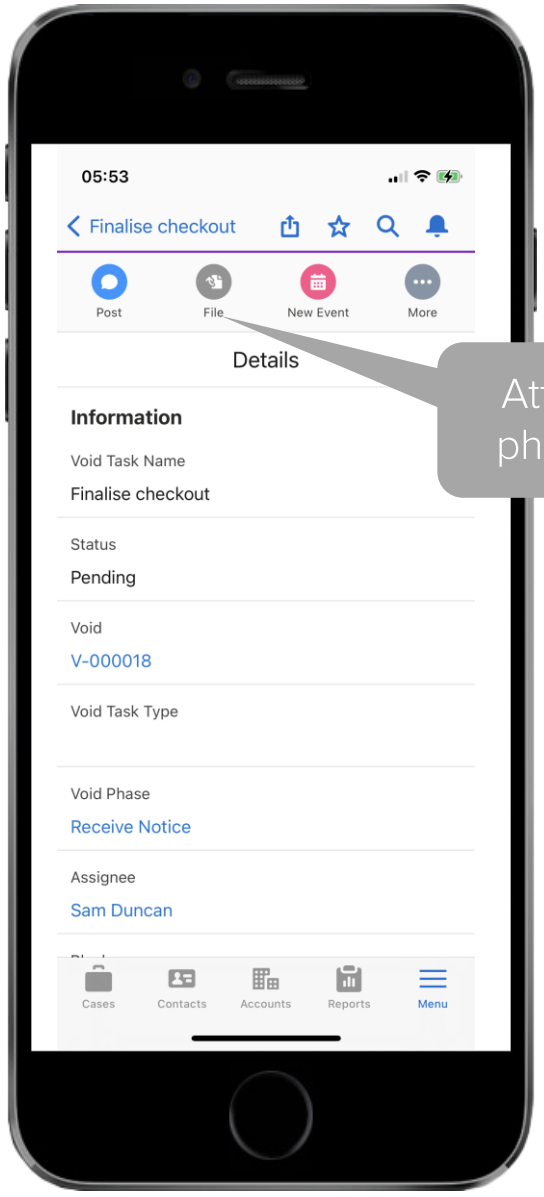
Reports & Dashboards to give visibility into KPI's, overdue tasks, workload by user, etc.

Proof of Concept

View and complete tasks on the mobile app

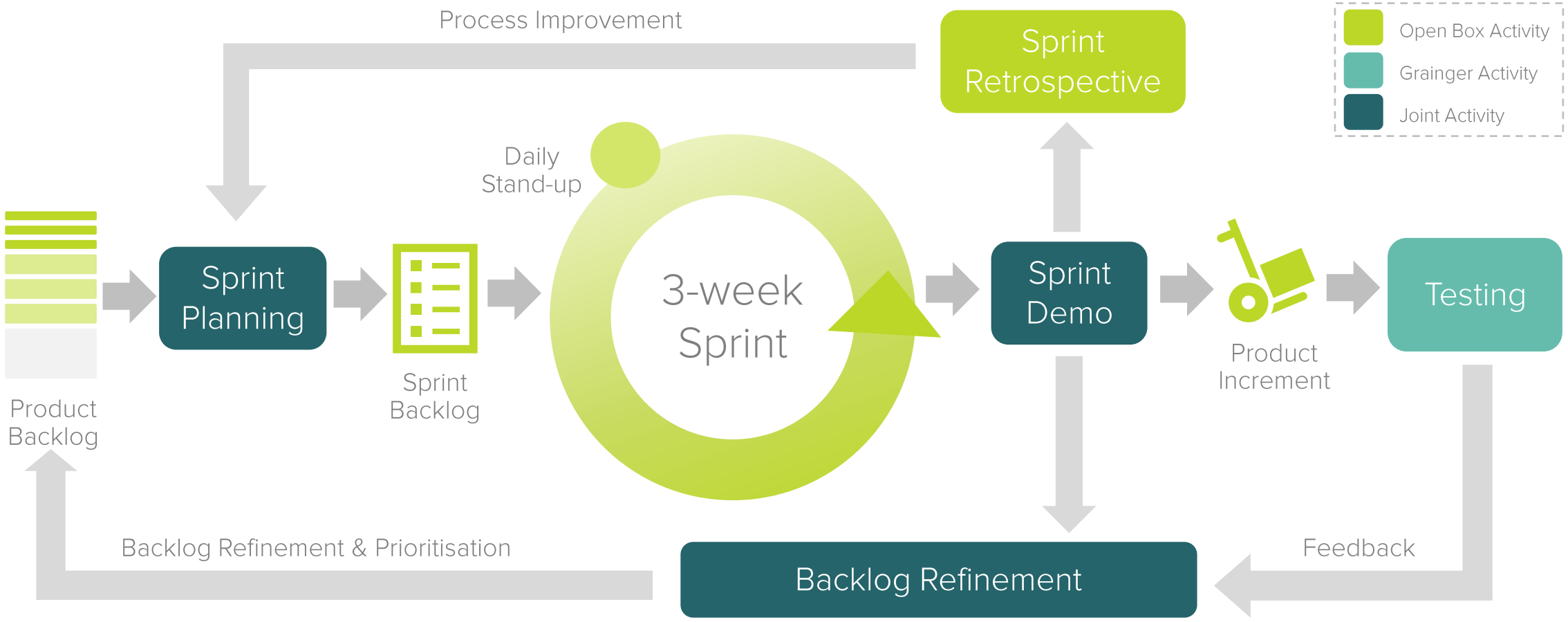


Attach photos



Agile Delivery Approach

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



Proposed Roadmap

Release 1

- Create & Complete End-to-End Void Workflow
- Calculating & Revising Estimated Timelines
- Update Salesforce Unit
- User/Team Task Lists
- Dashboards - KPIs & Voids Behind Schedule
- See Voids by Unit & Building
- Property Calendar of Onsite Void Tasks
- Upload Void Documents
- Audit History
- Replace Internal Notification Emails

Future

- Qube Integration
- Enhanced Property Calendar (Include Viewings & Other Building Activity)
- Additional Void Variations (Tenant Already Vacated, Give Notice to Vacate, Garage & Parking Bay Voids, Tenant Rescinds NTQ, Custom Tasks)
- Automated Emails to Tenants (Move In & Move Out)
- Void Variations - Unit Sale, Relet, Clean vs Refurb vs Refresh
- EPCs
- Online Tenant Instructions (DRI)
- Incorporate Delays
- Detailed Works
- FSI Integration
- Advanced Dashboards (Trends & Comparisons)
- Additional Task Details (Refurb, PVI Checklist, Detailed Works)
- Customizing Turnaround Times, Non-Working Days
- Auto Assign Tasks to Individuals

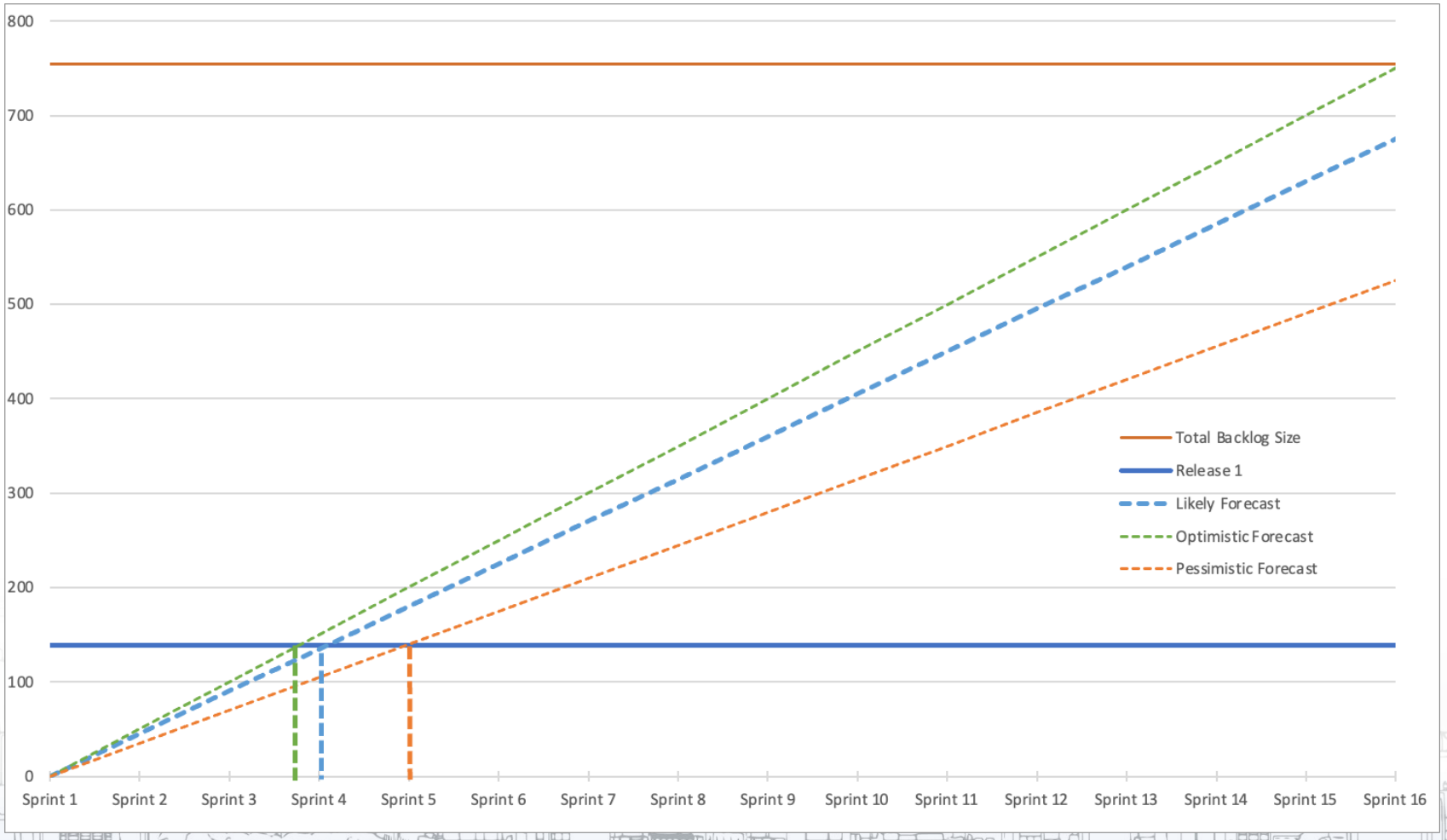
2023

1 July

30 Sept

Release 1 Forecast

- Likely: 4 sprints = 12 weeks



Project Team & Costs

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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 Month

520
hours / month

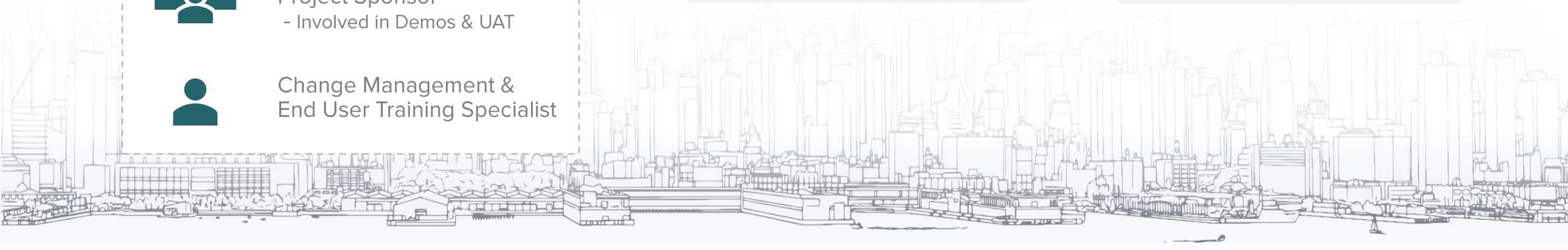
£46 735
monthly cost

Release 1

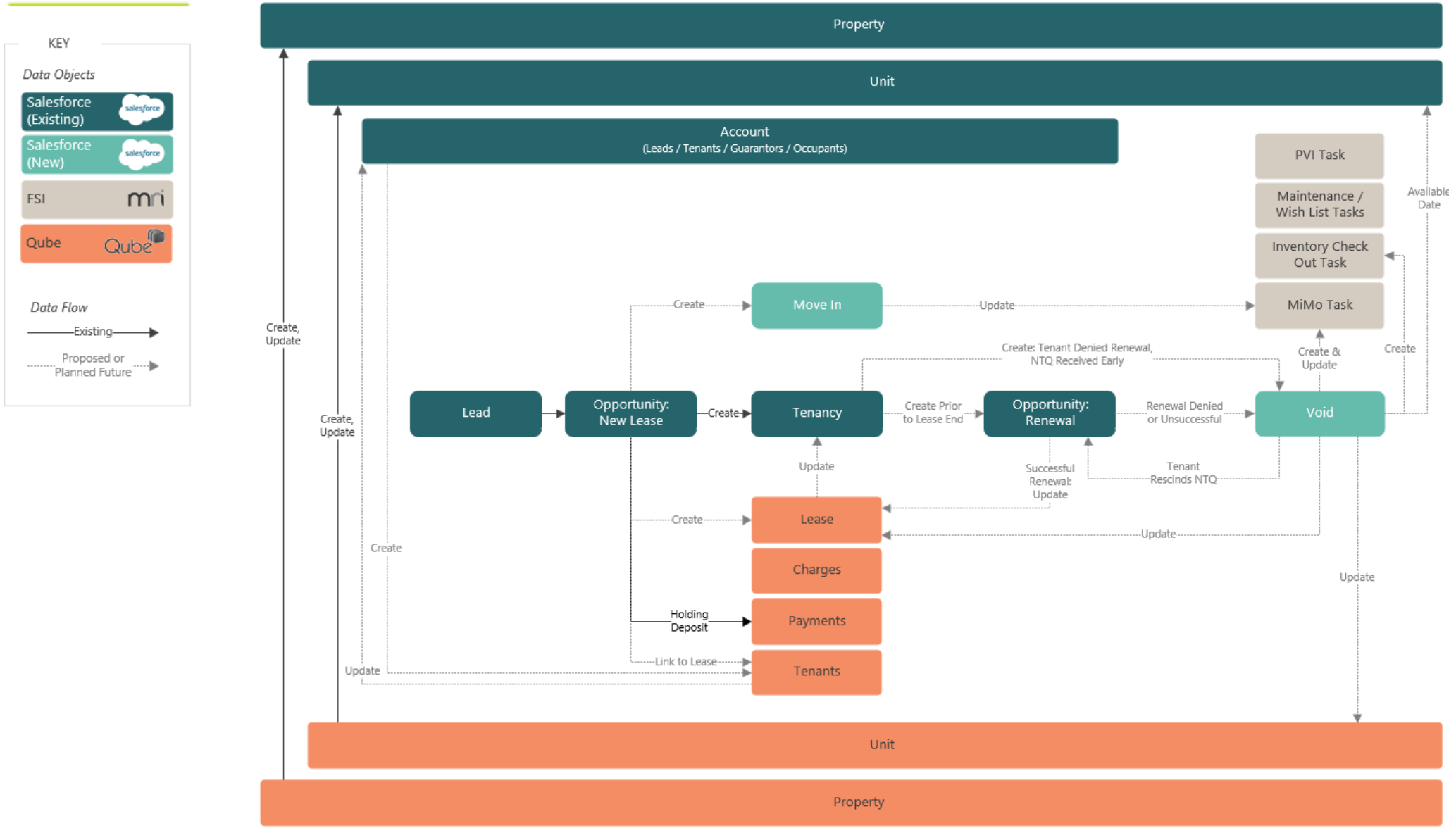
4 sprints
effort

3 months
duration

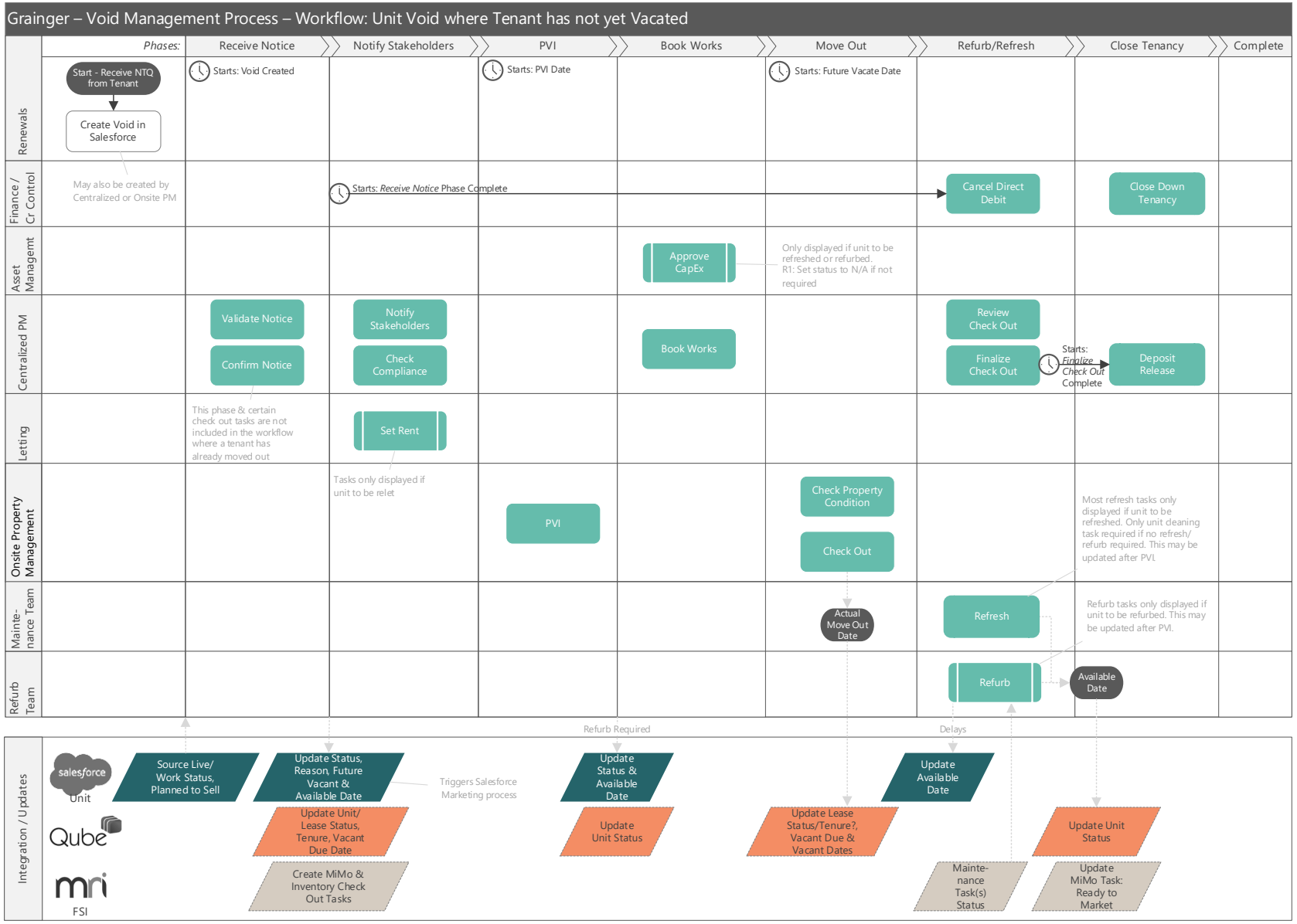
£140 205
total cost



Future-State Process: High Level Tenant Lifecycle & Data Flow



Future-State Process: Void Workflow Example



Jira Feature Backlog

FVVP Sprint 1 7 issues

Start sprint

Add dates

View linked pages

New Void - Create a Void	Future Vacant and Void...	FVVP-48
New Void - Generate Void Phases & Tasks from Template	Future Vacant and Void...	FVVP-49
Calculate Estimated Timelines - Tasks Dependent on a Void Date	Future Vacant and Void...	FVVP-50
Calculate Estimated Timelines - Tasks Dependent on Completion of a Prior Task	Future Vacant and Void...	FVVP-51
Calculate Estimated Timelines - Tasks Dependent on Completion of a Prior Phase	Future Vacant and Void...	FVVP-52
New Void - Assign Responsible Queues to Tasks	Future Vacant and Void...	FVVP-53
Assign Tasks to Individuals	Future Vacant and Void...	FVVP-55

+ Create issue

7 issues Estimate 0

Backlog 134 issues

Create sprint

Data Migration - Void Queues	Future Vacant and Void...	FVVP-54
New Void - Calculate Target PVI Date	Future Vacant and Void...	FVVP-56
See Salesforce Unit & Building Attributes in a Void	Future Vacant and Void...	FVVP-57
Capture Core Void Details	Future Vacant and Void...	FVVP-58
Capture a Reason for Updating Key Void Dates	Future Vacant and Void...	FVVP-59
Capture Comments	Future Vacant and Void...	FVVP-60
Set Tasks to Not Applicable	Future Vacant and Void...	FVVP-61
Recalculate Estimated Timelines - Updating Target PVI Date	Future Vacant and Void...	FVVP-62
Recalculate Estimated Timelines - Completing a Dependant Phase	Future Vacant and Void...	FVVP-63
Recalculate Estimated Timelines - Completing a Dependant Task	Future Vacant and Void...	FVVP-64
Recalculate Estimated Timelines - Exclude N/A Tasks	Future Vacant and Void...	FVVP-65

FVVP-47 / FVVP-48

New Void - Create a Void

Attach | Create subtask | Link issue

Description

As a Renewals, Onsite PM or Centralized PM user, I want to create a new void once the tenant has provided NTQ, so that the void process can begin.

Acceptance Criteria:

Given a user has Renewals, Onsite PM or Centralized PM access
When the user views a tenancy
Then a 'Create Void' button will be visible (regardless of tenancy status or dates)
And initially only one void workflow option will be available (i.e. to create a unit void where the tenant has not yet vacated).

When a user selects 'Create Void' from a tenancy
Then the void screen will open
And the user must capture the Future Vacant Date (required date field) that falls after the current date
And the user must capture the Target PVI Date (required date field) that falls after the current date
And the user must select the Void Owner (required dropdown of users)
And, where available, the Void Owner will default to the building's property manager (or unit manager?) saved in Salesforce.

When a new void is created
Then the void will be automatically linked to the unit and the tenancy (not editable)

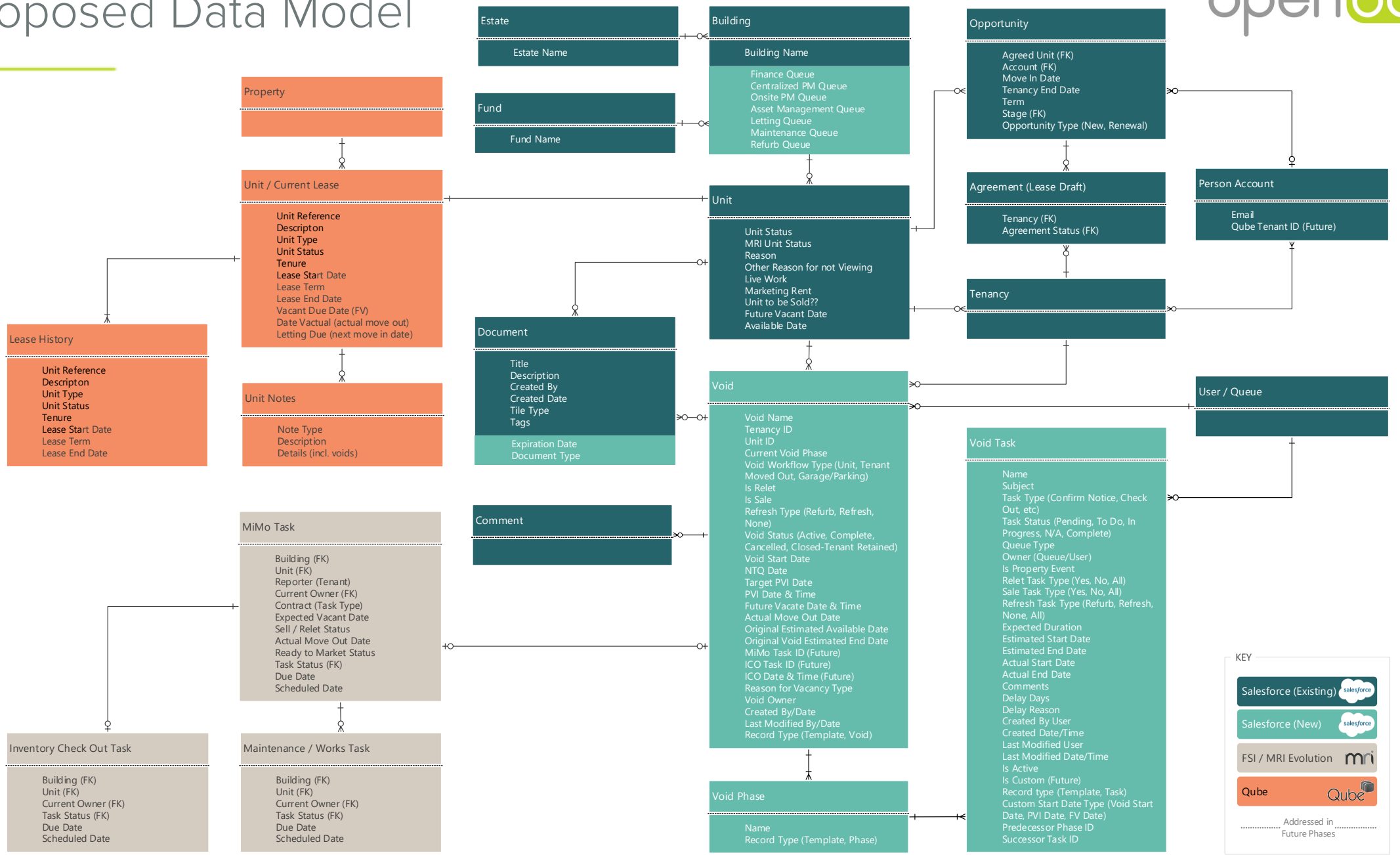
N Add a comment...

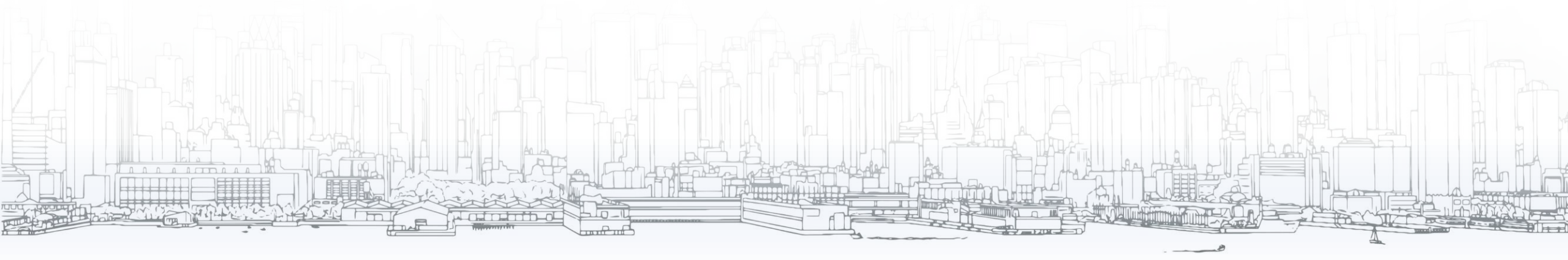
Pro tip: press M to comment

Jira Feature Backlog

- FVVP-47 Creating Void with High Level Tasks & Initial Estimated Timeline
  - FVVP-48 New Void - Create a Void
  - FVVP-49 New Void - Generate Void Phases & Tasks from Template
  - FVVP-50 Calculate Estimated Timelines - Tasks Dependent on a Void Date
  - FVVP-51 Calculate Estimated Timelines - Tasks Dependent on Completion of a Prior Task
  - FVVP-52 Calculate Estimated Timelines - Tasks Dependent on Completion of a Prior Phase
  - FVVP-53 New Void - Assign Responsible Queues to Tasks
  - FVVP-55 Assign Tasks to Individuals
  - FVVP-54 Data Migration - Void Queues
  - FVVP-56 New Void - Calculate Target PVI Date
  - FVVP-57 See Salesforce Unit & Building Attributes in a Void
  - FVVP-58 Capture Core Void Details
  - FVVP-59 Capture a Reason for Updating Key Void Dates
  - FVVP-60 Capture Comments
  - FVVP-61 Set Tasks to Not Applicable
- FVVP-46 Updating Estimated Timelines
  - FVVP-62 Recalculate Estimated Timelines - Updating Target PVI Date
  - FVVP-63 Recalculate Estimated Timelines - Completing a Dependant Phase
  - FVVP-64 Recalculate Estimated Timelines - Completing a Dependant Task
  - FVVP-65 Recalculate Estimated Timelines - Exclude N/A Tasks
- FVVP-45 Completing Tasks & Saving Actual Timeline
- FVVP-44 Cancel a Void
- FVVP-43 Tasks Lists
- FVVP-42 Unit Sale
- FVVP-41 Unit Re-let
- FVVP-40 Refurb vs Refresh & Unit Available Date
- FVVP-33 Detailed Tasks
- FVVP-39 Update Salesforce Unit Details
- FVVP-38 Void Documents v1
- FVVP-36 See Voids by Unit & Building
- FVVP-37 Audit History
- FVVP-35 Void Variation - Tenant Already Vacated
- FVVP-34 Void Variation - Notice to Vacate
- FVVP-32 Property Calendar v1 - Onsite Void Tasks
- FVVP-29 Reporting v1 - KPIs & Voids Behind Schedule
- FVVP-31 PVI Checklist
- FVVP-30 Book Works
- FVVP-28 Delays
- FVVP-27 EPCs
- FVVP-26 Replace Internal Notification Emails
- FVVP-25 Auto Assign Tasks to Individuals
- FVVP-24 Property Calendar Enhancements - Include Viewings, Building & Unit Tasks
- FVVP-23 Advanced Dashboards - Trends & Comparisons
- FVVP-22 Working Days
- FVVP-21 Qube Integration
- FVVP-20 FSI Integration - Create / Update MiMo & ICO Tasks
- FVVP-17 Move Out Email
- FVVP-15 PVI Follow Up Email
- FVVP-14 Email Check Out Report
- FVVP-16 Online DRI
- FVVP-13 Detailed Refurb Tasks
- FVVP-12 Garage/Parking Bay Void
- FVVP-11 Refining Target Turnaround Times
- FVVP-9 Create Custom Tasks
- FVVP-19 Tenant Rescinds NTQ - Create Tasks to Reverse Updates
- FVVP-18 Tenant Rescinds NTQ - Reverse Qube/FSI Updates
- FVVP-10 FSI Integration - Source Task Status
- FVVP-8 Online NTQ
- FVVP-7 Renewal Opportunity (NON VOID)
- FVVP-6 Move In Workflow (NON VOID)
- FVVP-5 Source Meter Readings from Hive
- FVVP-3 Key Log
- FVVP-4 Pricing Play Book (NON VOID)
- FVVP-2 Tenant Arrears (NON VOID)
- FVVP-1 Complaints Register (NON VOID)

Proposed Data Model



Next Steps

- Grainger to confirm they happy for Open Box to proceed.
- Open Box to deliver a Statement of Work for a 3-month engagement to deliver the first release of Void Management.