



Grainger

Void Management

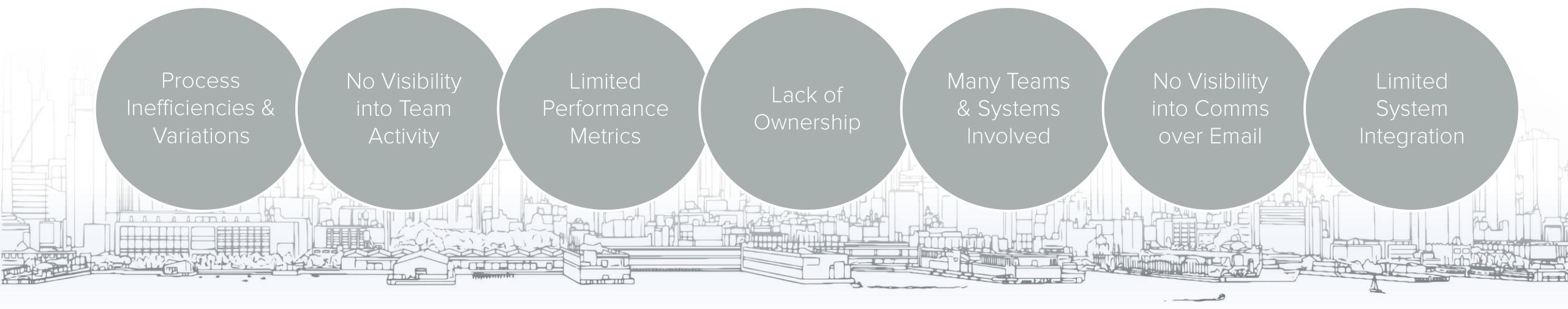


Overview

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:

A faint, light-grey line drawing of a city skyline with various buildings, skyscrapers, and architectural details, serving as a background for the challenge circles.

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 :

A faint, light-grey silhouette of a city skyline with numerous skyscrapers and buildings, serving as a background for the objective circles.

Measure Targets, Timeframes & KPIs

Visibility into Progress, Delays & Forecasted Completion

Visibility into Team Workload

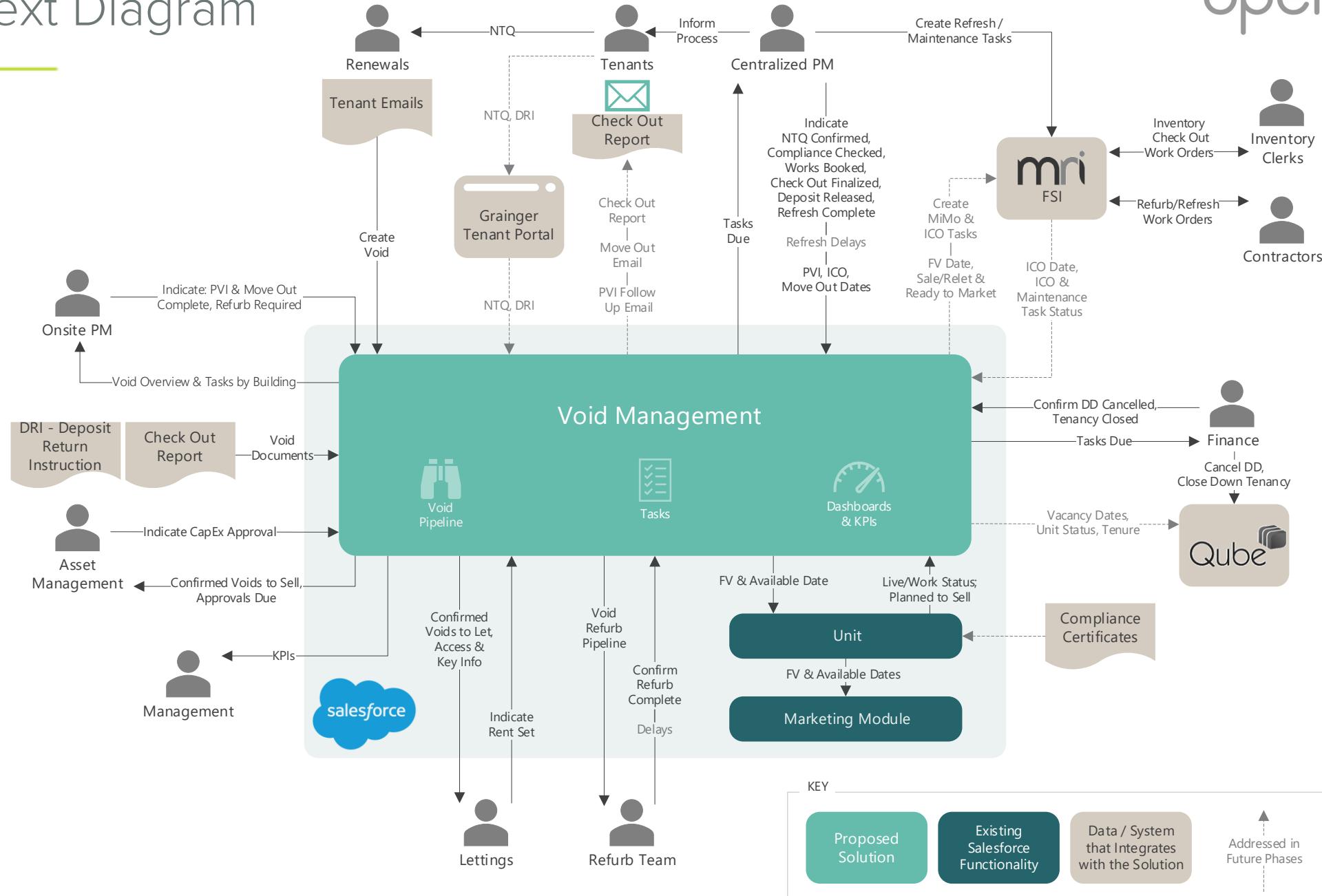
Clear Responsibility

Standardise Process while Allowing for Flexibility

Automate Notifications to Internal Teams

Move Towards Single View of Customer & Property

Context Diagram



Proof of Concept



The screenshot shows a Salesforce mobile application running on a tablet. The main screen displays a 'Tenancy' record for opportunity number 00024921. The record details include the Tenancy Owner (Sam), Tenancy Number (00024921), Opportunity (Jacob Smycz), Account Name (Jacob Smycz), Unit (42 Adlay Apartments, E16 2YG), and Tenancy Status (Draft). A modal dialog box titled 'Create Void' is open in the foreground. The 'Create Void' dialog contains fields for 'Future Vacant Date' (31/07/2023) and 'NTQ Date' (01/06/2023), a 'Void Type' dropdown set to 'Refurb', and a 'Void Notes' rich text area containing the text 'Tenant has given notice via email today, see attached files'. At the bottom of the dialog are 'Cancel' and 'Save' buttons. A callout bubble on the right side of the screen points to the 'Create Void' button with the text: 'Initiate a new void from the relevant Tenancy'.

Proof of Concept

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

The screenshot shows a Salesforce application window for 'Grainger PLC'. The main view is a 'Void' record (V-000033) for unit 42 Adlay Apartments, E16 2YG, tenancy 00024921, with a future vacant date of 31/07/2023. The 'Receive Notice' tab is active. A 'Task List' sidebar on the right displays a list of outstanding tasks with due dates ranging from June 9 to July 27, 2023.

Task Description	Target End Date
Notify stakeholders To Do	26 Jul 2023
Deposit Release To Do	24 Jul 2023
Complete inventory To Do	18 Jul 2023
Check electricity meter To Do	16 Jul 2023
Review checkout report To Do	11 Jul 2023
Finalise checkout To Do	9 Jul 2023
Cancel direct debit To Do	9 Jun 2023

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

Proof of Concept



The screenshot shows a tablet displaying a software application for managing void processes. The main screen is titled "Void V-000033" and shows a flowchart with eight phases: Receive Notice, Update Stakeholders, PVI, Book Works, Move Out, Refurb/Refresh, Close Tenancy, and Complete. A callout bubble highlights the "Void Phases" section, which lists the eight phases with their target start and end dates. Below this is a "Task List" section showing various outstanding tasks with their due dates.

Key Fields

Unit	42 Adlay Apartments, E16 2YG
Tenancy	00024921
Future Vacant Date	31/07/2023

Guidance for Success: Validate that notice is genuine and get written confirmation from tenants

Phases with projected start & end dates

Void Phases (8)

Void Phase Name	Target Start Date	Target End Date	% Complete	Status
1 Receive Notice	12/05/2023	26/05/2023	0%	Not Started
2 Update Stakeholders	29/05/2023	01/06/2023	0%	Completed
3 PVI	02/06/2023	09/06/2023	0%	Completed
4 Book Works	10/06/2023	15/06/2023	0%	Completed
5 Move Out	16/06/2023	21/06/2023	0%	Completed
6 Refurb/Refresh	22/06/2023	27/06/2023	0%	In Progress
7 Close Tenancy	28/06/2023	03/07/2023	0%	Completed
8 Complete	04/07/2023	09/07/2023	0%	Completed

Task List

Outstanding Tasks

Task Description	Target End Date
Notify stakeholders To Do	26 Jul 2023
Deposit Release To Do	24 Jul 2023
Complete inventory To Do	18 Jul 2023
Check electricity meter To Do	16 Jul 2023
Review checkout report To Do	11 Jul 2023
Finalise checkout To Do	9 Jul 2023

Proof of Concept

openbox

Building
Adlay Apartments, 3 Millet Place, London E16

Estate: Eleanor Court Total Number of Units: 154

Details Related

Building Name: Adlay Apartments, 3 Millet Place, London E16

Estate: Eleanor Court

Pets Friendly:

Directions:

Sharers Welcome:

Marketing Description:

18 digit Build Id: a183L000000XAExQAO

Address Information

City List: London

County:

Units Information

Total Number of Units: 154

Number of Floors:

Number of Available Units: 1

Number of Unavailable Units: 110

Number of Live Units: 154

Number of Non-Live Units: 0

Void Tasks for the Building

Search

Upcoming & Overdue

- > ✓ Finalise checkout | To Do ⚠ 5 Jul 2023
- > ✓ Complete inventory | To Do ⚠ 27 May 2023
- > ✓ Complete inventory | To Do ⚠ 27 May 2023
- > ✓ Complete inventory | To Do ⚠ 27 May 2023
- > ✓ Complete inventory | To Do ⚠ 27 May 2023
- > ✓ Complete inventory | To Do ⚠ 27 May 2023
- > ✓ Complete inventory | To Do ⚠ 27 May 2023
- > ✓ Complete inventory | To Do ⚠ 27 May 2023
- > ✓ Complete inventory | To Do ⚠ 27 May 2023
- > ✓ Check electricity meter | Pending ⚠ 17 May 2023
- > ✓ Check electricity meter | Pending ⚠ 17 May 2023

Consolidated view of tasks at building level

Proof of Concept

openbox

The dashboard displays various metrics and lists related to void management across different buildings and users.

Void Phase Duration by Block

Average Duration

Building	Phase	Average Duration
Adlay Apartments, 3 Millet ...	Book Works	~30
Adlay Apartments, 3 Millet ...	Close Tenancy	~30
Adlay Apartments, 3 Millet ...	Complete	~30
Adlay Apartments, 3 Millet ...	Move Out	~30
Adlay Apartments, 3 Millet ...	PVI	~30
Building #1	Update Stakeholders	~30
Building #1	Receive Notice	~30
Building #1	Refurb/Refresh	~30

[View Report \(Void Phase Duration by Block\)](#)

Overdue Voids

Void: Void N...	Phase	Target Start Dat...	Target End ...	Status	Unit
V-000001	Receive Notic	12/05/2023	26/05/2023	Not Starte	Unit #1
V-000007	Move Out	12/05/2023	15/05/2023	In Progres	Unit #1
V-000020	Move Out	12/05/2023	26/05/2023	In Progres	Unit #1
V-000025	Receive Notic	12/05/2023	26/05/2023	Not Starte	Unit #1
V-000027	Receive Notic	12/05/2023	26/05/2023	Not Starte	Unit #1
V-000022	Receive Notic	12/05/2023	26/05/2023	Not Starte	2 Adlay Apartments, E16 2YG
V-000021	Receive Notic	12/05/2023	26/05/2023	Not Starte	42 Adlav Apartments, E16

[View Report \(Overdue Voids\)](#)

Void Tasks by Building

Record Count

Building Name	Status	Record Count
Adlay Apartments, 3 Millet Place,...	Pending	~10
Adlay Apartments, 3 Millet Place,...	To Do	~10
Adlay Apartments, 3 Millet Place,...	In Progress	~10
Adlay Apartments, 3 Millet Place,...	Completed	~10
Building #1	Pending	~10
Building #1	To Do	~10
Building #1	In Progress	~10
Building #1	Completed	~10

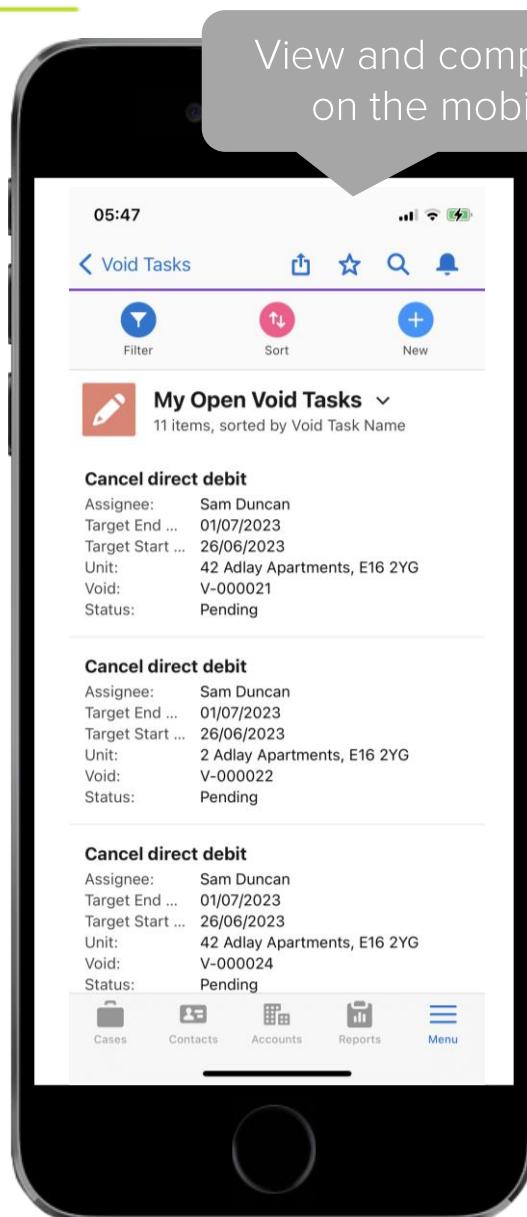
Void Tasks by Assignee

Record Count

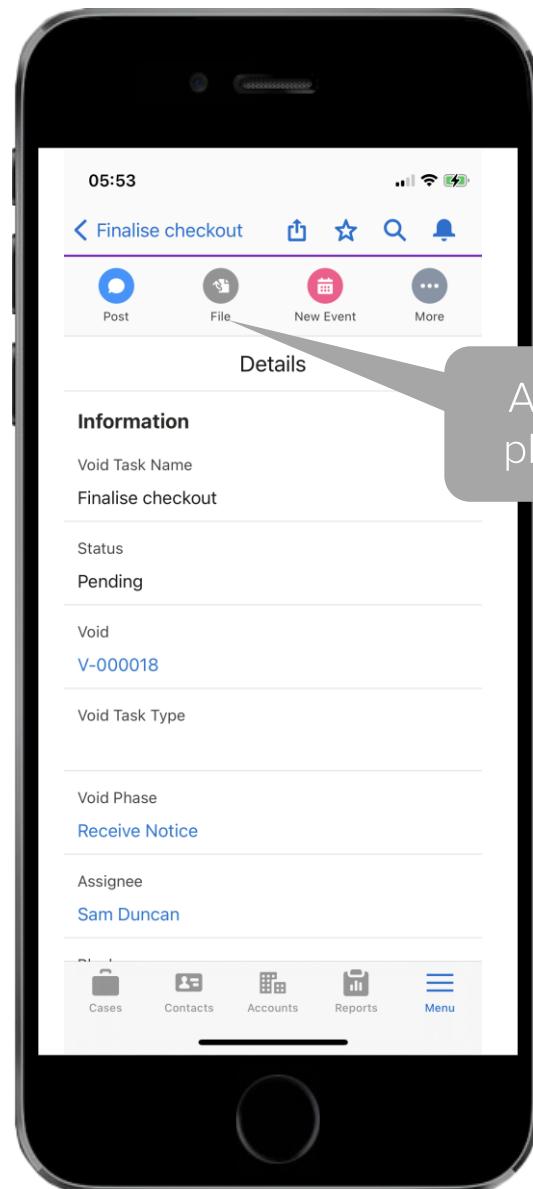
Assignee	Status	Record Count
Anjali Salecha	Pending	~30
Anjali Salecha	To Do	~30
Anjali Salecha	In Progress	~30
Anjali Salecha	Completed	~30
Matthew Lister	Pending	~30
Matthew Lister	To Do	~30
Matthew Lister	In Progress	~30
Matthew Lister	Completed	~30
Melanie Hau...	Pending	~30
Melanie Hau...	To Do	~30
Melanie Hau...	In Progress	~30
Melanie Hau...	Completed	~30
Mitchell Foot	Pending	~30
Mitchell Foot	To Do	~30
Mitchell Foot	In Progress	~30
Mitchell Foot	Completed	~30
Nenad Rank...	Pending	~30
Nenad Rank...	To Do	~30
Nenad Rank...	In Progress	~30
Nenad Rank...	Completed	~30
Paul Ruston	Pending	~30
Paul Ruston	To Do	~30
Paul Ruston	In Progress	~30
Paul Ruston	Completed	~30
Rebecca Crow	Pending	~30
Rebecca Crow	To Do	~30
Rebecca Crow	In Progress	~30
Rebecca Crow	Completed	~30
Rebecca Lin...	Pending	~30
Rebecca Lin...	To Do	~30
Rebecca Lin...	In Progress	~30
Rebecca Lin...	Completed	~30
Robert Steel	Pending	~30
Robert Steel	To Do	~30
Robert Steel	In Progress	~30
Robert Steel	Completed	~30
Sam Duncan	Pending	~30
Sam Duncan	To Do	~30
Sam Duncan	In Progress	~30
Sam Duncan	Completed	~30
Sarah Baptiste	Pending	~30
Sarah Baptiste	To Do	~30
Sarah Baptiste	In Progress	~30
Sarah Baptiste	Completed	~30

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

Proof of Concept



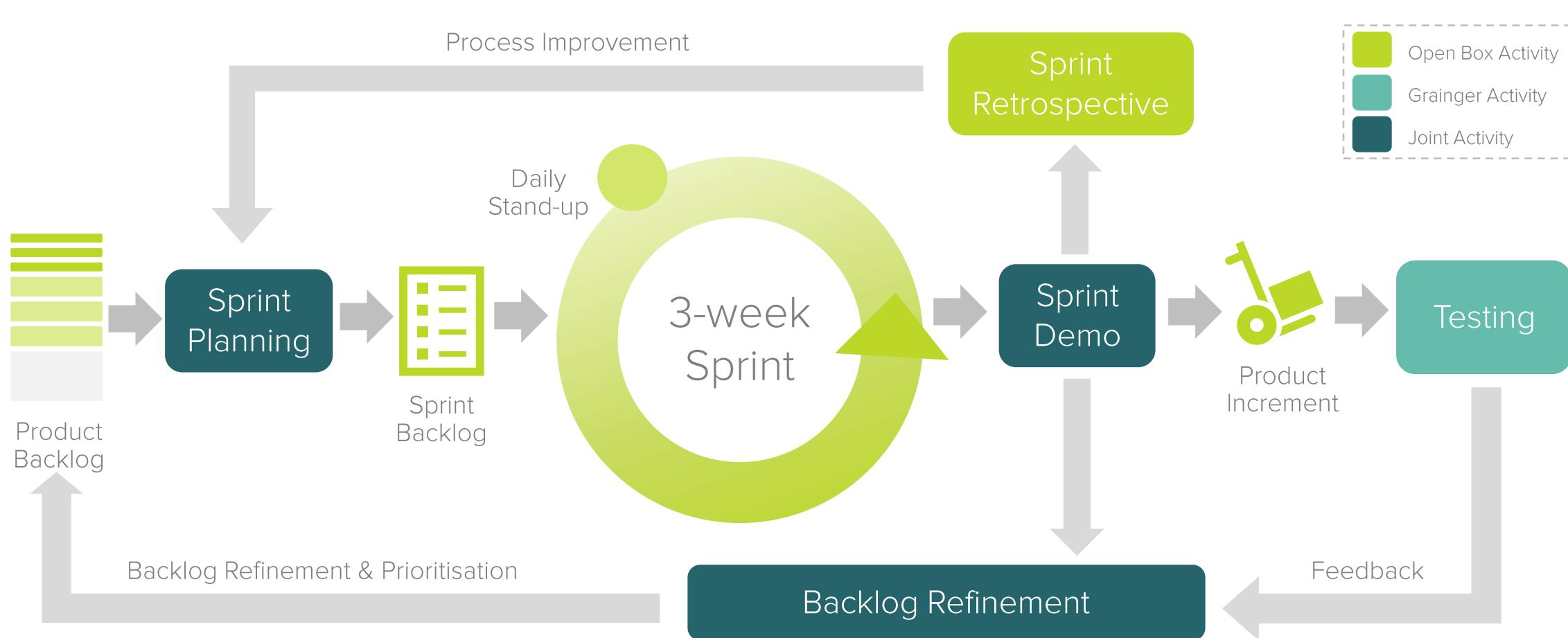
View and complete tasks
on the mobile app



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
- Customizing Turnaround Times, Non-Working Days
- Detailed Works
- FSI Integration
- Advanced Dashboards (Trends & Comparisons)
- Additional Task Details (Refurb, PVI Checklist, Detailed Works)
- Auto Assign Tasks to Individuals

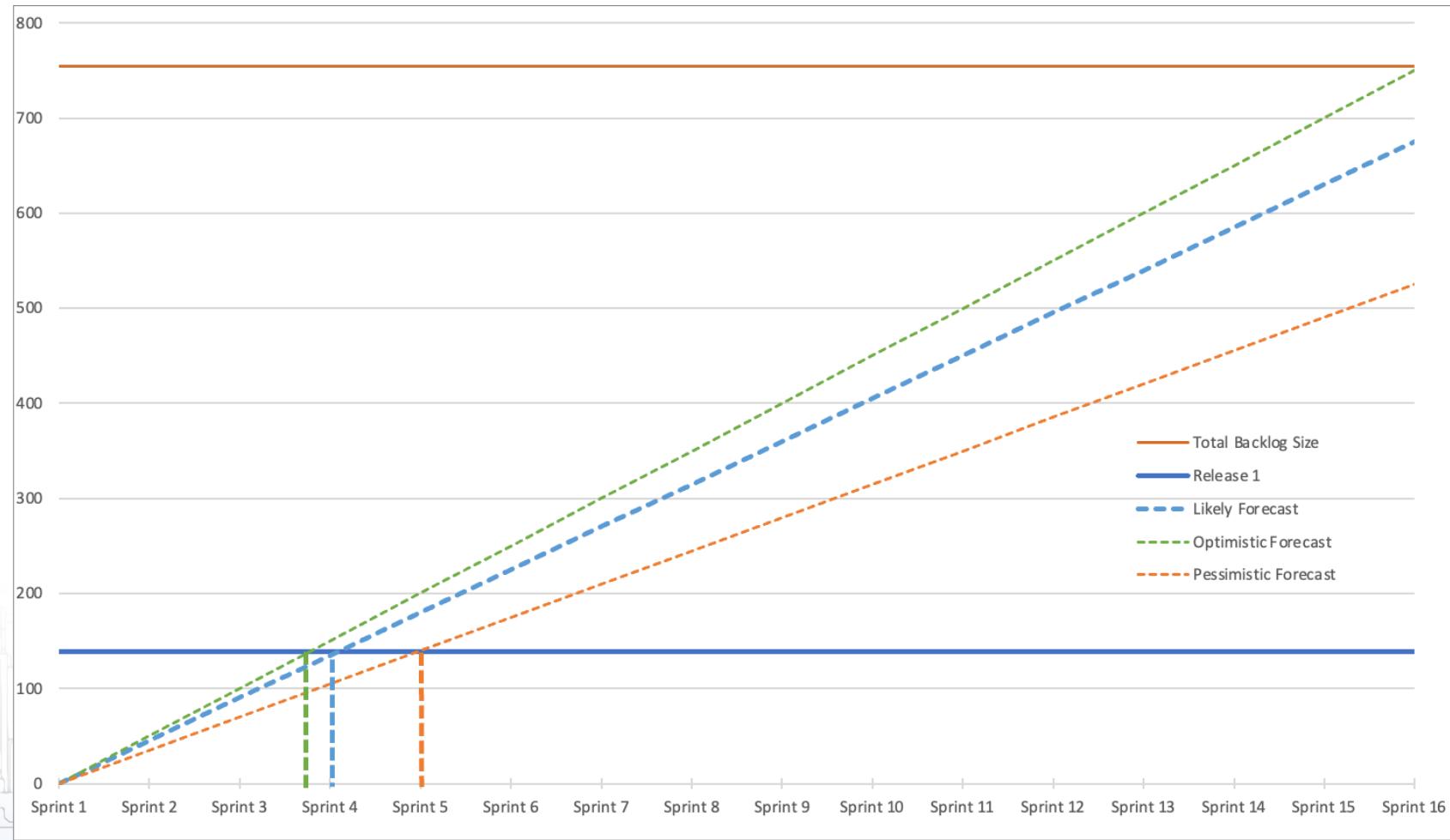
2023

1 July

30 Sept

Release 1 Forecast

- Likely: 4 sprints = 12 weeks



Project Team & Costs

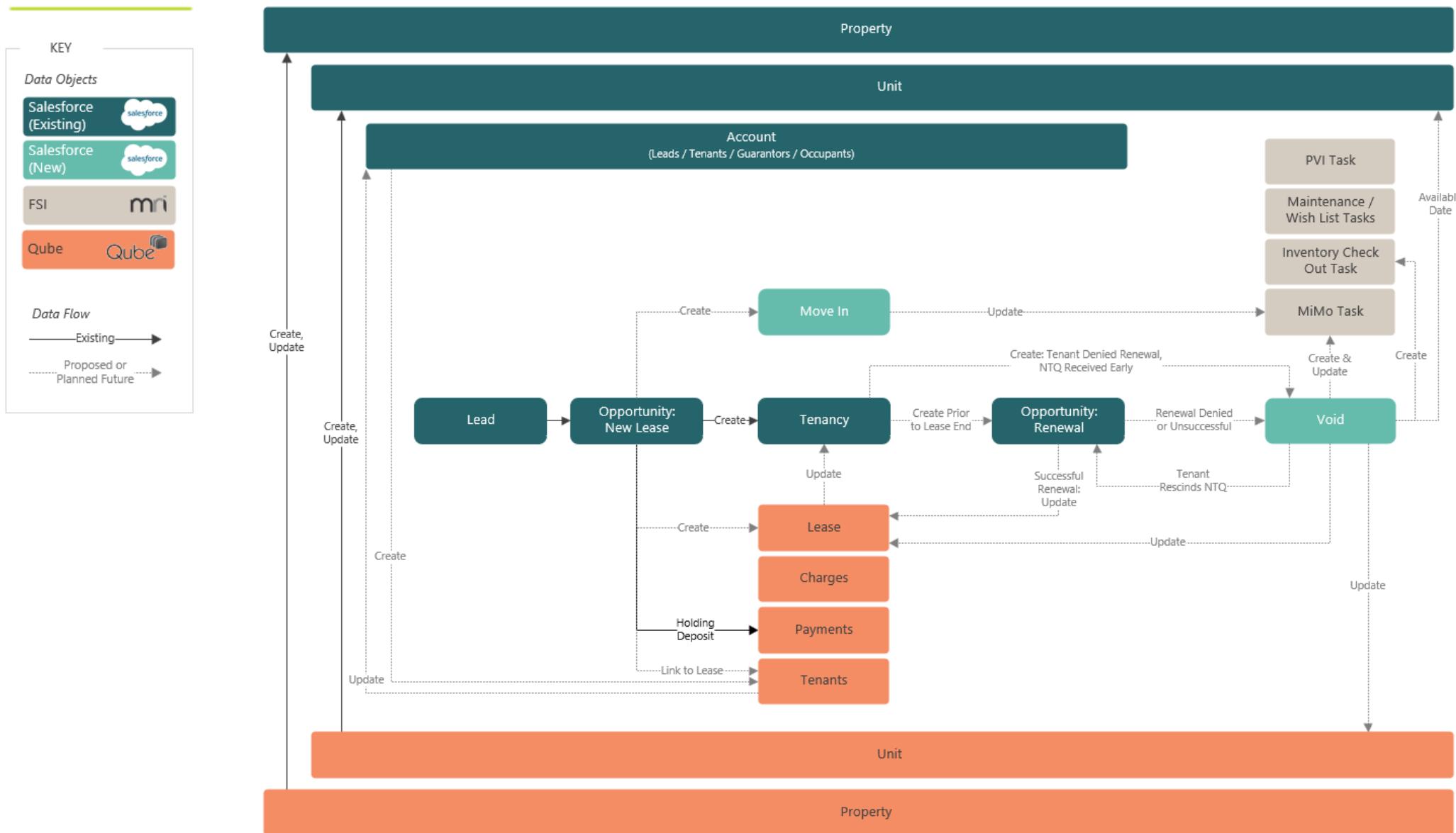


OPEN BOX DELIVERY TEAM	
	Salesforce Architect
	Business Analyst
	Developers
	Quality Assurance
	Project Manager

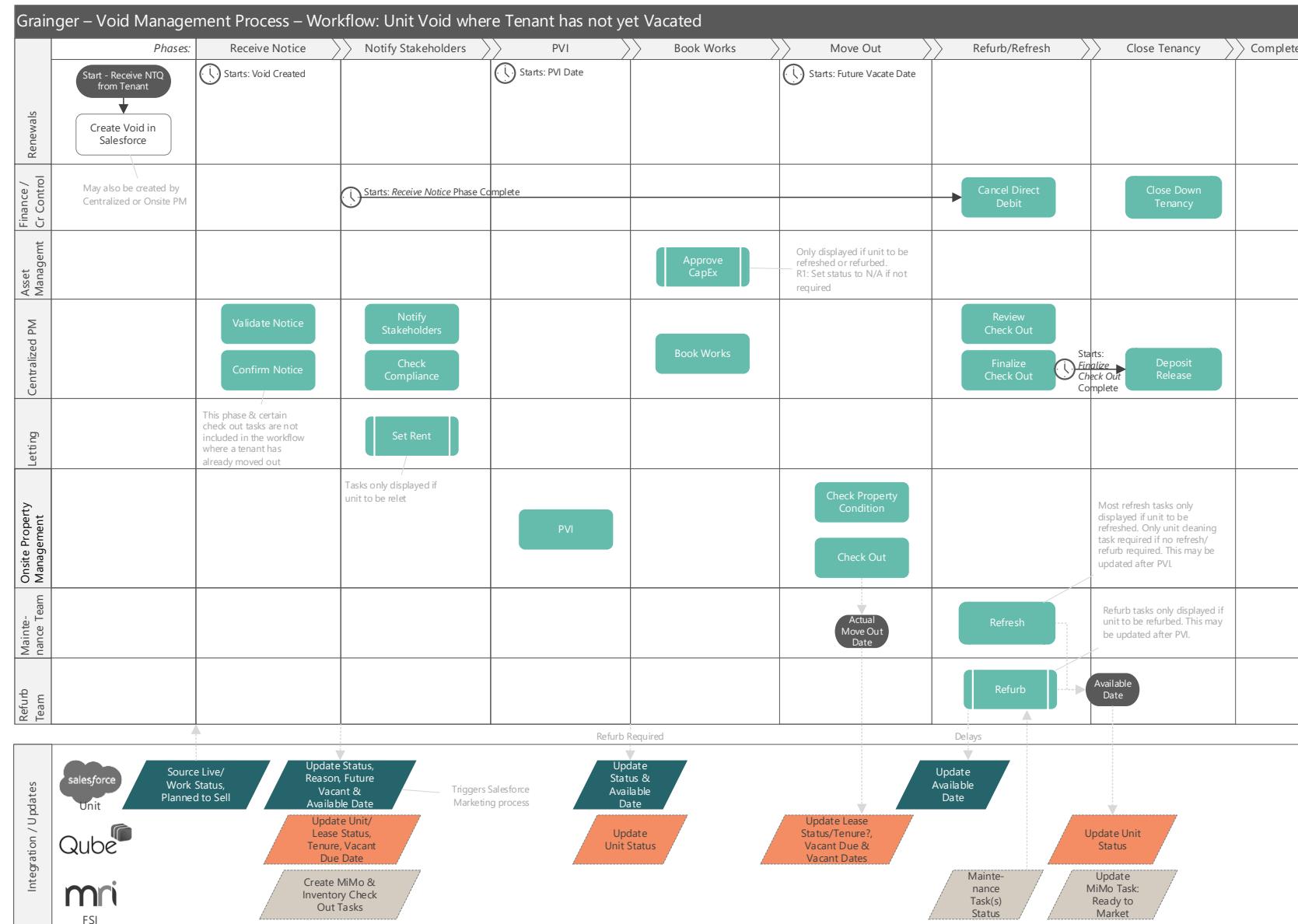
GRAINGER DELIVERY TEAM	
	Product Owner - Main point of contact
	Subject Matter Experts Project Sponsor - Involved in Demos & UAT
	Change Management & End User Training Specialist



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



Future-State Process: Void Workflow Example



Jira Feature Backlog



FVVP Sprint 1 7 issues

[Add dates](#)

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](#)

[Start sprint](#)

[View linked pages](#)

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...

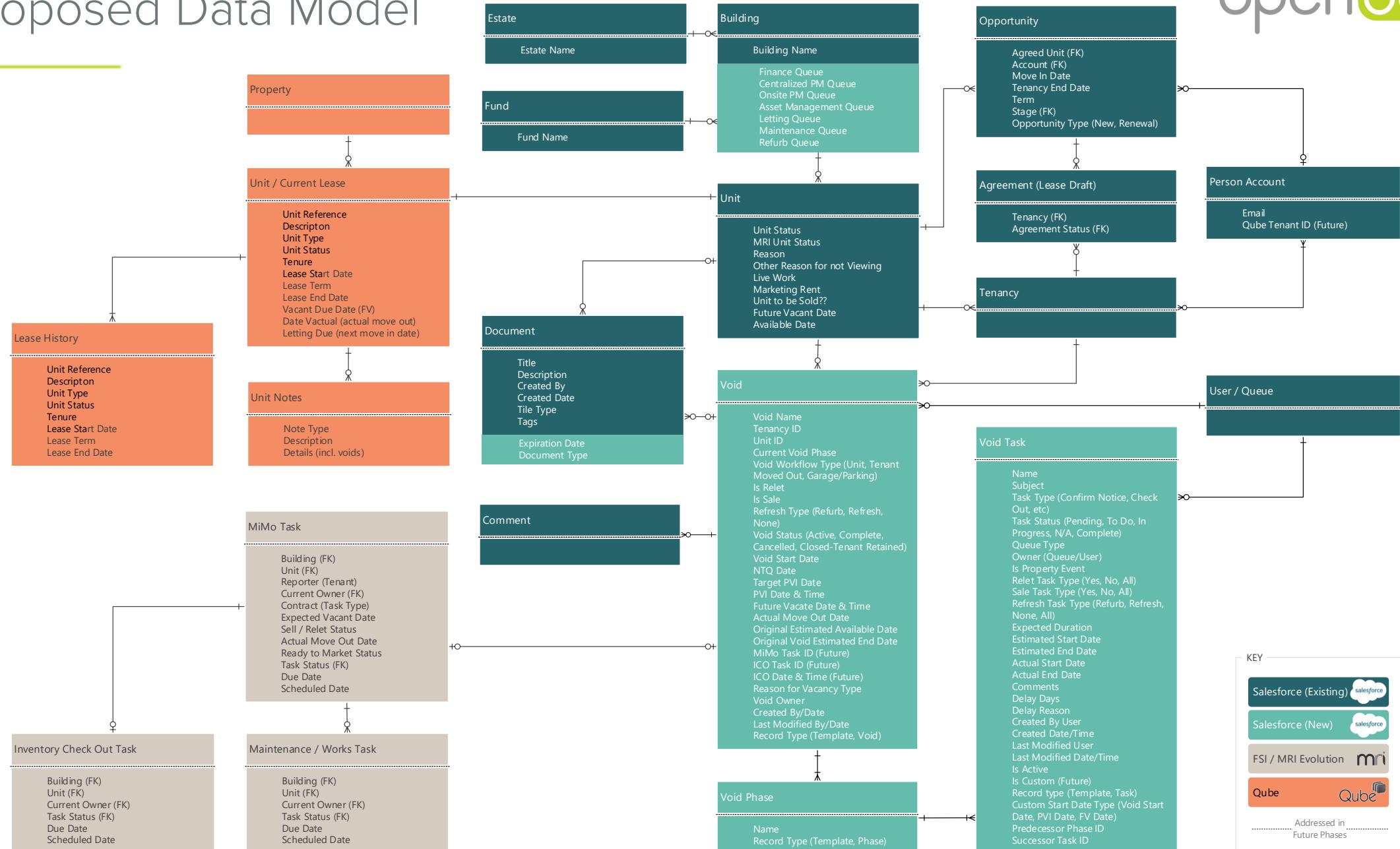
Pro tip: press M to comment

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.

