

Business Optimisation: Opportunity Outline Commercial Reporting

29th November 2023

Opportunity Name:

Business Owner/ Sponsor:	Sarah Norstrom		
Submitted by:	Sarah Norstrom	Business area:	Commercial / Investment

Problem Statement

Currently all commercial reporting is manual and held by Commercial via excel and word format reporting until the opportunity completes and is placed onto Qube. This creates a lack of visibility around opportunities, offers, time taken to move from offer to completion as well as missing detail around agents appointed and fall throughs.

Business Objective

Bring Commercial Lettings onto systems to allow the leasing journey to be tracked and reported accurately through SF, similar to the residential process.

Business Outcome

Capture all commercial activity via systems prior to commercial lease completing and moving onto Qube / accounting software.

Benefits

Greater visibility of commercial activity, move away from manual reporting and record keeping via excel / word, reduce time and workload for reporting

Is this a compliance/ regulatory impact for consideration

No

Risks

Training team on new process and adopting new processes into workflow – considered low risk based on time saved once implemented and adopted.

Additional Information

Growing commercial portfolio – ERV c.£4m across BTR and PRS.

Please submit your completed form to the Business Optimisation Team.

Thank you