



# SiteLink 2 Way Texting

March 2021



# Business Goals

Ensure platform stays fresh and modern

Continue adding value for customers

Prove value behind price increases



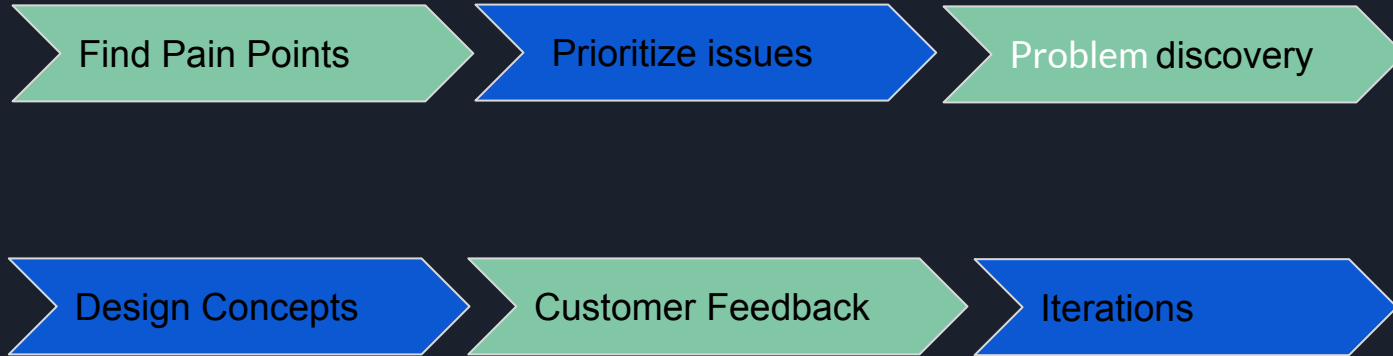
# Business Problem

Every time we chat with a large customer, especially ones on the Client Advisory Board (CAB), they mention this:

“You keep raising prices, yet we don’t seem to get much in return...”



# Enter Product Design



Validated Product Win



# CAB Areas of Concern

Workflow Management

Better lead reporting

Granular Permissions

Automate manual recurring tasks

Visibility into user activity

Allow easier communication with tenants



# 2 Way Texting

## Goal

Better manage tenant SMS messages

## Pain points

Emails go unnoticed

Third party options don't integrate well



# Discovery

Validated that SMB segment also has this problem

- Win for everyone

SMS is the preferred communication channel

- Higher engagement with tenants

Clunky to manage today

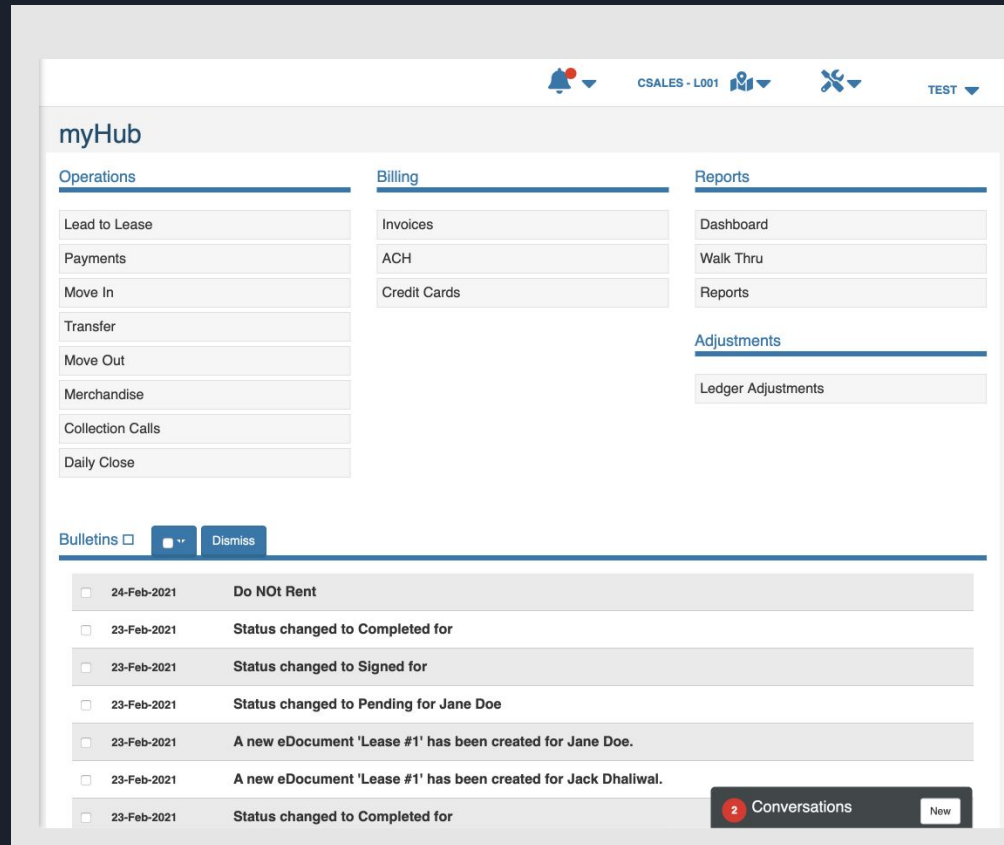
- Managers use their own phones or another system
- No consistent number to send from
- Have to copy messages over to tenant account

# Web Platform Design

Docked chat is always present

Allows for clear notification of a new message

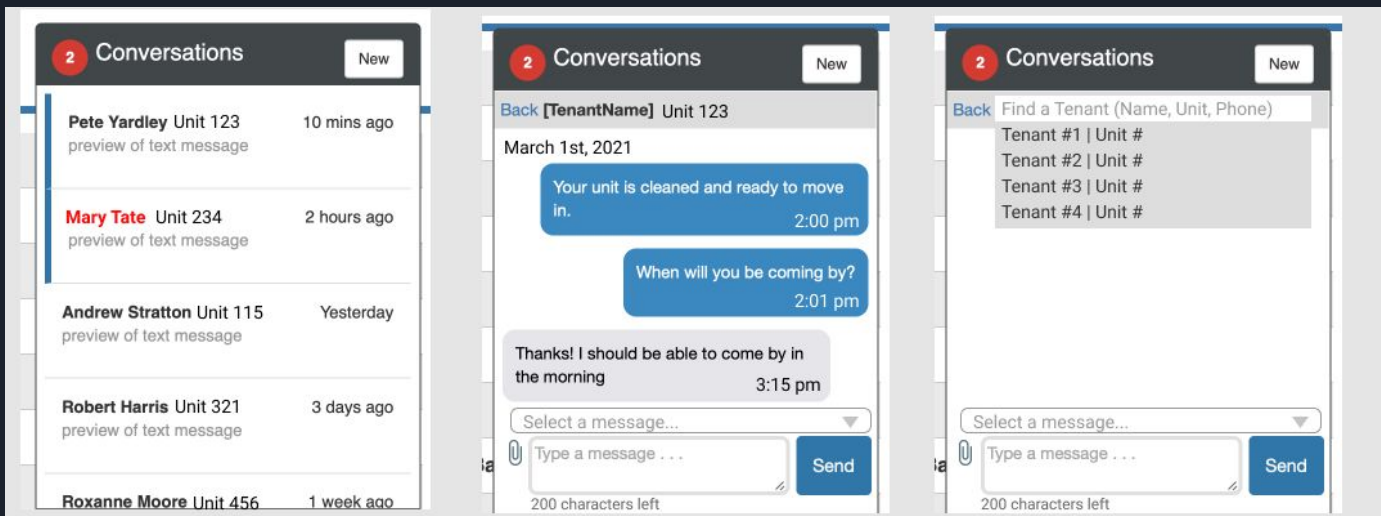
No matter what task managers may be in the middle of they can quickly respond



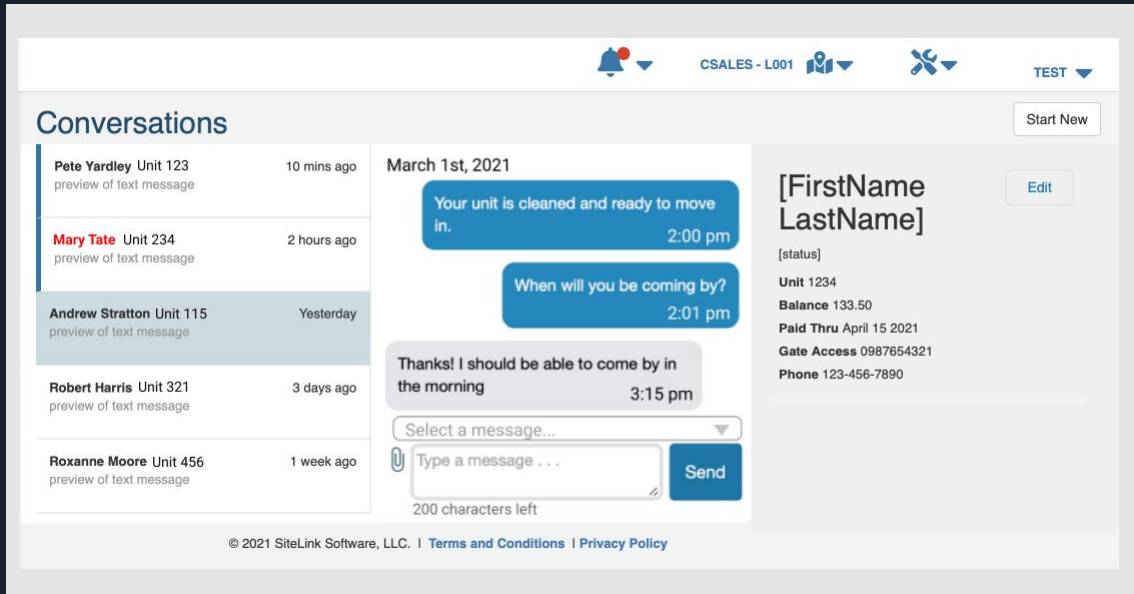


# Web Platform Design

List of recent messages with context on history and tenant



# Web Platform Design



Page with index of all conversations over time for records with tenant summary

# Legacy Windows Design

Tenants

Legend

Primary

In Auction

Other Authorized

Moved Out

Unit	Name	Company	Gate Code	Phone	Balance	Paid Thru	Last Message
100	Berry, Halle B	Wigits Mfg Co.	7944280064	0			text preview 2 hrs ago
103	Berry, Halle B	Wigits Mfg Co.	7944280064	0			text preview 2 hrs ago
104	Berry, Halle B	Wigits Mfg Co.	7944280064	0			text preview 2 hrs ago
105	Berry, Halle B	Wigits Mfg Co.	7944280064	0			text preview 2 hrs ago
106	Berry, Halle B	Wigits Mfg Co.	7944280064	0			text preview 2 hrs ago
B04	Berry, Halle B	Wigits Mfg Co.	7944280064	0			text preview 2 hrs ago
101	Chan, Jackie		3969039360	202-555-1212			text preview 2 hrs ago
RV012	Chan, Jackie		3969039360	202-555-1212			text preview 2 hrs ago
215	Gooding, Cuba		7673359360	312-555-1212			text preview 2 hrs ago
216	Hecker, Markus R		9263637504	919-648-3348			text preview 2 hrs ago
220	Jackson, Samuel	LA Films, Inc.	5615706112	213-742-7275			text preview 2 hrs ago

Lookup Name

Unit

Gate Code

☒ Show only Primary Tenants

☒ Show only Current Tenants

Tenant Name | Unit # | Past Due - Conversation History

March 1st 2021

Your unit is cleaned and ready to move in.  
9:01am

When will you be coming by?  
9:02am

Thanks! I should be able to come by in the morning  
10:03am

Select a message...

0 / 200

Close

Send Message

Tenant

New Conversation

Account

Notes

Ledger Settings

Marketing

Credit Card

Multi-Unit Credit Card

ePhotos & eFiles

E-Mail

Reports

Ledger

Payments

Charges

Close

# Legacy Windows Design

Tenants

## Legend

Primary In Auction  
Other Authorized Moved Out

Unit	Name	Company	Gate Code	Phone	Balance	Paid Thru	Last Message
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Lookup Name  
Unit  
Gate Code

☒ Show only Primary Tenants  
☒ Show only Current Tenants

## New Conversation

Find a Tenant (Name, Unit, Phone)

Unit	Name	Phone
100	Berry, Halle B	0
103	Berry, Halle B	0
104	Berry, Halle B	0
105	Berry, Halle B	0
106	Berry, Halle B	0
B04	Berry, Halle B	0
101	Chan, Jackie	202-555-1212
RV012	Chan, Jackie	202-555-1212
215	Gooding, Cuba	312-555-1212
216	Hecker, Markus R	919-648-3348
220	Jackson, Samuel	213-742-7275

Select a message...



0 / 200

Close

Send Message

Refresh  
Print  
Help

## Tenant

New Conversation

## Account

Notes  
Ledger Settings  
Marketing

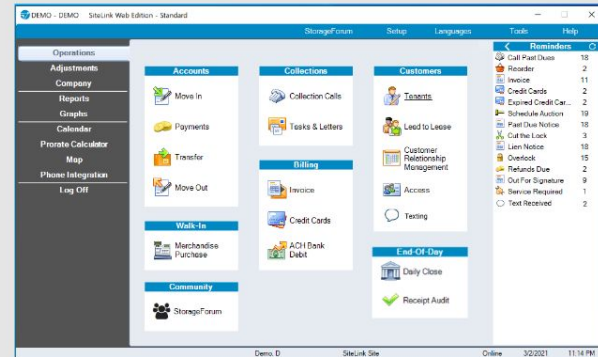
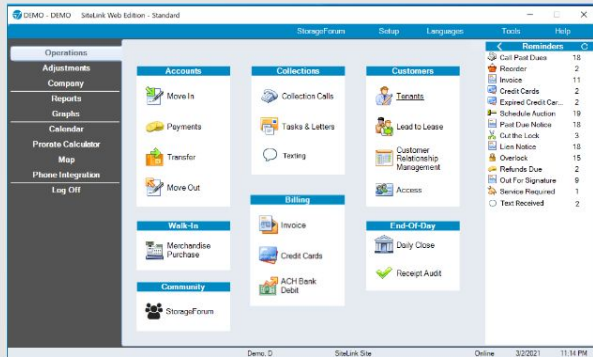
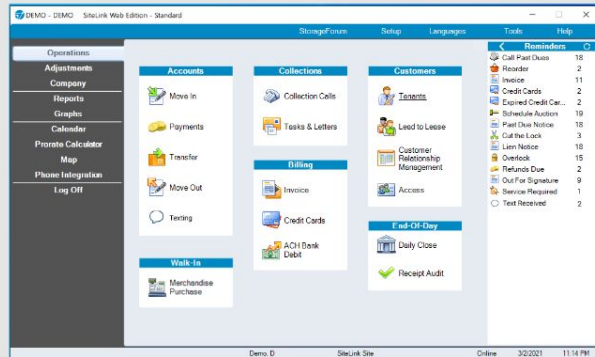
Credit Card  
Multi-Unit Credit Card  
ePhotos & eFiles  
E-Mail

## Reports

Ledger  
Payments  
Charges

Close

# Legacy Windows Design



Need to identify best fit for this feature



# Usability Testing

1 round with 6 customers

- Mix of enterprise and SMB
- Some repeats from discovery

Remote interview sessions

Tested prototype flow for both versions & gave feedback

Is this core set of functionality enough for to allow managers to communicate with tenants over SMS inside SiteLink?



# Customer Feedback

‘ Oh look at that. I like it, fantastic! ‘

‘ Honestly, I like it a lot, clean and simple ‘

‘ Makes me excited to use MyHub ‘



# Key Findings

Immediately saw the value in the functionality and thought it was simple and straightforward to use

Lots of enhancement opportunities to integrate further into the platform over time

Functionality can look and behave consistently on both platforms as needed





# Opportunities to consider

Character limits

Number texts will be sent from (1 or many)

Spanish language support

Sending pictures or attachments

Control via permissions

Reuse UI pattern for email



Thank You