<u>RMC Registration Flow – SMSC Platform</u>

Purpose This funnel is designed to:

1. Engage residents and directors with an estimate of local management fees.
2. Filter out non-serious users by offering a preview (ballpark figures) but reserving full tender access for committed users.
3. Make registration smooth, mobile-friendly, and clearly communicate value.

<u>WordPress Pre-Tender Funnel (Lead Qualifier)</u>

Designed to collect key details, qualify interest, and show pricing benchmarks before full portal login.

Progress Tracker & Navigation (Developer Notes)

- Add a visible % complete counter to all screens
- Add "Back" buttons throughout to allow answer revisions
- If user changes details after receiving a quote, do NOT regenerate a new quote to prevent misuse

Screen 1: "Tell Us About You"

Role Selector:

- I'm a Director Of A Residential Management Company
  - Optional field: Residential Management Company Number (Companies House API link)
  - If blank, display: "We'll need to confirm your company details before launching your tender."
- I'm a Leaseholder (Not a Director)
  - Option A: “I want to set up an RTM” → redirect to RTM Registration flow
  - Option B: “We already have an RTM” → prompt to provide RTM details and encourage contacting a director
  - Note: “We can't run tenders for individual residents without RMC/RTM Directors involvement.”

Leasehold Type (with icons):

- Purpose-Built Flats
- Converted House
- Mixed-Use Development
- Other (with optional free text field)

Block Condition (image-based):

- Excellent / Good / Fair / Poor

Outdoor Space (image-based):

- None / Some / Large shared space

Developer Note: After this screen, user clicks "Next" to continue to Screen 2.

Screen 2: "Your Location"

Postcode entry (with Google Maps/API integration):

- Match found: "Great news! We have XX managing agents covering your area."
- No match: "We don't yet cover this area – but we'll let you know as soon as we do!"

    - Store postcode & enter email for future campaigns if no match

Developer Note: On entry, show result message, then user clicks "Next" to continue.

Screen 3: "Your Block/Development"

- Number of Blocks: Dropdown (1–14+)
- Total Units: Exact number input
- Year Built: Dropdown: (Pre-1900 / 1900–1950 / 1951–2000 / 2001–2010 / 2011–2020 / 2021–Present)
- Current Service Charge Budget (optional):
    - Toggle: Fee per unit / Full block
    - Tooltip: "Used only to give Managing Agents an idea of the size of the budget they will be looking after. Helps them be competitive."
- Current Management Fee (optional):
    - Toggle: Fee per unit / Full block
    - Tooltip: "Including your current management fee allows agents to compare and quote more fairly. False data may reduce responses."

Developer Note: Once all fields are completed, display ballpark estimate. CTA appears: "Register Your Tender" (proceeds to Screen 4). Once a ballpark quote has been generated, the system must not allow a new quote to be displayed, even if the user goes back and edits any previous information. This is enforced by session lock. Additionally, if the system detects multiple submissions from the same IP address, or use of incognito/private browsing, it will not show a quote again. This prevents misuse and protects our pricing data from being accessed repeatedly by non-serious users or competitors.

Screen 4: "Register Your Tender"

Create Account:

- Name / Email / Mobile / Password / Confirm Password
- Full address (postcode pre-filled, editable but requires revalidation via Google Maps API)
- Block name
- Current Managing Agent (mandatory)
    - Tooltip: "This helps us avoid contacting your current agent during the process."
- SMSC Consent Checkbox
- CAPTCHA or "I'm not a robot" verification
- Email or SMS verification option

Developer Note: Once registered, auto-login and redirect to the RMC Portal (Stage 1).

<u>RMC Portal – Tender Activation</u>

On First Login – Developer Suggestions:

- Display a welcome message or short visual guide: "You're just a few steps from launching your tender."
- Show progress tracker
- Direct user to review and complete each stage

Stage 1: Review Your Details

- Show a summary of all previously entered information
- All fields should be editable
- Postcode change triggers new validation (linked to location radius logic)
- Add field for Company Number if not previously added

Stage 2: Select Your Priorities

- Interaction: Drag-to-order interface (or reorder arrows)
- Mandatory: User must interact before proceeding

Priorities (with short subtext):

- **Saving Money**
  I want to reduce my service charges and get better value for money.
- **Clearer Communication**
  I want regular updates and quicker replies from my managing agent.
- **Better Problem Solving**
  I want maintenance and issues dealt with quickly and properly.
- **Being Involved**
  I want to be consulted on important decisions about our building.
- **Proactive Management**
  I want potential issues identified and resolved before they escalate.
- **Higher Standards**
  I want a professional, consistent service that reflects pride in the block.
- **Clearer Financial Reporting**
  I want easy-to-understand budgets and breakdowns of what we're paying for.

Developer Note: Once reordered, CTA appears to move to Stage 3

Stage 3: Open-Ended Questions

- These questions allow proactive users to give useful context
- Add **AI Assistance Plugin**:
- Suggest phrasing, prompt for clarity, or generate example sentence structure
- Greyed-out example text disappears when typing begins

Questions:

Please note that your answers will be shared with managing agents as part of your tender results document. This document may also be shared with fellow directors or residents. We advise keeping your answers constructive, factual, and focused on the service you're looking for—not the individuals or company currently providing it.

This stage of the tender is anonymous. We do not share your name, property address, email, or phone number with managing agents. To maintain this anonymity, please avoid including your property manager's company name, block name, address, phone number, or email in your responses.

Developer Note: When responses are saved or submitted, implement a validation tool to cross-check and flag any use of the user's managing agent name, block name, postcode, town (from address), email, or phone number. If such data is detected, either:

- Automatically replace the content with [REDACTED], or

- Highlight the flagged text and prompt the user to revise before submission.

1. What service challenges have you experienced with your current managing agent?
    1. e.g. “We rarely receive updates about maintenance or upcoming works, and the accounts are often unclear or delayed.”
2. What would you like to see done differently by a new managing agent?
    1. e.g. “We want a proactive approach, clear billing, and proper consultation on major decisions.”
3. Are there any systems, tools, or financial reporting features that would improve how your block is managed?
    1. e.g. “An online portal to log issues and a clear budget breakdown would help us a lot.”

Developer Note: After submitting answers, confirm with a message like: "Thanks! Your tender is now under review. You will be notified when it goes live and when the results are in. Tenders typically run for 5 days. Quotes will start arriving soon."

Suggestions / Extra Developer Notes:

- Add a badge to dashboard post-submission: "Tender Live – Awaiting Agent Responses"
- Auto-redirect user to dashboard with short onboarding tips
- Make sure all buttons are clearly labelled for next/back navigation
- Use tooltips and microcopy to explain why data is needed

RMC Portal Suggestions – April 2025

Overview & Design Aesthetic

The SMSC RMC Customer Portal will serve Residents' Management Companies (RMCs) as a guided platform to run tender processes for selecting Property Management Companies (PMCs). It will integrate with Zoho CRM for user management and automation and adopt a clean, simple UI inspired by Barclays Bank UK's digital design. Key aesthetic traits should include simplicity, clear typography, plenty of white space, and strong visual hierarchy.

User Access & Login

- Each RMC will be granted one secure login by default.
- Zoho CRM will manage users and allow SMSC or the primary account holder to add collaborators (e.g. other RMC directors).
- Login page should be clean, minimal, and clearly branded.
- Security protocols should ensure encrypted access and timeout features for data protection.

Post-Registration: Initial Landing Page (Tender Activation)
Upon successful registration, the user lands in their dashboard that must guide them to answer the remaining questions to activate their tender:

1. Stage 1
2. Stage 2
3. Stage 2

Dashboard & Navigation

Once a tender has been submitted, the user is taken to a personalised dashboard. This dashboard should:

- Reflect the user's current stage in the tender process.
- Have a clear space designated for the report to be downloaded/viewed online when it becomes available
- Provide clear CTAs (e.g., 'Review Results', 'Shortlist PMCs', 'Continue to Video Calls').
- Display time-based metrics and key data points including:
    - Date the RMC signed up
    - Date the tender was submitted
    - Date tender is due to complete (based on tender type)
    - Time remaining until key deadlines
    - Number of PMCs who have submitted responses
    - Status of each tender stage
    - Provide status badges or progress bars indicating percentage completion.
    - Display real-time updates (e.g., 'Awaiting 2 more PMC responses').
    - Allow launching and managing additional tenders.
    - Offer a compact 'At a Glance' section.

Primary Navigation Tabs:

- Dashboard (default view on login)
- Results

- Shortlisted Agents
- Video Calls
- Site Visits
- Final Selection (Displays any agents that have had video calls or site visits and allows selection of agents.)
- My Answers & Archive
- Launch New Tender

Dashboard Card Grid Logic

The dashboard serves as the central hub upon RMC login. It should display a visual, grid-based layout where each card represents a stage in the tender process. This grid guides users intuitively and encourages progression. We need to add some functionality for the RMC user to give read only access to other directors of the RMC. The read only access will allow the additional user to view results and download reports, but not edit any information.

Each card should:

- Represent one tender stage.
- Change colour/state based on status: Active (blue), Completed (green), Locked (greyed out).
- Include real-time contextual info.
- Feature CTA buttons relevant to the stage.

Grid Layout:

- 3-column responsive layout (2-column on tablets, 1-column on mobiles).
- Modular cards populate based on Zoho CRM data.

1. Tender Overview

- Always active.
- Displays tender name/reference, type, submitted date, deadline (tenders run for 5 working days (Mon – Fri), etc
- CTA: “View Overview”

2. Results

- Active (once tender has ended and responses are in
- Display: “Your tender was sent to 120 PMCs. You have received 8 responses.”
- Show: “Tender ended on 24/04/2025” or “Results received on 24/04/2025”
- CTA: “View Results”
- Optional: Display a badge or tag like “Results Ready”
- Greyed Out (before results are ready):
    - Message: “Results will appear here once PMCs have responded and your tender has ended.”
    - Subtext: “You’ll be able to review all proposals anonymously once the deadline passes and agents have submitted their responses.”

This section must clearly show how many agents received the tender and how many responded. The “View Results” button should take the user to the Results tab, where they can view anonymised proposals side by side.

This stage should encourage anticipation and make it obvious that the user must wait for the deadline or responses to arrive.

3. Shortlisting

This dashboard box becomes active after the RMC selects PMCs from the Results tab. It provides a snapshot of shortlisted agents and prompts the user to proceed to the next stage.

Greyed Out (before shortlisting):

- Message: “No shortlisted agents yet”
- Subtext: “Shortlist your preferred agents from the Results tab to unlock this section.”
- Additional nudge: “You’ve had your results for 5 days — shortlist now to move forward.”
- Box appears faded until at least one agent is shortlisted.

Active (once agents are shortlisted):

- Message: “You’ve shortlisted X agents”
- Display a grid of up to 5 agents, each showing:
    - PMC logo
    - PMC name
    - Optional status tag: “Not contacted” / “Call booked” / “Visit arranged”
- If more than 5 agents are shortlisted:
    - Show: “+X more shortlisted agents” below the grid

CTA Button:

- “View & Manage Shortlisted Agents”
    - Clicking this takes the user to the Shortlisted Agents tab, where they can:
        - View full profiles
        - Book video calls and site visits
        - Track progress with each PMC

4. Video Calls

This dashboard box becomes available once the RMC has invited at least one PMC to a video call via the Shortlisted Agents tab. Until then, it offers contextual guidance to prompt user action.

GREYED OUT STATE – BEFORE AGENTS ARE SHORTLISTED

- Message:
  “You’ll be able to invite agents to video calls once you have shortlisted from your results.”
- No CTA needed here (shortlisting must happen first)

GREYED OUT STATE – AFTER AGENTS ARE SHORTLISTED BUT BEFORE VIDEO CALLS ARE BOOKED

- Message:
  “No video calls booked yet.”

- Subtext:
  "It's been X days since you shortlisted agents – invite them to a video call to help decide who to progress to a site visit."
- CTA:
  "Invite Agents to Video Call"
  → Takes user to the Shortlisted Agents tab, directly to the booking area for video calls

Note: If the user invites agents directly to a site visit (skipping video calls), this reminder should disappear automatically.

ACTIVE STATE – AFTER AT LEAST ONE VIDEO CALL IS BOOKED

- Message:
  "You've invited 3 agents to video calls."
- Display (in a compact snapshot format):
  - Next Scheduled Call:
    "SmartBlock – 27/04/2025 at 14:00"
    CTA: "Join Upcoming Call" *(visible only 15 mins prior)*
  - Last Completed Call:
    "Halo Property – 22/04/2025"
- CTA 1:
  "View All Video Calls"
  → Opens the Video Calls tab, where they can:
  - See history
  - Rewatch/see transcripts (if applicable)
  - Book follow-up calls/ invite agents who have had video calls with them to site visit
- CTA 2:
  "Invite More Agents to Video Call"
  → Takes user to Shortlisted Agents tab

The purpose of this box is to nudge them into deeper evaluation, while offering a simple view of where they stand.

DESIGN NOTE:

- The box must be static in height.
- Display max 1 upcoming + 1 recent call only; deeper detail lives in the tab view.
- If the user has skipped this stage (gone straight to site visits), greyed-out messaging should clear automatically.
- Any date-based prompts (e.g. "It's been 6 days…") should reset once a call is booked.

<u>5. Site Visits</u>

This dashboard box becomes active once the RMC has invited at least one PMC to a site visit, either from the Shortlisted Agents tab or the Video Calls tab as a follow-up step. Until then, it guides the RMC forward while reflecting where they are in the process.

GREYED OUT STATE – BEFORE AGENTS ARE SHORTLISTED

- Message:
  "You'll be able to invite agents to site visits once you have shortlisted from your results."
- No CTA required until shortlisting has occurred.

GREYED OUT STATE – AFTER SHORTLISTING BUT BEFORE ANY SITE VISIT INVITES

- Message:
  "No site visits booked yet."
- Subtext:
  "You shortlisted agents X days ago — invite them to a site visit to make your final decision easier."
- CTA:
  "Invite Agents to Site Visit"
  ⟶ Takes user to the Shortlisted Agents tab, directly to the booking area for site visits

Note: This nudge disappears if the RMC bypasses site visits and books a video call or appoints directly.

ACTIVE STATE – AFTER AT LEAST ONE SITE VISIT IS BOOKED

- Message:
  "You've invited 2 agents to site visits."
- Snapshot Display (static box layout):
  - Next Scheduled Visit:
    "SmartBlock – 29/04/2025 at 10:00"
  - Last Completed Visit:
    "Halo Property – 23/04/2025"
- CTA 1:
  "View All Site Visits"
  ⟶ Opens the Site Visits tab where RMCs can:
  - See visit logs
  - Update appointment details
  - Access PMC information
- CTA 2:
  "Invite Another Agent to Site Visit"
  ⟶ Returns user to Shortlisted Agents tab to book more visits
- CTA 3 (optional but powerful):
  "Appoint a Managing Agent"
  ⟶ Directs user to Final Selection tab

The purpose of this box is to reinforce progress and drive the user toward final decision-making, while keeping scheduling control in their hands.

DESIGN NOTES:

- Display maximum of 1 upcoming + 1 completed visit
- Static box height to ensure layout consistency
- Reset any "X days since shortlisting" nudges once a site visit is booked
- If an agent is invited directly to Final Selection (skipping site visits), greyed-out messaging should clear

6. Final Selection

Active (once at least one video call or site visit has taken place):
This section becomes available once any PMC has completed either a video call or a site visit with the RMC. All agents who have had one or both of these interactions should appear here.

Each PMC displayed should include:

- Company name

- Logo
- Shortlisting status (if applicable)
- Date(s) of interaction (e.g. "Video call completed on 22/04/2025", "Site visit held on 25/04/2025")

Each agent card must feature a clearly visible appointment button, e.g.:
- CTA: “Appoint this Managing Agent”

Once a PMC is appointed:

- Status should update to: “Agent appointed: [PMC Name] on [Date]”
- All other CTAs in this section should become disabled (to avoid multiple selections)
- A small confirmation message should appear: “Congratulations, you’ve appointed a new managing agent. We’ll now archive this tender.”

Also include a secondary CTA:
- “View Final Selection Tab”, which takes the user to the full Final Selection page (same layout and data, possibly with a bit more explanation or confirmation steps)

Greyed Out (before any interaction has occurred):
- Message: “Final selection unlocks after at least one video call or site visit is completed”
- Subtext: “Once you’ve had meaningful discussions or met with agents, you’ll be able to appoint your chosen managing agent here”

This is the critical end stage of the journey, and it must feel clear, conclusive, and easy to navigate. The user should feel confident they’re making a final, informed decision.

<u>7. Support / Help</u>

This can be a small pop up that you can click at the bottom of the page, or a floating box

Always active.
“Need help?” | CTA: “Browse FAQs” + “Message SMSC”

<u>8. Timeline Summary (Optional)</u>

This can be part of the dynamic bar at the top of the page if you think it will work.

Key milestones:
- Date registered
- Date tender submitted
- Expected results date
- Report delivery date
- Date Agents are Shortlisted
- Countdown to shortlist deadline (on Mgmt fee only tenders)
- Final selection date

FINAL REPORT REQUIREMENT – NEW SECTION (APRIL 2025 UPDATE)

In addition to the existing tender report (issued once the tender deadline ends), we now require a second, final report to be generated automatically once the RMC appoints a managing agent.

This final report must include:

- The original tender report (all PMC replies and financials)
- A summary of the full shortlisting journey, including:
    - Total number of PMC responses received
    - Number and information of shortlisted agents
    - Number and information of shortlisted agents invited to video calls
    - Number and information of shortlisted agents invited to site visits
    - Final selected agent

The last few pages of the report must clearly display this as a funnel-style visual, showing the narrowing process and decision journey. Ideally this should also be exportable as a branded, downloadable PDF, and viewable online in the Final Selection tab.

Permissions:

- RMC users and read-only collaborators should be able to view and download this final report.
- SMSC Admin should also have access to download it from the Zoho CRM or linked admin portal.

Design note:

- The report must match the clean, minimal SMSC aesthetic with clear headings, visual hierarchy, and legibility in both digital and print formats.

Additional RMC Functionality Requirements

The following features and considerations must be incorporated into the RMC journey to ensure flexibility, ease of use, and maximum value for leaseholders:

- In the Video Call and Site Visit stages, include an editable evaluation matrix that allows RMC users to weight decision factors (e.g. "up-to-date accounting" ×1.5, "weekly visits" ×0.5), using a scale from 0.5 to 1.5 in 0.25 increments.
- Allow RMCs to upload a full service charge budget that can either be anonymised using AI or manually edited by the user to remove any identifying information (e.g. company names and logos). This enables the RMC to share the most complete version of their budget with PMAs, resulting in more accurate and tailored replies. PMAs are more likely to respond when they can see exactly what the service charge includes, without bias toward the incumbent managing agent.
- If the RMC receives only 1–3 tender responses, offer the ability to retender by extending the tender by 3 working days and increasing the radius to 100 miles. If 4–6 replies are received, show the option with advisory text. For 7+ responses, retendering should not be offered.
- The platform must generate two reports for RMCs:
    - Report 1 at the end of the blind tender stage, showing anonymised responses and pricing, with initial pages explaining the tender process.
    - Report 2 at the end of the selection stage, capturing the full journey from tender launch through to appointment.
- Enable the RMC user to invite additional residents or directors into their portal with read-only access.
- Map verification must be enforced at registration to confirm block location via a Google Maps pin (used for radius-based tender logic).
- Include an AI-powered drag-and-drop upload feature for service charge budgets. The AI must redact managing agent information and reformat the document into a clean, numerical-only version for PMA visibility.

- Include an AML check and fire door compliance check as part of the RMC onboarding or questionnaire.
- Ensure the question system is modular and easy to update. All changes to questions must also be reflected in the PMA response view.
- When an RMC shortlists a PMA, display a popup explaining that their contact details will be hidden for 3 working days to allow them time to initiate video calls. Include a countdown timer and an optional “Extend by 3 Days” button (only available once), with reminder emails if no action is taken.
- In the selection stage, enable RMCs to leave written feedback for PMAs they shortlist but do not appoint. This feedback is visible to the PMA post-selection.
- Messaging between RMCs and PMAs is only available after shortlisting. All messages must remain within the platform and be limited to shortlisted pairings only.