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# Remote Working for Property Professionals

1. Workflows and Tools
2. Team Engagement



# Your hosts for today

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Sam is a Senior Consultant at Re-Leased and a technology specialist in the commercial property sector. Sam has deployed tech suites to some of the largest managing agents, Landlords and REITs across the UK.

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Specialising in creating teams, nurturing culture, and change management. PJ has built a career in the tech industry over the past 14 years, 6 of which she spent in PropTech.

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# Cloud: Workflows and Tools

1. Challenges
2. Impacts
3. Outcomes



# Client and Tenant Communications Plan

## 1. Outgoing Communications

- COVID-19, vacating premises, deliveries, general comms
- Templates: Tenants, Clients Contractors
  - Email: Continuity during COVID-19
  - Support for vulnerable tenants
  - Tenants lease and rent queries: standardising replies
- Bulk email, MailChimp, WhatsApp, SMS



**Takeaway:** Over communicate



COVID-19 Templates in Re-Leased as of Fri



# Client and Tenant Communications

## 2. Incoming Communications

- **Requests Maintenance**, compliance
- FixFlo, Google Sheets, Google Docs
- **Contractors** - Issuing work orders, safety

## 3. Internal Communications

Finance and Property Management  
Senior Management

**Slack, Microsoft Teams,  
Hangouts, G-Suite, Zoom**



**Takeaway:** Enabling an efficient process for your stakeholders to continue engaging with you is key



Take advantage of the Re-Leased Tenant App



# Having Access to Vital Information

## 1. Tenant details

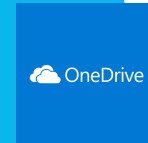
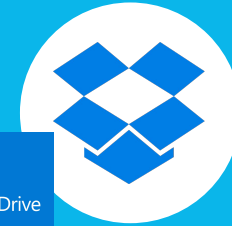
- Email, phone, lease information
- Google Sheet, remote VPN

## 2. Documents

- Leases, supplier contracts, compliance
- Dropbox, Google Drive, OneDrive

## 3. Clients

- Contact info, contractual agreements



**Takeaway:** Have a single source of truth between your team



Remember you can set user permissions



# Receipting and Tracking Rent

1. Keeping track of who has paid and any payment plans with tenants
2. Online banking and authorisation: screen sharing - Hangouts, Zoom, Microsoft Teams
3. Remote access: Xero, Sage, Dynamics
4. Client accounting in the cloud
5. Short term - long term
  - Google Sheets/Docs
  - Cloud based accounting
  - Email chasing/Phone call logs
  - Stripe / GoCardless

The Stripe logo is displayed in blue lowercase letters within a white circular background.The GoCardless logo is shown in blue uppercase letters within a white circular background.The Xero logo is displayed in white lowercase letters within a blue circular background.

**Takeaway:** Getting insight to expected cash flow is key

A white question mark is centered within a blue circular background.

Create COVID-19 Note Type >  
Makes it easy for reporting

The text "Re-Released" is written in white within a green circular background.

# Supplier Invoice Approvals

- Online approvals: can't be paper based
- Hellosign / DocuSign
- Complete workflow tools:
  - FixFlo/Re-Leased: requests - instruct - tenant - invoice - approval - payment

## Invoices

- Approval Max
- iCompleat
- Integration with account codes and service charge schedules

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**Takeaway:** A paper option is no option, use tools to enable virtual signing / approvals



Bulk processing, drag and drop





# OPERATING WITH A CLOUD REMOTE WORKING STRATEGY

Move all data and software into the cloud for streamlined operations and create additional value-adds to clients.



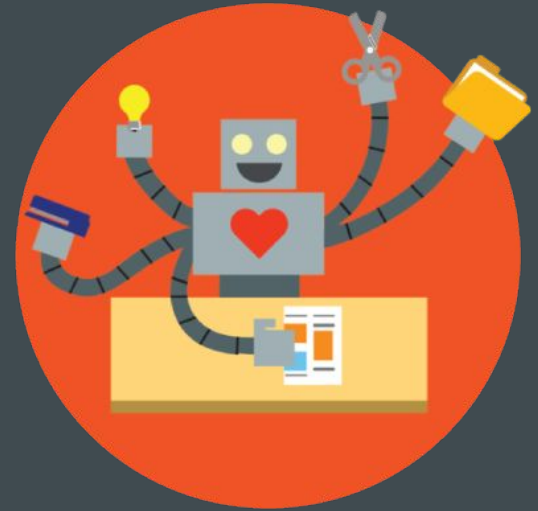
# Creating an engaging working from home culture

Productivity, Team  
Engagement, and  
Endurance



# The Team: Productivity

- **Workspace**
  - Get a dedicated space
  - Optimal environment
  - Plenty of natural light
- **Routine**
  - Incorporate parts of your old routine
  - Remote working means different steps
- **Plan**
  - Break day into sections
  - Share the plan
- **Breaks**
  - Replicate micro breaks
  - Acknowledge your bodies hints



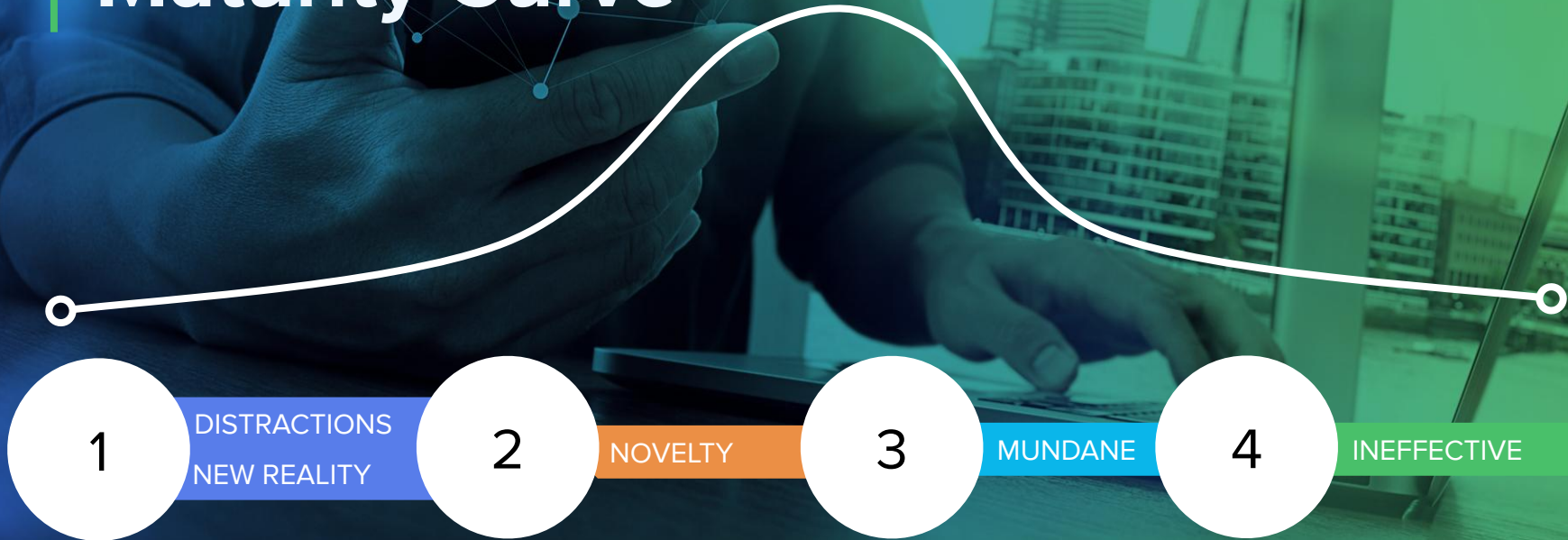
# The Manager: Team Engagement

- Over communicate to set expectations
  - Video to increase human touch
  - Goal setting
- Work visibility
  - Get everyone on the same page
  - Collaborate as a team
- Trust your team
  - Play to your team's strengths
- Reward & recognition
  - Reinforce positive behaviour
- Care for your team
  - Don't forget the human aspect
  - Encourage social behaviour



The Business: Endurance

# Remote Working Engagement Maturity Curve



A person is shown from the chest down, wearing a dark long-sleeved shirt. They are holding a smartphone in their left hand and typing on a laptop keyboard with their right hand. The laptop is open on a desk. In the background, a window shows a cityscape with several buildings. A semi-transparent network diagram with nodes and connecting lines is overlaid on the scene, centered around the smartphone. The entire image has a blue and green color gradient overlay.

**Resources for you**

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**Thank  
you**  
Questions?

