LANDLORD Client Journey

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Pre-Care

Landlord Timeline

Research
Investor gathers research data and forms opinion of the agency of choice

Contact
Investor makes contact with agency (email, phone, walk -in, social media)

Appraisal
Investor invites Property Manager to appraise property noting agency professionalism and knowledge

Property Manager Action

- Use ActivePipe predictive data analytics that tell you who is ready to transact so you can close more deals and generate leads

- Property Manager responds within 24 hours (usually sooner)
- Demonstrate understanding of needs and expectations by qualifying investor (e.g. property history, property details, price expectation, expected listing date)
- Check on BusinessBase if agency has any history with this client

- Check legal ownership
- Send digital pre-list kit in advance
- Appraisal of property performed
- Property Manager comes prepared with marketing options, offers investor's personal connections for the best deal and CMA report
- Property Manager is attentive to investors needs and expectations
- Offer Landlord insurance options and provide forms through EBM
- Follow-up post appraisal
- Formal letter sent presenting rental opportunity
- Offer owner a building & Pest inspection of asset to determine current status with Before You Bid
- Discuss with Investor if they have explored their options around reducing monthly costs on debt to maximise rental returns with Strategic Investment Group

Intra Care

Landlord Timeline

Listing
Investor makes decision to list or not

Marketing
Confirm marketing strategy to rent property, lease terms to be offered and agreed on rental figure, pets and garden/pool maintenance, emergency tradespeople

Rent
Investor expects ongoing communication about prospective tenants

Property Manager Action

Yes
- Management agreement received and signed
- Thank you letter sent (co-signed by Principal, Property Manager)
- Client Services arranges listing gift
- Qantas Frequent Flyer offered
- Verbal follow-up of Landlord Insurance offer
- Landlord Placement survey sent
- Confirm compliance items:
- Smoke alarms
- Insurance
- Pools
- Windows/blinds
- Safety switches
- Asbestos
- Emergency repairs
- Free from health and safety hazards
- Send out property investor video

No
- Thank you letter sent
- Lost listing survey sent

- For lease sign installed within two days of signing
- Professional photos taken and copy written
- Property is listed across multiple online and offline mediums
- Private viewing and/or open inspections arranged
- Weekly report sent to investor until property is leased
- Phone updates twice per week
- We are most at risk of losing a management while the property is vacant or the tenant is in rental arrears. Solid communication is imperative (because your competition will be calling)

- Qualify rental enquiries
- Screen tenancy applications
- Reference checks conducted - can the tenant:
  i. Pay the rent?
  ii. Maintain the property?
- Suitable applicants are put forward to investor
- Property Manager may be involved in negotiations between investor and tenant
- Upon selection of tenant, a tenancy agreement is prepared and signed with agreed rental amount within two working days
- Bond and rent payment requested at signing
- Holding deposit requested (usually equivalent to one week's rent - note local legislation)
- Cut keys

Future Management

Landlord Timeline

Property Management
Investor receives regular communication and updates on rent payment, repairs and maintenance and inspections

End, Sell or Continue
Investor will either end management agreement, sell property (refer to vendor journey) or continue

Property Manager Action

- Manages rent payments and banks money into nominated account
- Funds are disbursed to investor as per management authority
- Advises investor of any rent arrears and appropriate steps (check insurance policy)
- Rent Statement sent at end of month
- Urgent and non-urgent repairs and maintenance managed to completion according to investor instructions and approval
- Repairs and maintenance completed by licensed and insured tradespeople with invoices issued to investor
- Invoices paid on investor's behalf (e.g. property compliance, insurance council rates)
- Periodic inspection completed, as per management authority instructions
- Review of tenancy agreement and rent payable 90 days prior to expiration and communicated between investor and tenant
- Ingoing/outgoing inspection completed at change of tenancy
- Property Manager and Client Services makes regular "WOW" calls to investor to assess client issues, satisfaction and experience

- Offer 12 monthly Building & Pest Inspection to maintain asset (and avoid potential significant issues at sale and corresponding blame to property management team/agent)
- Offer Investor opportunity for a financial health check and wealth creation strategy on how to continue to build wealth or save on expenses

- Property Manager receives notice of intention to end, sell or continue
- Offer Investor opportunity to have a health check before making a financial decision

End or Sell
- Call investor to confirm
- Email either Lost Management and/or Landlord Exit survey
- Property Manager and/or Client Services introduces investor to sales agent
- Property Manager contacts outgoing tenant
- Tenant advised

Continue
- Email Landlord Loyalty survey
- Property Manager and Client Services send anniversary card and gift
- Maintain ongoing support, communication and commitment to investor throughout client life cycle

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THE POWER OF AN IDEA IS IN ITS IMPLEMENTATION