Investor **Client Journey**

♣ Future Management

Pre-Care

Research

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

Property Manager

Investor

Timeline

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

Contact

Investor makes contact with agency (email, phone, walkin, social media)

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

Appraisal

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

• 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 a 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

ntra Care

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 Management

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

End, Sell or Continue agreement, sell

Investor will either end management property (refer to vendor journey) or continue

receives notice of

or continue

Offer Investor

intention to end, sell

opportunity to have a

health check before

Action

- property details, price expectation, expected
- history with this client

- Management agreement received • Lost listing survey 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

- Thank you letter sent
- written • Property is listed across multiple online and offline mediums

• For lease sign

days of signing

taken and copy

installed within two

Professional photos

- 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
 - Holding deposit requested (usually equivalent to one week's rent - note local legislation)
 - Cut keys

- Manages rent payments and Property Manager 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

- making a financial
- End or Sell • Call investor to confirm

decision

- Email either Lost Management and/or Landlord Exit survey
- Property Manager and/or Client Services introduces investor to sales agent

Offer 12 monthly Building

avoid potential significant

corresponding blame to

Offer Investor opportunity

check and wealth creation

for a financial health

strategy on how to continue to build wealth

or save on expenses

property management

& Pest Inspection to

maintain asset (and

issues at sale and

team /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













