Podio Property Management Workflows

Ben Sencenbaugh – The Realty Medics

Identifying the Workflows

- Identify the top of the funnel
- What are the main process steps? (not work instructions)
- Did you identify where a mistake could be made? Is there a status for each process step and due date?
- What, if any, are the interactions with other departments or workflows?

Why did we select Podio?

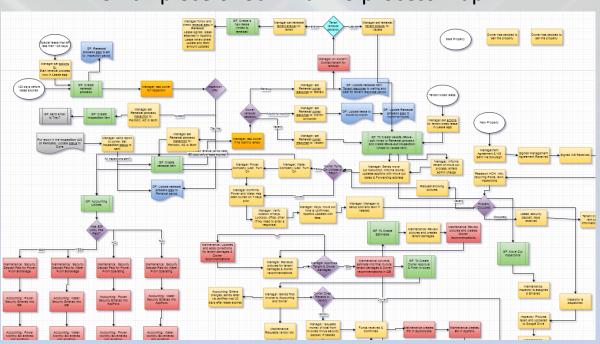
- It was fully customizable
- No limitations with API
- Affordable
- Easy to implement
- Owned by Citrix
- Developers available in the market, but basics can be easily learned

Developer or Do It Yourself

- Start by writing the workflow framework (we used draw.io)
- Then hire a developer to follow workflow
- It will be difficult to find a developer who knows your industry, so spend some on the workflow so it is detailed and easily understood

Developer or Do It Yourself

Small piece of our Draw.io process map



Examples of Podio Process

Lease Renewals to Vacant to Move Out Process

- Import lease expiration information AppFolio
- Offer Inspections (Property Inspection & A/C Check 120 days out)
- Ask Owner if they want to renew and suggest a price (90 days)
- If Owner offers a renewal, then offer renewal to tenant (>40 Days)
- If Tenant accepts, follow to-do's to get lease signed and uploaded to AppFolio and enter renewal fee and complete process
- If Owner or Tenant decides to Vacate, then the Vacant process is initiated

Examples of a Podio Process

Lease Renewals to **Vacant** Process to Move Out

- Pre-Move Out To-do's. (Move out instructions, forwarding address, etc.)
- Turn on or verify utilities, related accounting tasks initiated (>3 days)
- Where are the keys going to be returned, lockbox code and time
- Carpet cleaning receipt received, forwarding address
- When keys have been confirmed (Move Out Inspection Process is initiated, as system verifies utilities have been confirmed)
- Start pool and lawn service if needed

Examples of Podio Process

Lease Renewals to Vacant Process to Move Out

- Move Out Inspection assigned and scheduled
- Lockbox code provided from vacant process
- Special Instructions for the move out. (Check for this, owner concerned about...)
- Text sent to inspector and issues are documented with iPhone pictures and sent to Podio
- PDF Issue report is automatically created to provide to Owner from iPhone pictures
- Task is assigned to inspector, so when back in the office, upload SLR pictures to cloud
- Verify report and complete

Process moves to Tenant Damages. We can now complete tenant damages estimate real time and send report to Owner in the same day.

Growing Pains

- Constant monitoring for issues took a ton of time
- Employees did unexpected steps and had to implement controls
- Ensure you receive employee buy-in when creating workflow before changing their process
- We rolled out one process at a time and tested, tested, tested
- Nothing talks with AppFolio, so that is a huge challenge

Costs?

Our direct labor is 32% of our Income.

- Huge Efficiency/Labor savings. The staff only has to follow each Podio process and provide awesome customer service.
 - Podio costs ~\$20 per month per user
 - Development costs depends on complexity ~\$1000-\$3000 per month

Take the time to identify your process workflows before you develop

Thanks!

The Realty Medics
Ben Sencenbaugh
Ben@TheRealtyMedics.com