

Podio

Property Management Workflows

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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

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!

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