Business continuity and success

with Ray White Rockhampton

Cassie Sparks is the Operations Manager of Ray White Rockhampton, a high-performing office managing around 1000 properties. As the nerve centre of the office, responsible for overseeing the property management team and program changes, Cassie was a key player in the migration of the office from Gateway to Console Cloud.

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Ray White Rockhampton's property management team pride themselves on achieving maximum financial returns for their investors through strict arrears policies, priority access to market intelligence, and industry-best standards of staff training, education and resources.

That reputation could have been at risk during the migration process—if the transition wasn't smooth, their owners would feel it.

As it turns out, Ray White Rockhampton's transition to Console Cloud was a successful one—not without the odd hiccup, but where any hiccups were managed easily and to Cassie's satisfaction. This success would not have been possible without the preparation and input by Ray White Rockhampton, and their partnership-type relationship with Console Cloud's implementations team.

We caught up with Cassie about her team's transition to Console Cloud, and for some frank advice to other offices managing similar or smaller portfolios considering making that change.

Cassie Sparks

Operations Manager
Ray White, Rockhampton, March 2020

When we embarked on this journey, we knew a few things: we wanted an improved EOM experience, we wanted to give the team more flexibility, and we wanted a system that was designed to be at the cutting edge for property management in 2020, not 2001. For us, the question was not whether we would move to a cloud-based platform: it was which one?

The challenge of change: bringing your team on the journey

At first, when I was looking for new software, a lot of people on my team were a bit of the "Why change what works?" mentality. Some staff were really nervous about needing to learn to use new software. But then we had a demo of Console Cloud to see what it was actually capable of. The demo was detailed and helped alleviate any fears that most of the staff had.

And once the team started playing around in Console Cloud, it pushed the rest of them over the line. Console Cloud pretty much sold itself after that. They all love it now. The team regularly comments on how much they love different features.

As a busy office with predominantly long term server-based software users, it was a scary step committing ourselves to such a massive change. But tight from the moment we made that decision and locked it in, everything fell into place for us.

Onboarding: Ray White Rockhampton makes the move to Console Cloud

This was helped greatly by the Console Cloud support team, whom we refer at our office as the 'A Team'. First we have Andre who is our account manager and he helped get us moving. We were then assigned Alex for implementations and onboarding (another A for the A Team). Alex made the process so easy and stress-free for us. He really stepped through what needed to be done to prepare, and broke it down so it all felt super manageable. And it was: we got through it easily.

How lucky we are to have changed to Console Cloud when we did! If we were still on server-based software, we would be facing a very different situation right now.

— CASSIE SPARKS

Challenges of migration

Of course, while plenty of things are way easier and better than expected, some things will always be a little more painful in the short term. That's the nature of change. For us, the tenant trial balance doesn't give the option to exclude tenants who have a zero balance, as an example. There were also some other issues initially, however, we're pleased to report they've been resolved through updates since.

But on the whole, onboarding was SO EASY. Put it this way: I managed the entire process by myself. I'm a pretty busy manager, so I think that speaks to how efficient it was. I mean, I even checked and changed every single owner/property and tenant file. I wouldn't recommend that to anyone, but that's honestly how easy it was.

It was a straightforward process, made even better by our implementation guy. He was great, and extra credit to him for putting up with me and my deluge of emails! I asked a lot of questions of him, and he just fired back all the answers cheerfully and without delay.

I also processed EOM on the weekend and shot the required information through to him on Sunday to prep for our go-live date on Monday. He did everything on that Sunday! Seriously, how good is that? So we were able to go live on Monday without a problem. It was impressive.

How to prepare for your own migration

When you get the month trial, you need to go hard. Play in that sandbox as much as you can and do everything you can think of! Seriously, this is the best time to get your hands dirty and make mistakes. I would also recommend you speak to other offices that have Console Cloud. They'll usually be super helpful too.

And training? Don't even second guess getting the training package. Do a few hours of training before you transition, a few right after and then save some for later. That's what we did, and we made the right call.

But really, just do it—make the choice to migrate to Console Cloud. Yes, there are going to be differences and some things take longer to do at the start, at least initially. But on a whole the time saving and de-risking of your business will have increased at least tenfold.

Third party apps and integrations

Console Cloud is also partnering with so many other great third party apps and programs too—which brings us to the final member of the A Team: Andy. Andy is a member of the Console Cloud product team who is personally helping us with an integration of another platform we use in the office with Console Cloud. Being able to trial that relationship and give feedback directly to Andy has been great.

The result

The team is so happy with the change, and we come from an office of long-term gateway users who weren't really into the idea to begin with. Once we migrated, it quickly became evident that we had chosen software perfectly for our office. Within the first couple weeks changes were released which improved the platform, and we learned that the Console Cloud developer team actually listens to property managers. It's exciting to know that we are part of how this platform grows.

We actually find ourselves questioning why we stayed away from Console Cloud for so long. We have saved a heap of time in all areas of property management by making this move. The time savings on trust accounting tasks alone is mind boggling. Plus, the flexibility to work remotely is a massive bonus!

Here are some other differences, time-savings and things I've noticed.

Workflows and productivity

We love how the workflows really do away with our need for manual things like checklists and extra bits of paper. It's [that is, all info relating to tenants, owners, properties, creditors etc is] all recorded in a simple visual timeline that's easy to see. It makes information easy to find and tasks easy to follow up on. It means anyone in the office can jump on and get up to speed in the event that the PM dealing with it is away or out of the office.

There are also some really genius hacks, like recording a rental reference for a vacating tenant to make future life for us easier. Little things like that seem so simple, but they're actually life-changing for us.

Plan for the future

It's possible that there are other platforms out there more advanced than Console Cloud, but the road map of future features and upgrades was really exciting for us. We could also see that they've been holding themselves accountable and delivering on that roadmap pretty consistently in their quarterly release webinars for more than a year now.

We figured we could tolerate some pain in the short-term because we could see how rapidly Console Cloud is growing, adding, changing, and improving. But just to be sure we were making the right call, we spoke to some other Ray White offices who were long term Gateway users like us and had moved to Console Cloud (or other platforms) and got their feedback as well. That gave us the extra confidence we needed to know our decision was the right one.
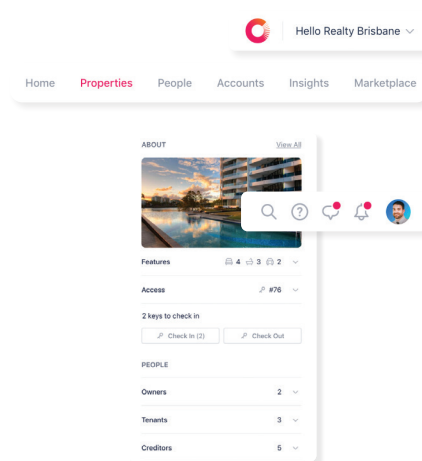
Work remotely

While I've been able to work from home for some time, it had previously been with clunky remote access to my work desktop. Console Cloud made this a lot easier and simpler. Just login via **www.console.com.au** and your office is right there.

This has given us a sudden advantage, with COVID-19 hanging over our heads. We are able to mobilise staff to work from home at any given moment and not lose productivity. When I think about the natural disasters we regularly face in Australia (and its impacts on this industry), it brings me a sense of ease to know we've planned for it. And we're seeing the results of that plan, right now.

Arrears

Arrears: the workflow makes this way easier to manage. And we mean easier in every way. We communicate with tenants via the workflow and everything is recorded. If a tenant is in arrears 1 day today and still in arrears in 7 days time you can see so easily at a glance everything you've done during their time in arrears. Arrears really used to take up a lot of our PMs' time, so to have that kind of automation has been super helpful.

Vacates

Vacates: same as above. It makes it so much faster to manage, having all the information you need combined and in one location (the visual timeline). We used to have what we thought was a great process, but it was paper-based and had a lot of room for human error. This new process is all in your face, which makes it so clear, so efficient and just so much easier.

Property managers are busy enough as it is, without all the paper wrangling to find answers. It's so good being up to put notes on the screen in the vacate workflow explaining what's due to be sorted for vacate/outstanding money etc.

Receipting and EOM

Receipting and EOM: this is part of my job and this is by far the most incredible change in Console Cloud. It used to take like 17 years to do a backup before/after I processed EOM, still leaving time to do a trip around the globe while waiting for all the reports to generate. It was so clunky and manually intensive. I used to dread it.

Now, EOM in Console Cloud is done in fewer than 10 clicks of the mouse, and takes less than five minutes to do it. It's just so much faster, so much easier, so much better in every way.

Receipting is also incredibly efficient. Emailing receipts is cost and time effective, and easy. Matching off payments in a bulk receipting import where they have failed to match themselves is so much easier too. It's all on the same screen—just a click, and the problem is solved.

Indicators of success

I estimate we've gained a day in admin per week across the office just by making the switch. Property managers love it because it's reduced their workload. They can also answer questions for other property managers easily when someone calls, because they can see all the relevant information organised in tenant, property, and other tabs within Console Cloud. I love it because it's given me back hours in my day that used to be spent doing trust accounting. Seriously, hours.

We also use less paper now and email receipts (hello, 2020!) and there's generally a lot less paper shuffling happening around the place.

Business continuity in the shadow of COVID-19

I am proud of the Ray White Rockhampton team. They are handling the COVID-19 crisis exceptionally well, and ensuring they continue to go above and beyond for our clients. They are prepared for whatever comes next. And with Console Cloud, they can continue to work from home if/when they need to. Everything we have in our office is now cloud-based, which means we can work anywhere that has an internet connection.

How lucky we are to have changed to Console Cloud when we did! If we were still on server-based software, we would be facing a very different situation right now.

Cassie Sparks, Operations Officer

Ray White Rockhampton
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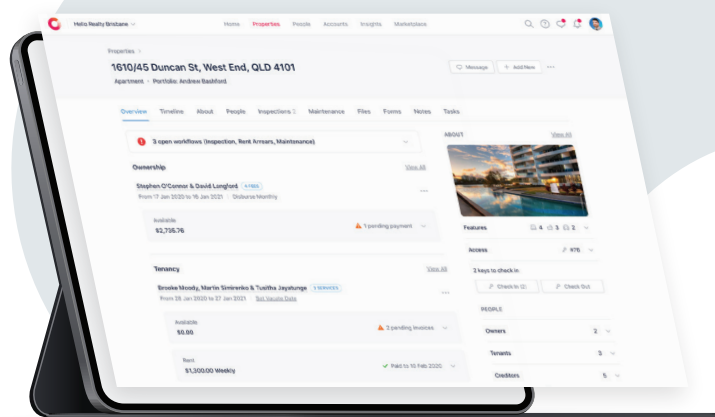
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