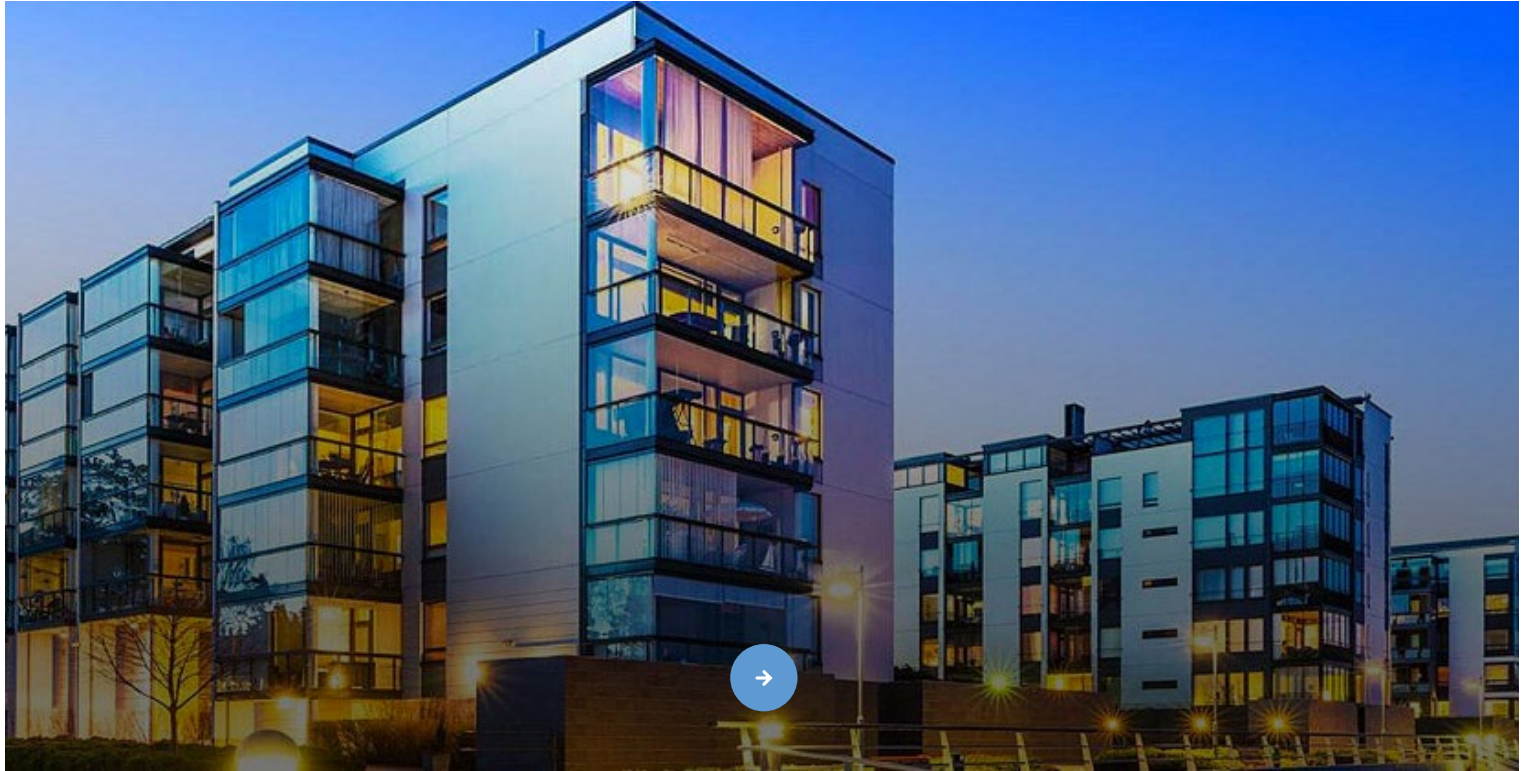




Touchstone

property management



Residential Portfolio Management.

Helping in all aspects of managing client portfolios



Client Services

From marketing and reporting to Prop Tech and communications, we'll help you to continually innovate your property portfolio.

We tailor our services for each client's requirements, offering everything from a full lettings and management service, through to white-label services. Whether we're operating through an on-site team or not, we offer:

- Appraisal
- Set up
- Customer Management
- Health, Safety and Compliance
- Data & Reporting

- Financial Management
- Building Management
- Marketing & PR
- Risk Management
- Disposal and Transfers





Managing Performance Services

Data is the window on performance.

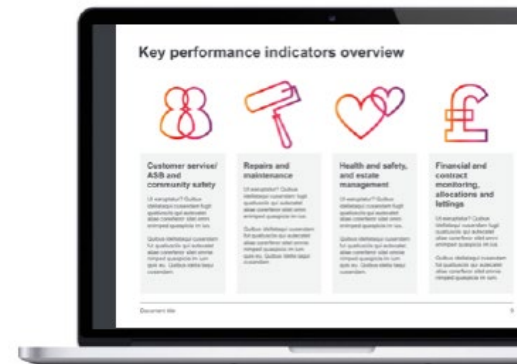
We'll take time to create a reporting structure for you that delivers fact and insight.

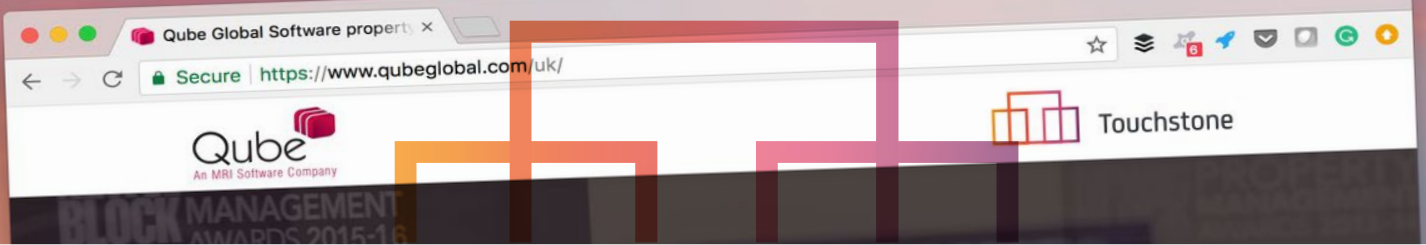
We report operational and financial activity in a wide range of formats, all aimed at providing a 360 degree view of your property assets.

We can report at a transactional or aggregated level, showing performance in your key areas of interest. We will provide core financial data to accompany the net transfer of funds at the end of a period, while offering more detailed operational reports including trend activity and commentary.

Our reporting will underpin a deep understanding of your portfolio as it grows and help to develop strategy and policy.

We can also provide direct access into our systems to allow interrogation of data and some specific supported reporting.





Systems

Qube has been our preferred partner for 20 years. We have invested in creating a flexible and robust system through solutions including Qube PM and Qube SLM.

Qube PM is a modular and hierarchical database. It is our primary system for all aspects of property management, KPI reporting, compliance and financial data.

Key elements:

- An integrated document management system allowing all tenancy documentation, works orders, invoices and other important items to be saved with links to the relevant unit.
- A comprehensive diary management system which ensures all rent reviews, lease end dates, gas safety checks and other compliance items are fully controlled.
- A workflow system which controls the processing of tenancy documentation and maintenance ordering.

Qube SLM software enables us to control content and details of vacant units advertised on the main property portals and report on all activity. The system creates records of any interested party, including a record in the Qube PM database for all potential applicants. This record is developed as references are processed, the agreement is negotiated and documents produced (for online signature) and the corresponding deposit registered.





Systems

We're happy to develop and manage our own property-specific websites where we're managing lettings in-house, and can do this as a white label under a client brand.

Our 'concierge' style portal delivers a complete online journey for communicating and interacting with customers:

- Customer document storage, statements and payments.
- Maintenance reporting via Fixflo plus diagnostic software
- Additional customer specific services – such as cleaning, laundry services
- Local information - such as transport links, retail and leisure offers, local events
- Digital welcome pack

As part of the Places for People group we are testing new innovations, with current development of wearable technology, 'linked' boilers and various sensors linked through a LORA network to monitor a range of conditions in a property. This could help to identify and fix a problem before a customer even knows it's there.



Compliance & Risk Management

Our systems, processes and external accreditations offer complete peace of mind. Our management falls into three main areas:

Memberships and Insurance

- Full range of industry memberships
- RICS audited for all client accounting activity
- £10m PI and PL insurance cover

Compliance

- A central compliance team for all operating legislation requirements
- Membership of a central group H&S steering committee
- Range of client-led H&S and administration audits
- Group-led 'external' audits

Business Continuity and Assurance

- A tested business continuity plan
- Remote access for all staff to a central group server
- Robust and compliant policies for Anti-bribery, Data Protection, Money Laundering
- IT security – ISO 27001 and 9001
- Formal complaints-handling software
- Contentious issues register
- Environmental – ISO 14001 and 50001

