Experience Management

Dream it! Begin it!

David Watson CCXP | FCX-PRO
GM CX, Systems & Innovation
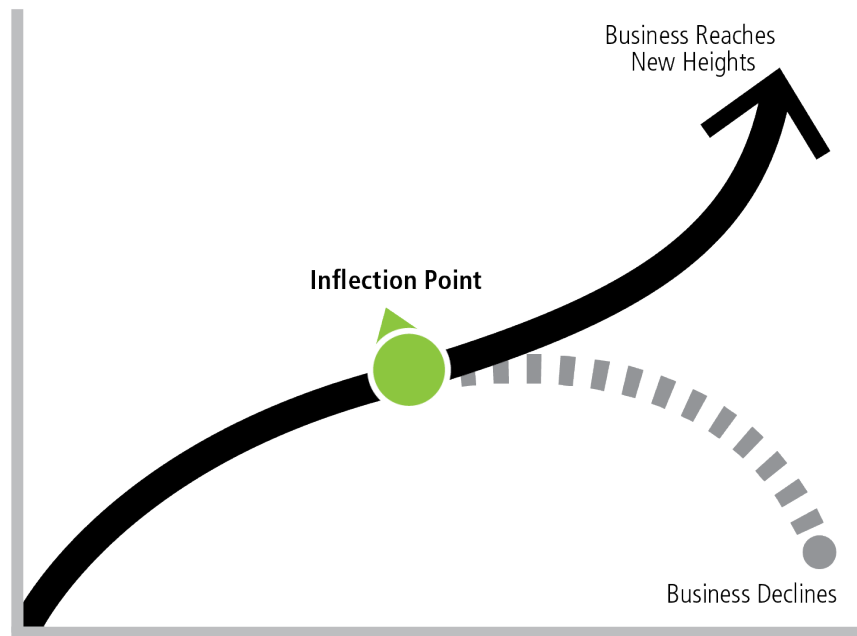
M𝖼Grath

Buyers – Sellers Landlords - Tenants

Everyone has a Real Estate story

Business Reaches
New Heights

Inflection Point

What got you here,
won't get you
there

Business Declines

– Only the Paranoid Survive by Andrew Grove

A strategic inflection point

is a time period when an organization must respond to disruptive change in the business environment or face deterioration.

McGrath

Provide **an unparalleled** real estate **experience for our customers.**

People SAY
McGrath

Delight
(Satisfaction + Advocacy)

Train & Develop			**Develop People** Employer of Choice	**Improve + Innovate** Work smarter			Improve existing
Reward & Recognition		OUR BHAG			OUR BHAG		Innovate new
Listen (VoC)		OUR BHAG	**Delight Customers** Lead in NPS	**Grow McGrath** 9000 PUM	OUR BHAG		Acquire new business
Insights							Retain existing business

Data   Technology   Culture   Lean Ops

Keep it real…
Only Customers can say if we're delivering the vision.

A plan…
That people can believe in and own.

A plan that aligns, inspires and drives the organization to prioritize initiatives that support the vision.

McGrath

CX VISION, VALUES + STORIES

"Love Real Estate"
will be the visual reference for McGrath
internal CX & Transformation campaigns

Staff stories
What does CX means to you? | Why it's important? | Hero stories

People **SAY**
McGrath

We deliver real estate
experiences that are:

Simple
Authentic
You can recommend it

People **SAY**
McGrath

Passion for **real estate**;
and the community we work in

Passion for **people**;
our customers, staff & suppliers

Passion for **excellence**;
an obsession to do better!

That's why people **SAY** McGrath

People **SAY**
McGrath

"We've always been
focused on the
customer...
it defines who we
are and how we
work individually
and as a team.

John McGrath
Founder & Executive Director

CX VISION

CX VALUES

YOUR CX STORY

Diagnostic tool and article available on
Qualtrics Masterclass | XM Institute
Author: Matt Nelson | July 11, 2017

Bruce Temkin, CCXP · 1st in
Experience Management & Leadership Visionary, Keynote
Speaker, Strategic Adviser, Researcher & Co-Founder of
CXPA.org

feasible
world class platform

desirable
robust methodology

viable
scale with the business

McGrath
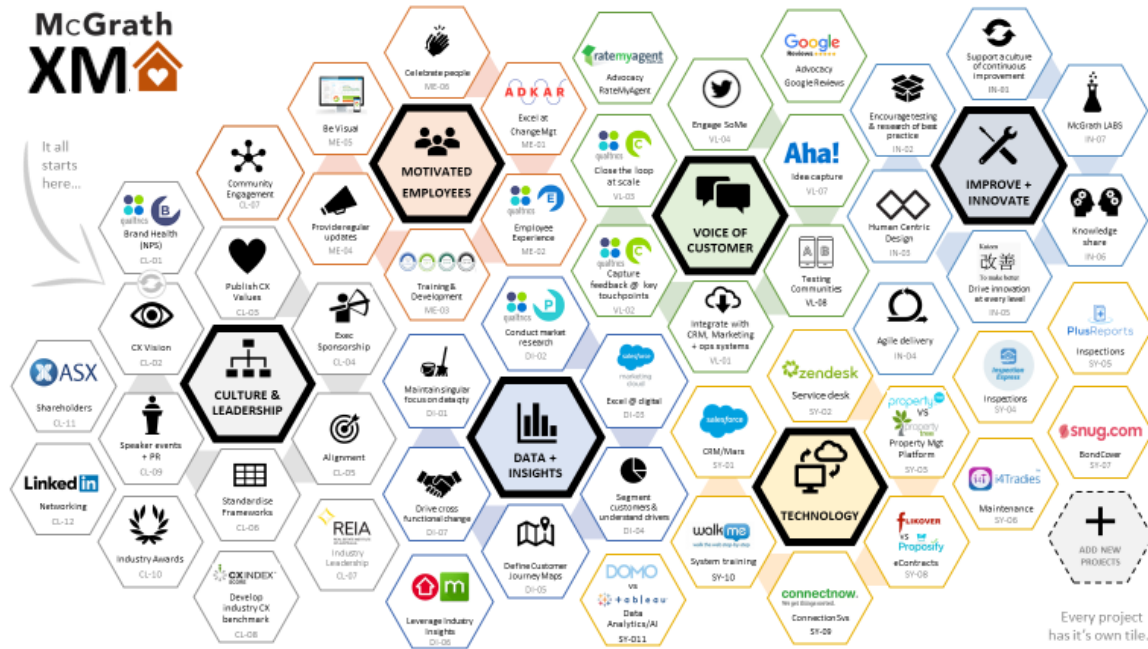
50 projects

McGrath

When

Why | What | How | **When** | Who

Delight Customers

Lead in NPS

McGrath XM

Core Capabilities

- Culture & Leadership
- Motivated Employees
- Technology
- Voice of Customer
- Data + Insights
- Improve + Innovate

Prioritisation of projects based on:
Customer & Business benefit, Feasibility & Risk
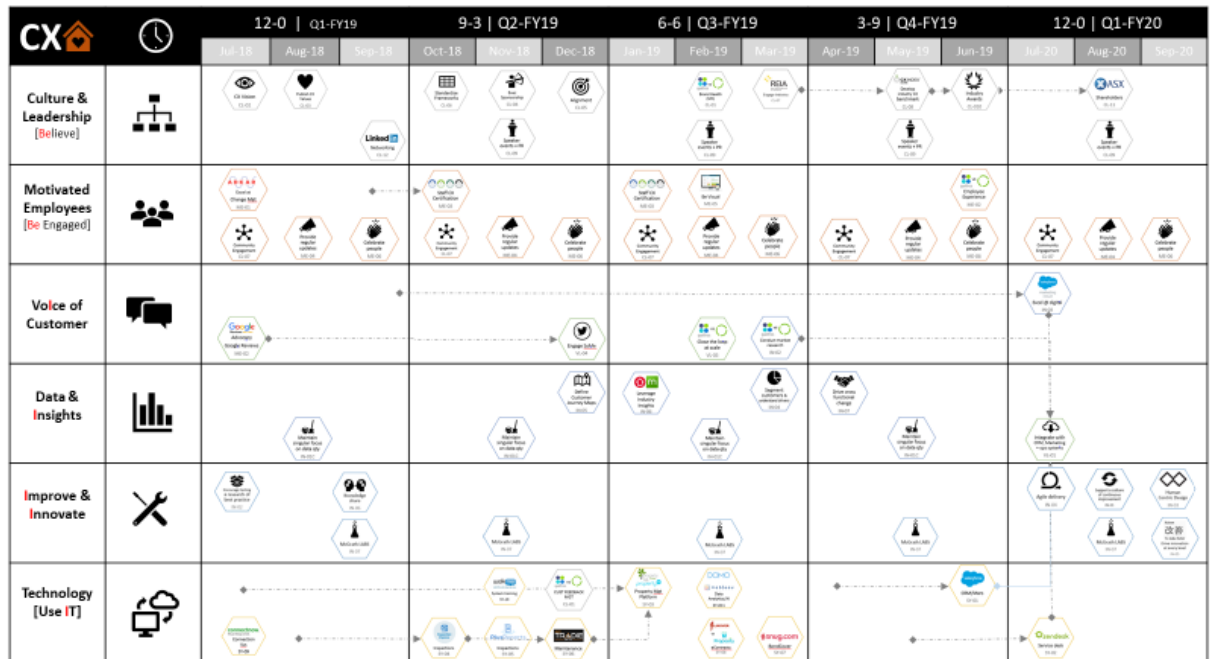
Delivery roadmap

McGrath

120d plans

A culture of curiosity
accountability, & delivery.

A belief that we can make things happen!

Project
Cycle

Develop People

Employer of Choice

Innovate + Improve

Work smarter

Delight Customers

Lead in NPS

Grow McGrath

9000 PUM

McGrath

Who

What's in it for me?
Show up – Skill up – And change an industry

Or leave for new opportunities, better trained, more experienced, more confident and more employable.

building21   **Learning Model**

Personalized Learning Pathways: Students' own strengths, interests, and passion shape their pathway across foundation and design years toward college and career readiness.

Strong Relationships
Every student is known and understood – this provides the motivation, safety, and confidence that students need to discover and pursue their passions.

Problem-based Learning
Students learn through inquiry and problem-solving, then apply the lessons to make an impact on school and community.

Master Foundations Competencies

Real-World Learning Experiences
Learning takes place in and among the larger community, through career-connected studios, mentoring, internships, and more.

Competency-based Assessment
Continual assessment ensures that students progress toward mastery of competencies and receive the right level of support.

Are **you** up for the challenge?
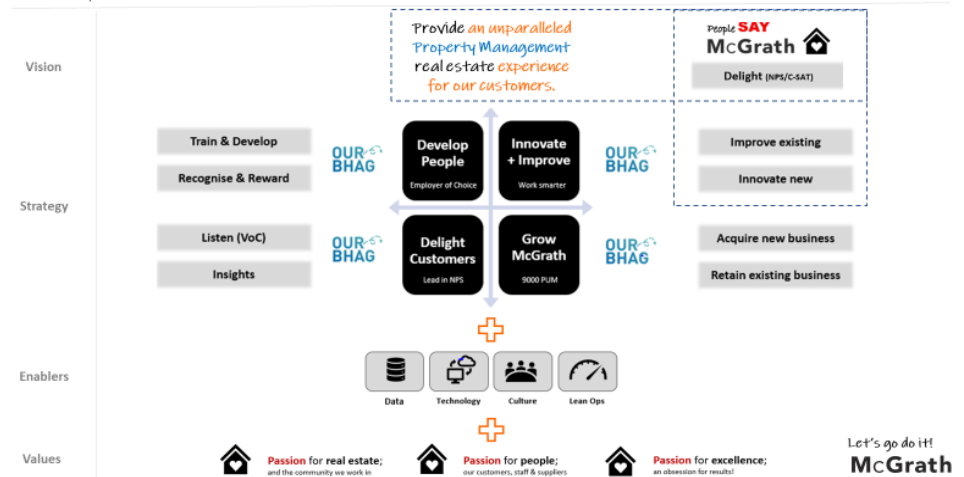
Are you **committed** to the **Vision**?
Do you **believe** in the **Plan**?

Can you **tell our** story?
Are **you** **ready to lead & deliver** it?

If not, think about what is it that needs to change?

McGrath

PROPERTY MANAGEMENT IS IMPORTANT

McGr

WE'RE LIVE

Change Management + Communication is key to success

XM Platform | our secret sauce

SURVEYS
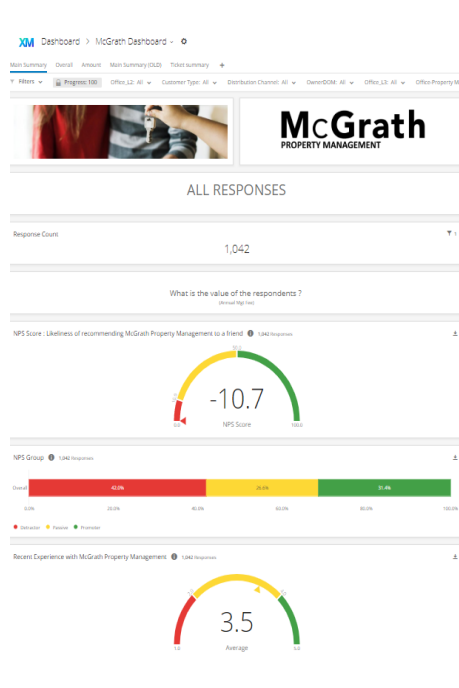
DASHBOARDS
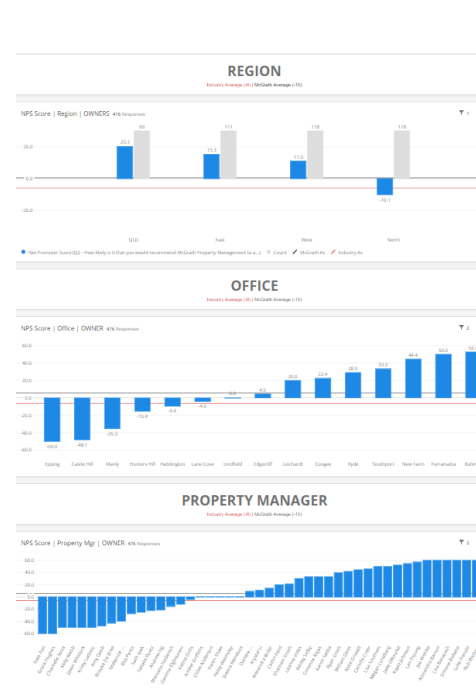
REGION
↓
OFFICE
↓
INDIVIDUAL
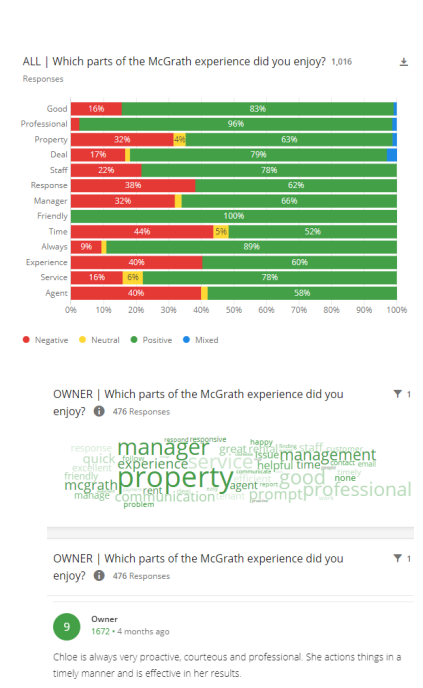
INSIGHTS & DRILLDOWNS

McGrath PROPERTY MANAGEMENT

YOUR SAY
Owner Survey
July 2019 - Dec 2019

% Responses 27 Responses

33%	33%	33%

● FIND A TENANT   ● LEASE   ● RELEASE

Industry NPS Benchmark ⓘ

+04 AU REAL ESTATE
- **- 06 PM**
- +12 Sales

Source: 2018 NPS Benchmark Report

Support: davidw@mcgrath.com.au ⓘ

⌂ Back to top

FIND A TENANT
PREVIEW SURVEY

LEASE
PREVIEW SURVEY

RELEASE
PREVIEW SURVEY

Response Count of Owner | FIND A TENANT ▼ 1

9

Response Count of Owner | LEASE ▼ 1

9

Response Count of Owner| RELEASE ▼ 1

9

Sum of Annual Mgt Fee | FIND A TENANT 9 Responses ▼ 1

$21,308.00

Sum of Annual Mgt Fee | LEASE 8 Responses ▼ 1

$17,714.20

Sum of Annual Mgt Fee | RELEASE 7 Responses ▼ 1

$13,623.00

NPS Score : Likeliness of recommending McGrath Property Management to a friend ⓘ 9 Responses ▼ 1

50.0
100.0
0.0   100.0
NPS Score

NPS Score : Likeliness of recommending McGrath Property Management to a friend ⓘ 9 Responses ▼ 1

50.0
100.0
0.0   100.0
NPS Score - Owner

NPS Score : Likeliness of recommending McGrath Property Management to a friend ⓘ 9 Responses ▼ 1

50.0
100.0
0.0   100.0
NPS Score - Tenant
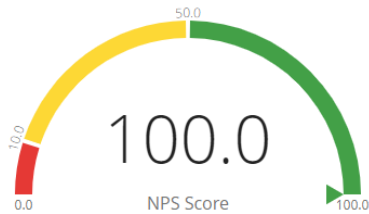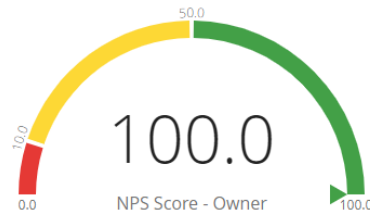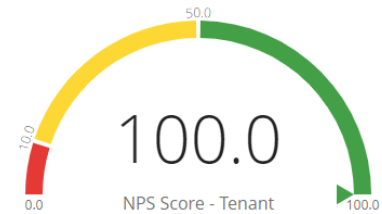
Move PM to the Cloud

Key challenge
Serving two Customers

Customer needs
- Be informed
- Be transparent
- Protect me/my asset

Business needs
- Scale
- Efficiency / Effective
- Compliant
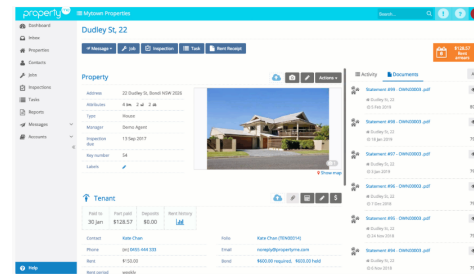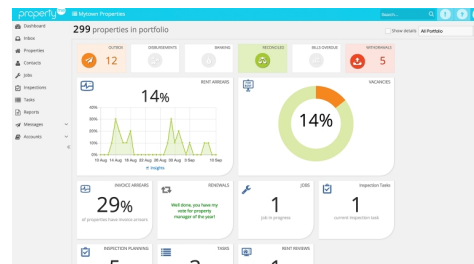
Enhanced UX
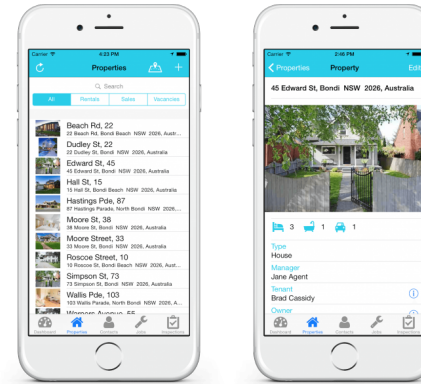
Mobile

Portals

Contracts

FLK
I T O V E R

96%
would like to
**sign a lease
w/o having to
travel**
to the agents office

Create new lease for

Apartment | House

Address
1 Smith Street, Smithville, NSW 2000

Create new lease

Cancel
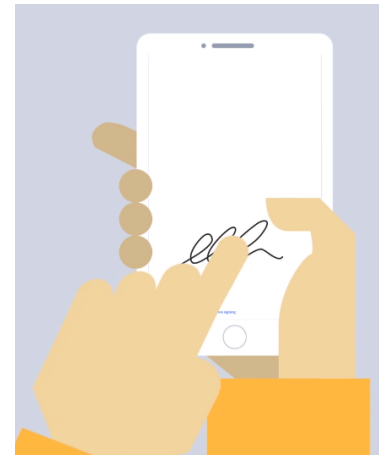
"What is the
name of my
Property Manager?"

**Digital
format**

Mobile

Integrated AI

Inspections

65%

want a more
user friendly
inspection experience

Inspection Express

PlusReports

"When is my
next inspection?"

"Where is the
power box?"
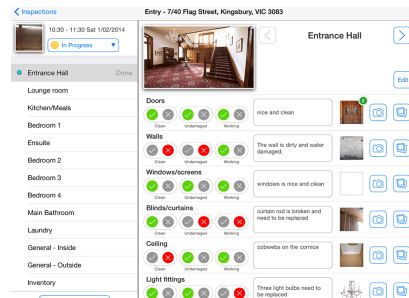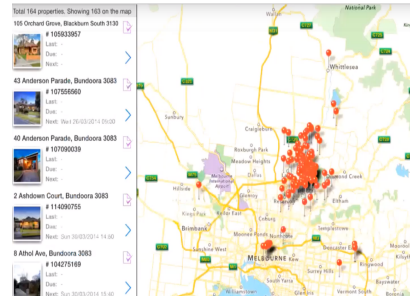
Enhanced
planning &
reports
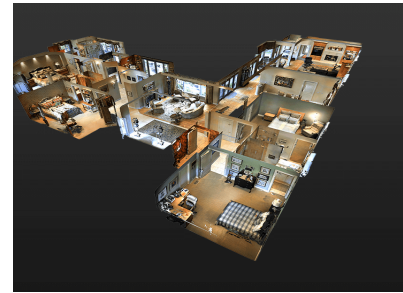
Interactive 3D
walkthrough
maps

COMING UP

Integrated AI

COMING UP

Maintenance

 i4Tradies™

30k jobs/yr

Key stakeholders have no visibility of service delivery
and no voice in rating their experience.
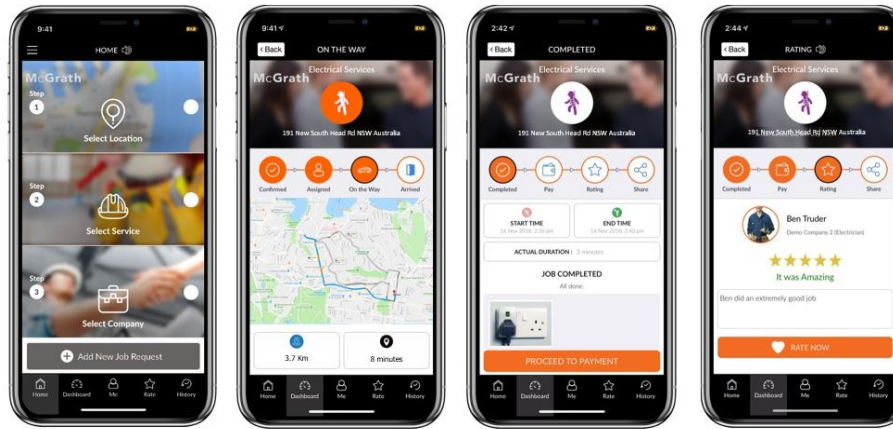
Request

Track

Notify

Rate

Tradie Portal
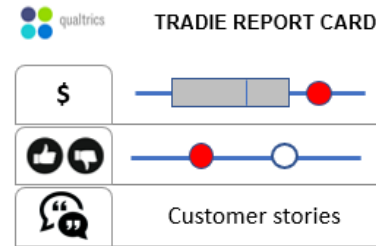
Rate My job Report
COMING UP

TRADIE REPORT CARD

$

Customer stories
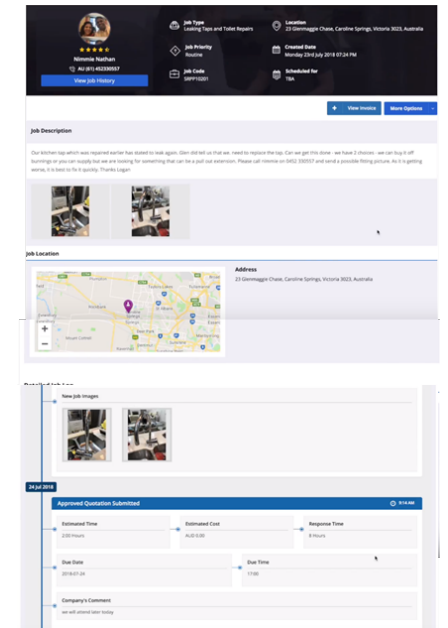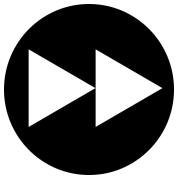
What next?
CXJM and Service Blueprints
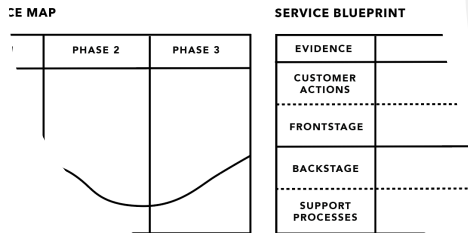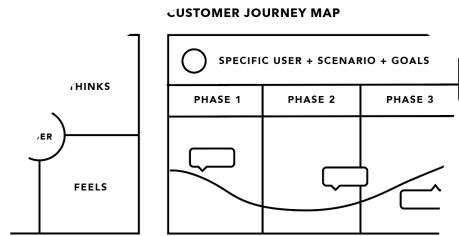
This year our focus in PM is to EMBED our CX Transformation.

Build	Embed	Refine

To do this we will create & train THREE **DELIGHT TEAMS** to map the OWNER & TENANT...

1. Customer Experience Journeys Maps
2. Service Blue Prints
3. Process flows; and
4. Ideas for improvement.
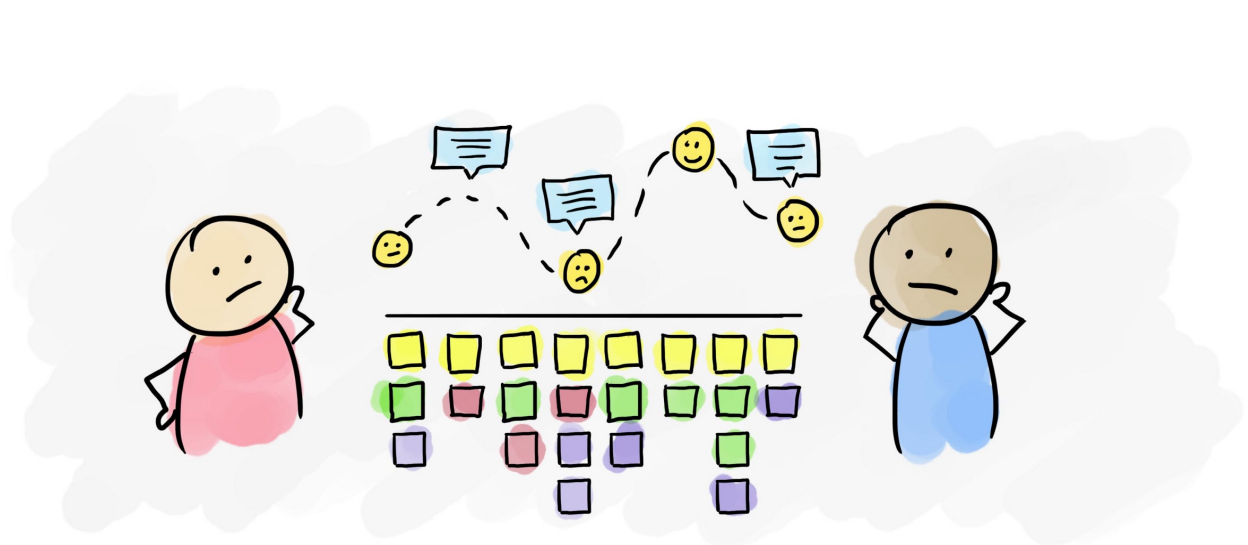
TEAM ONE

From Agency Search to Tenant Move-in

Jobs to be done
- Agency search
- Open house
- Application process

LANDLORD JOURNEYS		
LIST	LEASE	RENEW?
MOVE IN	RENT	RENEW?
TENANT JOURNEYS		
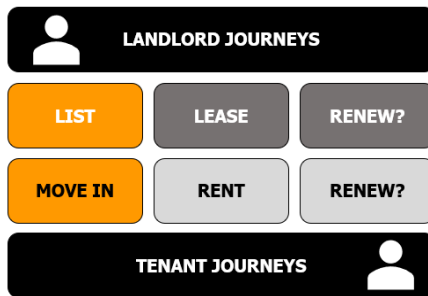
From Property Search to Move-in

Jobs to be done
- Property Search
- Open house
- Application process
- Move-in

TEAM TWO

From Lease start to Lease end

Jobs to be done
- Rent payments
- Inspections
- Maintenance

LANDLORD JOURNEYS		
LIST	**LEASE**	RENEW?
MOVE IN	**RENT**	RENEW?
TENANT JOURNEYS		
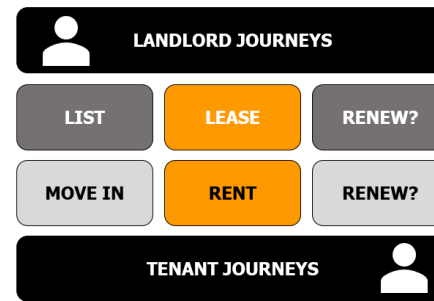
From Move-in to Lease end

Jobs to be done
- Rent payments
- Inspections
- Maintenance

TEAM THREE

From Renew/exit to Tenant Move-out

Jobs to be done
- Termination notification
- Exit inspection
- Bond / Tribunal

LANDLORD JOURNEYS		
LIST	LEASE	**RENEW?**
MOVE IN	RENT	**RENEW?**
TENANT JOURNEYS		
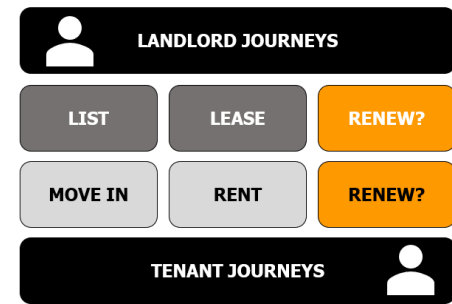
From Lease Renewal/ Termination to Move-out

Jobs to be done
- Notice to vacate
- Exit inspection
- Bond / Tribunal

Four workshops over two weeks

Week 1

Week 2

Day 1	Day 2	Day3	Day4

AM

Training | CX Essentials

Owner Journey Map

CUSTOMER JOURNEY MAP

SPECIFIC USER + SCENARIO + GOALS		
PHASE 1	PHASE 2	PHASE 3

Tenant Journey Map

CUSTOMER JOURNEY MAP

SPECIFIC USER + SCENARIO + GOALS		
PHASE 1	PHASE 2	PHASE 3

Map Owner Processes

S — I — **P** — O — C
Supplier — Input — Process — Output — Customer

Start → Step 1 → Step 1 → Step 1 → Step 1 → End

PM

Customer Fishbowl

EMPATHY MAP

SAYS	THINKS
DOES	FEELS

Owner Service Blueprint

SERVICE BLUEPRINT

EVIDENCE	
CUSTOMER ACTIONS	
FRONTSTAGE	
BACKSTAGE	
SUPPORT PROCESSES	

Tenant Service Blueprint

SERVICE BLUEPRINT

EVIDENCE	
CUSTOMER ACTIONS	
FRONTSTAGE	
BACKSTAGE	
SUPPORT PROCESSES	

Map Tenant Processes

S — I — **P** — O — C
Supplier — Input — Process — Output — Customer

Start → Step 1 → Step 1 → Step 1 → Step 1 → End
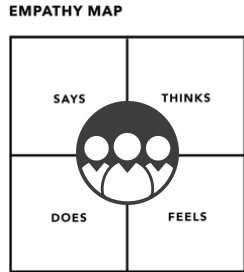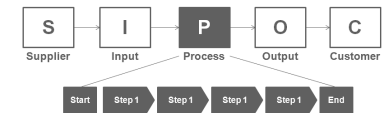
Prioritised ideas

Prioritised ideas

Project Timeline
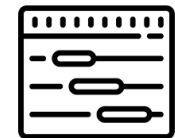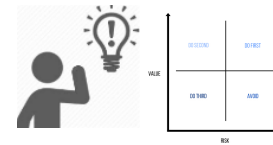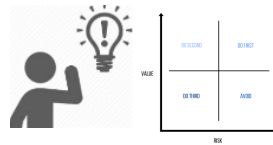
STREAM 1 | ONBOARDING

**From Agency Search
to Tenant Move-in**

Jobs to be done
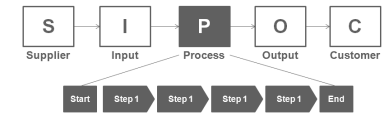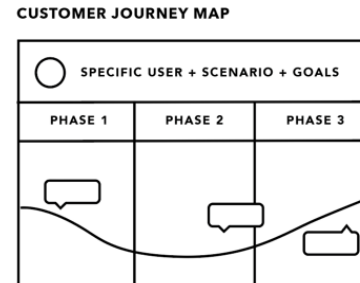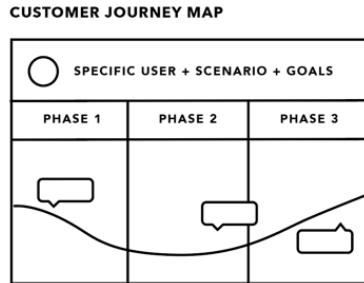- Agency search
- Open house
- Application process

👤 **LANDLORD JOURNEYS**		
LIST	LEASE	RENEW?
MOVE IN	RENT	RENEW?
TENANT JOURNEYS 👤		

**From Property Search
to Move-in**

Jobs to be done
- Property Search
- Open house
- Application process
- Move-in

CORE TEAM

**Kasey Waite
(Stream Lead)**
Area Manager
New Farm

Natalia Sulovska
Property Manager
Paddington QLD

Claire Wells
H.O. Property Management
Springfield

Tiarn Brown
Property Manager
Surfers Paradise

Naomi Sheldon
New Leasing Consultant
Coogee

EXTENDED TEAM

👤 **EXEC SPONSOR (C,I)**
Rob Fearnley
HO PM

👤 **CX CHAMP (R)**
Todd Madgwick
GM QLD

👤 **GM CX**
Dave Watson

👤 **GM NORTH**
Kelly O'Brien

👤 **GM OPS**
Marina Peysakhovich

👤 **GM EAST/WEST**
Katherine Gaitanos

👤 **PM OPS**
Natalie Field

👤 **Marketing**
Grant Gordon

KEY DATES

Workshops

11 Sep	Workshop 1	CX Essentials | Empathy Maps
12 Sep	Workshop 2	Owner Journey Map
18 Sep	Workshop 3	Tenant Journey Map
19 Sep	Workshop 4	Process Mapping

Monthly
1hr a week to review Customer/Employee feedback

Core Team Delivery
- ❑ Complete Forrester CX Training
- ❑ Completed (CXJM/Service Blue Print) maps
- ❑ Ideas for improvement
- ❑ Present at TOWN HALL 10m

	Q1	Q2	Q3	Q4
WORKSHOP	AUG			
MEETING	MTHLY	MTHLY	MTHLY	MTHLY
REPORTS	QTRLY	QTRLY	QTRLY	QRTLY

To **effect change**
you need to **start**

*Whatever you can do or dream you can, **begin it**.*
Boldness *has **genius, power, and magic** in it.*

Johann Wolfgang von Goethe