# Go the Extra Mile: How to Deliver 5-Star Service without Burnout

**Kylie:** Hello everybody. It's Kylie Davis here from Proptech guru and Proptech Association, and it's great to be here. Our guests today are Helen Rolf from complete real estate Helen's had 39 years property management experience, and she specialises in training and mentoring, as well as supporting principals through buying and selling of rent roles. And her expertise in property management has been honed by all those years of hard work and dedication and a very keen eye for detail. And during her career, she's seen the industry evolve and change, and adapted her approach accordingly, especially around the technology. And so, she understands the challenges that property managers and agency owners face and is dedicated to providing them with the tools and knowledge that they need to succeed. So welcome, Helen.

**Helen:** Thank you, Kylie, glad to be here. Makes me feel very young. 39 years in property management. I started very early. Definitely a lot of changes in those years. Let me tell you.

**Kylie:** I can imagine. And of course, we're also joined by the fabulous Anita O'Connor from Forms Live and Dynamic Methods. Anita, passion for Proptech, is the bricks and mortar of Dynamic Methods. She brings the company's vision to life through her innate ability to build a cohesive team that makes the Queen's gambit look like an eight-bit graphic card. She's delicately extracting the very best out of her hand-picked team. And she is the living and breathing embodiment of Forms Live. So welcome Anita. Great to have you here.

**Anita:** Thank you.

**Kylie:** So, look, our goal today is to explore ways that property managers can deliver five-star service without needing to put in a lot of extra hustle and effort, because we immediately think that if we're going to deliver more, we have to do more. So, what we're here today is to unpack how we can disconnect those two things. But first of all, before we kick off, I'm just going to show a couple of quick slides to kind of ground us in some data around this. Let's look at what the customer and how customer expectations have changed. And Helen, you will have seen this across your career. I know I've seen it definitely across mine, because I probably pretty similar to you. But what we see now, these are figures from 2024 last, just last year, that Salesforce pulled together, and 62% of consumers today, regardless of what industry they're in, but they're expecting the companies that they're using to anticipate their needs. And this impacts us in property management as well. In addition to that, consumers are now starting to expect companies to understand their unique preferences. So, this isn't just about customisation. This is deep personalisation, so recognising who they are, not just what they are as a persona. And what we see as well is that 75% of Millennials, which are the age group now most in the property market, are actively avoiding making or receiving phone calls, so they will do anything to actually avoid a conversation with you. And their Gen-Z counterparts are even worse.

**Kylie:** I think we're all a lot more this isn't just a millennial thing. We're all a lot more suspicious about picking up the phone if we don't necessarily recognise the number. On top of that, what we see too is this change in tech roles in meeting those expectations. So, technology is quite responsible for these changing expectations, and this is the Uberisation of the world, I guess. But what we see is that what tech has done has changed how we think about processes. We want things to be transparent as consumers. We really want to be able to see what stage things are at. We're expecting things to go a lot faster because we can control them on our phone, and we want those processes to be really frictionless. And so, when things do have friction in them, our exasperation and frustration with friction is now a lot more off the charts than it used to be back in the old days when we expected friction. So, because we're expecting things to be fast and transparent, our tolerance of friction is a lot lower.

**Kylie:** Anita, I know that you've done a lot of stuff in this space, and these are figures from the voice of the pm that MRI software did last year. But we see that 51% are struggling with workload, and 54% struggle to switch off after hours. Because if you're constantly busy and constantly got a to do list in your head, or you can think about when you get home, is things that need to go on to tomorrow's To-Do list, 47% are working more than the prescribed sort of standard hours, and 66% describe their workload is really, really busy. So, basically, we've got three things going on – people expecting greater service, the technology making that both possible, but also making it quite hectic and increasing frustration if it's not delivered. And then also, PM, sort of really struggling in that space.

**Anita:** Because they do increase year on year, and I think the biggest culprit is our phone, right? Because you put your emails on it, you're seeing things, and you are responsive to things, or if you like me, I have it on silent for as much of the time as possible. Yeah, and I'm not a Gen-Z, and I think we're in a bit.

**Kylie:** I think we're at a really interesting inflection point at the moment too, because so much of the work that we still do is typing and reading base. So basically, we're sitting at our desk, we're reading a whole lot of stuff on our computer screen, then we're going home and we're peering, or, like we're in the car, or we're doing whatever, and we're peering again, and then sort of touch typing, I think, as we become a lot more comfortable with voice and instructions over, voice to text or voice to stuff, it's actually going to let us sit up and straight a bit more and therefore start to but, but to do that, we have to go down the AI path, And we're not going to talk about that yet. What we want to really do is think about, is just think about, what can we how can we use these three things to inform how we how we deliver five-star service? So, Helen, let's before we start to dive in. To the specifics with your industry experience. How have you seen client expectations shift over the years? And what does five-star service look like today?

**Helen:** Yeah, so I definitely think the demand for a quicker turnaround – people expect an answer pretty much instantly. So that demand is quite big on the PM world as well. But then making sure you've got all your systems in play for that automation that is going to make it more frictionless. It'll make it run smooth and transparent to your reporting into your form. So, making sure you've got all that stuff set up properly at the start is going to obviously take the pressure off you and your workload. Plus, you should be able to press a button and know what's going to happen. Making sure you know your templates and all those things are set up really well, and you know trained and what have you to everyone at the start means that you can press that button and have it go through. Hopefully seamless and very quickly, to your clients, and you can get something out to them pretty much instantly – because that's what people are expecting. The minute they hang up from you, or emailed you, they expect it to be back very quickly. Not wanting you to go and sit and type out a form and check and whatever. You should be able to just press the button and get it, and have it sent out to them. Which obviously is the beauty of using your templates in all your Forms Live forms.

**Kylie:** We're gonna dive into that in a second. But I guess it's actually, you know, making that time to sit down and think about, well, what are the common questions that we get? Like, what do we get asked all the time? What are the common problems that occur and just having standardised answers, or policy-based answers around some of those questions, right?

**Helen:** Absolutely, it's time to put it in to get it set it up. Most of our things are kind of repetitive that come through, I guess, as well some queries. But it's just having those candid answers or whatever you need ready to go that you've got it all set up. So, it's a bit of time and effort to get it sorted, but it's definitely going to make your life a lot easier if you have that set up.

**Kylie:** Yeah, yep. I mean, look, we hear all the time in the sales side that scripts and dialogs are actually really part of it. I think it's probably an interesting idea that we would have, and very relevant idea, that we would have that as available for PMs as well, so that they don't have to feel stressed in the in the moment.

**Helen:** Yeah, in the sales side, if they start, they get given scripts and dialogs of things to learn and know, so that you obviously also sound more confident and repeat. You know, once you're going over these things, you sound more confident to the client. And definitely something that's needed in PM, you know, to have some scripts and stuff for people to know some scenarios.

**Kylie:** I think one of the confidence things around that too, is that the person on the receiving end, the idea that their problem is not is something you've seen before, and you know exactly how to handle it. That's really comforting, right? That that gives that idea that, 'oh, okay, like, I'm not unusual', or 'this isn't weird, we'll be able to fix this pretty easily' – that's kind of important. What separates a good PM agency from a truly great one, in your experience, Helen?

**Helen:** Definitely having your systems and things in place, and all your procedures and your templates, as I said, it's it comes down a little bit to your data entry and obviously making sure, as I said, your templates. Because everything should just, you know, from where to go. Once you've got a new management you've entered them into your system, all your reports, all your forms, everything should just be coming out exactly how you need them. So, it definitely should be what you're concentrating on in your office, to make sure your systems and templates are good to go.

**Kylie:** And so, putting the tech to one side, what do you recommend if we think about that idea of transparency, what sort of things do you work in with your clients as to how they can make their PM businesses more transparent?

**Helen:** With the services, it's just being more communicative to the landlord, or to whoever you're dealing with. Making sure that they know how it's all going to work and what's going to happen. Just making sure that you are communicating to them all the steps along the way, or what you know how it's all going to work. It takes the pressure off you, because they know what's expected and know what's going to happen. It's communication, it's the key to everything.

**Kylie:** So, what's the processes that you implement? I know that you're a bit of a super user of Forms Live. Is that where you've got those policies and things set in an appendix or in documents that go out with standard info?

**Helen:** Yeah, you can have it. You can merge whatever you want into the form. So, any information that you're giving to your landlord should be part of one of your forms that are going out, you can have it attached. So you know that when I've sent out maybe my new managing agent agreement, they've got all our terms or our expectations as an office, of what we will do for them, what they need to do for us, and how we want to enhance and look after their investment for them. A lot of people don't realise you can have all that attached into your document and your template, so that it's not only just sending the management agreement, but you're also sending all your other information that you wanted to. And it also having that streamline doesn't overwhelm the owner or whoever the client, that you're getting five different emails with all these different attachments. It's just that one document.

**Kylie:** Yeah, you might just read the overview and then come back to it to read the detail a bit later on. But you know, you don't have to search through your email for 59 different emails.

**Helen:** Yeah, and as a team member, I suppose you're not looking for five different attachments. Or I've got to find this, and I've got to put this, and I've got to put this into it like it all could be in your template of your forms that go out.

**Kylie:** I love that too, because that kind of talks to the emotional labour of having to remember all the conversations, all the important things that you were supposed to tell the landlord when you were signing them up. If it’s all in one place, well, if I send that out, I know that all the important things are covered, right?

**Helen:** That's right. So, I know you know form one, or whatever I want to call it, when it goes out, has got all this in it. So, when they ring up and say, I didn't know X, Y, Z, well, sorry, that would have been in our form one, because I know what's part of that template.

**Kylie:** Anita, do you want to give us just a quick view on how that might look, and how to deliver transparency without any effort.

**Anita:** Yeah, look absolutely. Would love. It's also like internal teams and your customers, you know, having an understanding in your internal team. On a template, as Helen stated, you know, I'll add to a lease agreement, and I've got the rules of how you interact with my agency, with my business. Having my staff understand it's there and it's going to go out every time those rules of engagement are there to be repeated and to be referenced and when you create a form from a template for tenancy agreements, it's the rules of engagement with my organisation. I recall when my kids were little and went to school and we were given a book, you know, what happens when someone's got X, Y, Z sickness, they've got conjunctivitis. I'd keep going back to that little book, right? And going, okay, they've got to stay out of school for three days, right? Yeah. So that was always there. When you send a form with a document attached, it's one document. So, if I look in my emails, I'm going to open that, and my rules of engagement are there as well. And my whole team knows that they're always attached. You know, it's that consistency within your team, within your interactions. And you know, hearing and listening to your customers are two different things, in my view. You can hear them, but are you actually listening to them? What? What are they wanting? Anyway, I'm going to switch, and I'm just going to share my screen.

*[Forms Live demonstration — Templates]*

**Anita:** So, I have a template set up for my managing authority. So, my interactions with my customers, not the end tenants, and this could be this in a sales scope – it's my engagement that I have with my vendors before I'm selling. PM, or sales, we've got different needs, so let's add that rules of engagement at the end into my documents. Every time I create from. What I've added to this managing authority, and because I'm opening a template, it's giving me the option, okay, do I want to look at the template? Or am I creating a form from this template with my attachment? In this case, I'm just going to take a quick look at it, and this is where I fill in my standard details so to appear every single time. I've got my business logo in there, because we love our branding and. And when I'm my rules of engagement with my landlords or residential rental providers, depending on which state you're from, and on each anniversary of renting or the property, I need a box of chocolates, right? That's my rules of engagement. All right, it might be light-hearted but what I have seen is, documents about tenants' rights. You know, whatever it is that standardisation that you have in your business, like just in business, we're working towards that on the software side – let's have these procedures, these policies, these rules of engagement that everyone can access. And that's, that's the point. It's that central communication, okay, is that cool you could with that?

**Kylie:** Sounds great. Well, look, I think there's a whole lot of stuff you could include in here, which would be, they might be your service level agreement, like the things that you commit to as a service to either landlords. Or to it might be, the rules of engagement, like you said, and or it might even be like your values as an organisation as to how you how you embody them as part of the service that you deliver. I think what's really important about this is that if you have it templated, and the process is that the standard information goes out for everyone. You're also then creating an audit trail, right? So, if you ever end up in a tribunal or anywhere like that, or if people are behaving poorly towards you, you can refer them to the policy or the documentation that they are in breach of. Or you can demonstrate that you showed that you shared information that was that they that they needed to know as part of the as part of the process and I guess to all templates are there to create, and processes there to create structure, certainty and security. But if you need to, for whatever reason, make an exception, you've still got that flexibility. But you're doing that mindfully, you're not sort of just flip flopping all over the place, because, you know, there's, there's no process in place. You've got like a spine behind it.

**Anita:** And it's interesting, you know, those rules of engagement – and Melanie has asked a really valid question about meeting expectations – and we are this instant society. We now have this expectation of this instant society. You know, those rules of engagement could also cover when you communicate to right by putting that in place that it's shared with everybody, yes, we will endeavour to be reply to or be in contact with you within X hours, and then anything you do above that, you know, you know you exceed expectations. Great. And I get that with property matter, it's a 24-hour business. People ring in the middle of the night. You have dedicated phone lines, or you rotate a mobile phone. How does it work? That's a question. Guys in software, we've got certain email addresses that ping differently to us. If there's something that is highly important, how does it work on the PM side? I've heard of, you know, a mobile phone rotor that it goes around the specific phone. Or how many phones do PMs have?

**Kylie:** I don't know, we'll put that out to the group. I think, I think what's really interesting as part of this too, is like, well, what's your what are the common when are people most stressed? They're usually most stressed when something's gone terribly wrong, like an exploding hot water service or locked out of the apartment, or, I guess you can think about what they are in advance and think about how they might be different to other service level agreements around like, if it's an emergency, an emergency constitutes something that is, you know, threat to life. And if you can identify what they are in advance, you can have different delivery times to other standard run of the mill problems. But how would you handle it, Helen?

**Helen:** I think you're putting that expectation out there and saying to someone, this is how we're going to work. And as Anita said, you know, if I say you will get back within 24 to 48 hours, and I ring someone in three hours, well that's going to make you look brilliant as well. But definitely getting everything out in black and white and having that paper trail, you know, as I said, you can always someone's ringing up saying, Well, you haven't run for, you know, whatever it is, it's been 10 hours, 12 hours or something. So well, you know, I know that. You know, back when you got that document, we've said in there, 24 hours. So, we've, we've, we've still exceeded our expectation of what we said we would deliver. So that's really powerful. I've learned that over the years when I used to, you know, you're always like, yeah, get it done now. Now, okay, we'll have it done by next week, and you get it done by tomorrow, and it's just, if you set that expectation with someone, it's going to make your life a lot better.

**Kylie:** So, look, we seem to be coming naturally into this sort of speed of turnaround us. Let's talk about speed. So, Helen, how can PMs work faster when you're Where do you see agencies and PMs losing the most time through double handling or where do you see them losing the most time or wasting the most time. Not intentional time wasting.

**Helen:** It's just still, as I said, I know I keep going back to the templates and the procedures, and having all your forms there is, people coming back to going, 'Oh, I've got to do this, this, this, this, and this form. So having it all as individual tasks, where it could just be one task in one form, you've pressed the button that's gone out. And then also, if everyone knows what the expectation is, not that you've gotta trust your staff, but if you know that, I've given it to maybe a junior staff, or someone who's your assistant, to say you're doing batch letter one, I've still kind of got control of what I know went out, as long as they pressed batch one, because I know that I've set up those templates and set up the data for that that I know that it's going to go out correct. So that can save a lot of time, because you shouldn't have to be proofing too much, because if you, if you're in control of putting that data in to start with, everything else should just be streamlined and go out without any issue. So, you can ask for other people to help. And you know, make that a one-minute job instead of a 20-minute job.

**Kylie:** So can I, can I just sort of go backwards and just check my understanding on it. T re's lots of different forms that need to be filled in I'm imagining as part of an onboarding process. But what you're saying is that you can batch them together so that they become one template?

**Helen:** A lot of people think that it's only the forms that have to be part of that you can attach a PDF that you've created. So, some people think they have to send out our expectation sheet isn't a Forms Live form, so I can't – I've got to send that separate. It can all be put into one template. So, a lot of people, I don't believe, use that function, or know that they can do that function.

**Kylie:** But is there a trick Anita to bundling different forms together in Forms Live or like so that they're batched?

**Anita:** It's more about the attachments that you can add on again, reflecting back on what I was saying earlier, you know your rules of engagement for your tenant, versus your rules of engagement with the landlord that you're dealing with, and you can with certain integrations. It does bundle things together. We also have annexures available. And in Victoria and also in South Australia, we have another thing called Info Request, where you can ask for that information direct from your customer. You can say, hello, customer, I need you to fill out this information so I'm not harassing you. So, I'm not harassing you on the phone. You know, looking back at your slide and your info earlier about how we're avoiding phone calls, right? A lot of people are avoiding phone calls, and I get that. And batching when you're performing tasks.

*[Forms Live demonstration — Info Request]*

**Anita:** One of the things that we do, when I'm in Forms Live, we've got the option of sending out a form for Info Request. I can choose, I've gone into I've got a sale authority here, and this feature is available on multiple forms, where you can say, Great, I want to Info Request this, I want to send this out. So, what I did was I opened the sidebar, I looked at the button that said Info Request, and this is the information that I am sending out to my client to complete. And we've even gone a step further by going okay, let's require some fields where they have to fill out certain fields in property management agreements, there's more, I absolutely need you to fill this out. You know, batching works. I used to teach a course called Managing your Time in Outlook. It's a great idea. You want to do similar tasks in one time, so you're in the rhythm. So, you can send out information and ask your client and horses for courses, right? If I was sending it to Kylie or Helen, I'd be more than comfortable. Hey, I'm going to send you this, you're going to fill out the information for me. I might not do it for my mother, she's a little older, she might not be tech savvy, but it's always that discussion, that communication. Hello, clients. I'm going to send this to you, for you to complete. You know that's where customer service is again, that listening, not just hearing.

*[Forms Live demonstration —Forms Live Sign]*

**Anita:** And when it comes to batching, when I've got forms to sign, I'm Ms Agent sitting here, I've batched my sending of information out to my clients, and now I've got the action of I need to sign these forms, so it's all crossed off, ticked, dotted, crossed because everything ticked off. Because at the end of the day the forms, the content in the forms and having everything signed off and an audit trail, which I'll show you too, that's what the gospel is, right? That's what, if there's a problem, that's what they're going to refer to. What form did you sign? Including that rules of engagement, which I think is a great idea. In the forms screen at the very top, I've got a little button action required. Here are the forms that I, Ms Agent, need to sign, and I can sign now. Batch. I think that is the biggest time saver, is batching things, you know, batching tasks for you to do at certain times. You know, Friday afternoon, filing is great, right? I'm there, there enough to do it.

**Helen:** I think a lot of people don't use that request of information as well, which, once again, that could save you three or four emails back and forth or phone calls of how you know, getting people's details, you could say, I'm going to fill in as much as I can. The form is going to come out, but I just don't think a lot of people know that features there that also gets your form quicker completed properly. Yeah, it's a tool that I think is really underused.

**Kylie:** Yeah, it sounds like a really powerful tool. I imagine it would work quite well when you've got a new tenant in if the tenant actually wants to share the condition of the property, or like to identify things that they've seen in it, or, to give you some feedback. And that would be an amazing service thing too. I know from my kids, when they've been renting, they've had to then go and create a list and take photos or do whatever they've done to share that with the managing agent. But actually just having a form that was able to give, give the tenant or the renter a sense of this is my feedback on the on the property that we think would be really, would be really helpful as well.

**Helen:** That would be date and time stamped as well, which is what everyone needs.

**Kylie:** Yeah, exactly yes, rather than it just coming through an email and then you having to download it and attach it to their record in the CRM. If you send it out through this, it's going to go directly feed through, isn't it Anita?

*[Forms Live demonstration —Audit Trails]*

**Anita:** That's right, that's right. And when you get when you get signed, we've got the audit trial, which I've got on screen at the moment, so you know when they've signed it. And again, you know that rules of engagement and attachment get me a little excited, because every agency, every business, is different. Every interaction you know, I think it's important make your rules of engagement how you interact with your clients, and make sure all your staff know what your rules of engagement are because that reduces stress, knowing that your team are understanding the same thing at the same time. That's what makes a good team, right? We're all working from the same book, the same playbook.

**Kylie:** The thing about batching too that works really well is that there's some research out now, neuroscience and psychology research out now that shows that one of the reasons our brains are so exhausted at the end of the day is because of this idea of tabs open, right? So having too many tabs open every time we do a concentration switch from one thing to the other, it can take up to between 12 and 20 minutes for our brains to go into it. So if you've got a day where you're going, like, you know, between tabs to do all these different things, you're literally really working your cerebral cortex extraordinarily hard, and then dealing constantly with, like, the stress of cortisol, of like, oh my god, haven't done this. Oh my god, I haven't done that. So, like, that is why you're getting to the end of the day and just reaching for the red wine, because it is absolutely an exhausting way to run your brain. So batching, like, taking these shortcuts really are quite important. So, our last part was friction. We were going to have a quick chat about friction. We've started to talk about digital signatures. We've talked about and we've talked about sort of ways that we can reduce friction internally as well as externally. The live sign Helen, what do you see are some of the really common friction points between investors and renters and PMs.

**Helen:** A lot of things, I guess it's just making sure it's a seamless process for them, especially first-time investors. You know, they're always very, shouldn't say highly Sure. You know that it's a lot to them to make sure it goes smooth. They want the money smooth, and the form works. They're coming to you for your expertise to make sure that it is all done correctly. What we've got utilities, connections, that is embedded in your workflows and things like that. But it's just, it's once again, like, I know we've said it many times today, your communication and your policies and procedures, because it is a big investment for people. I know, we all look at it as just another property on our list. You know, some people it's a really big, a really big decision to have that investment property, and it could be a big financial burden if things don't happen. You know, it all works well for them, I suppose, which is where they want you to make sure it's all done properly.

**Kylie:** Yeah, absolutely.

**Helen:** The friction with the money, you know, they want the money straight up, and they want it all done properly. So, you've got to make sure you've got all your paperwork in place so that it is, you know, a legal document. It's all it's all going to happen, hopefully in the perfect world that we live in property management.

**Kylie:** yeah, and I guess from a tenant's point of view, the friction there is, when can I move in? When can I grab the keys? Is everything going to be working the way that I thought it was? Is the place going to be clean? What do I do if it's not if it's not like how soon from the time I give you my application, am I going to find out? Aal of these things. I guess I'm imagining you could automate or structure them as well.

**Helen:** That's a very big thing, especially when we're talking about the work overload for PMs and stuff. You've all got systems that we can put in place and setting that expectation once again, you know, you've applied for your property. We'll let you know within 72 hours, or whatever your time frame is, give yourself time to breathe, to do it. Otherwise, now that there is such demand out there, you're going to have 20 people ringing you within an hour going once have an application. So, you need to set that expectation. We'll get back to you in 24 Oh, you know, whatever it is, 48 hours. And also, for the person moving in, having this, you know, a bit of a check, you know, you got to do your utilities. You've got to do this. You've got to do that. Like them, knowing what they've got to do. It's not always first-time renters, it's other renters, and there's revenue to be earned for things like that as well, if you are being efficient with your tenant, and making it easier for them that they know, this is what will happen. Obviously, you do want to hand the property back how you expect it to be but making it an easy transition for them as well will make your life easier as well.

**Kylie:** Yeah, so, so that idea of removing some of the friction in the move, like having your utility set up, or having how and how important automations are or how hard or easy is that to do, and how much effort is involved?

**Helen:** There's no effort, it's very easy. Your licensee is going to love it, because obviously it does bring revenue to the business. It's basically just entering, making sure you're entering the data and ticking a box, like it's no effort, if you have it integrated, it just happens behind the scenes, basically. And it's, you know, everyone thinks that those things are just sometimes for utilities, but if the companies that you're using are probably, their job, then your job is just to pass the information over for a contact. They will try and get them onto everything that's going to be beneficial to the business, financially, as well as just making it, you know, a better experience for the tenant.

**Kylie:** Can we show people where that happens?

**Anita:** yeah, for sure, let me share it.

*[Forms Live demonstration – Utility Connections]*

**Anita:** In forms live, you have the ability for the connections to connect your preferred utility provider. We do work with other organisations as well. And Kylie, is it the five Ps – Preparation Prevents piss poor performance? So, the time spent upfront setting up your whatever program. I know I'm a Forms Live guru, that's one part of me. The other one's the Outlook part of me, it is about knowing your product, setting up processes, and that rules of engagement for you and for your team. Everyone logs in themselves. We've got this set up. I've set it up. We've got this agreement with whoever my utility provider, and know that when I've sent a tenancy agreement or a rental agreement out, once they've electronically signed, because electronic signing is part of Forms Live, they will be presented with that screen to show them, not only my form's been signed. That's great. So that transparency, but also, you know, as a property manager that they need to have assistance, or at least be offered assistance, for utilities. It takes them through to that next stage. And say, Do you want us to contact you quick, setting up your systems to work for you instead of battling them. Setting up time for you to process these things. Batching your time, these are the things that will reduce stress. You know, there's no perfect world, but we can do our damnedest to set things up to work as smoothly as possible, because we know that things fall through ceilings or water systems break down, whatever ankles are broken. All these things happen, and we deal with them as we need to. But if we can put aside and set time for those standard things that we know every single time it will just happen. It's going to save everyone's stress. That's my that's my two cents.

**Kylie:** When I'm talking to a lot of Proptech startups or early-stage businesses, one of the one of the lessons that I try to share is that pain is actually God, The Universe, the God of businesses, way of saying, Pay Attention! So, you've got two options – if you've got a system or something going on in your business that is really painful, you can either try and shut it down and run away from it, in which case it will keep biting you on the bum until you decide to deal with it. Or you can lean into it and say, okay, this is annoying. But what is the lesson here? What do we need to fix something's broken? We need to fix it. And I think one of the I know it's really hard when you're in property management and Helen you, I guess, be able to back me up here, but when you're always on the hamster wheel, it can be hard to take that time to just okay, we need to reset. But there's gotta be time in your week or your month where you can basically say, you know what, Wednesday afternoon we're going to, we're going to, you know, at 11 o'clock, we're going to do like a work through from between 11 and two or something, and we're going to put some lunch on and muffins, and we're just going to talk about the things that are broken at the or the things that are really causing pain in the team, so that we can actually get clear on what we need build some little projects to start to fix it and delegate them, delegate them out, and then just set that as a meeting that happens every couple of weeks or once a month, so that you're holding each other accountable and checking in. Helen, what other advice have you got?

**Helen:** With that 100% and I think you really need to write down the things that are the pain point then pick which one is probably taking most of your time. You're not going to do it all in a day. Like this with a client at the minute, they're sending me two tasks a week that we get put in place for them. Because it's also one of those things that you've got to have that meeting, but you've got to allow time then to go and set it up. So maybe you've had one meeting where you get your list of what everyone thought should have been a better process this week, put them into your priority order, and then someone else has to have that extra hour a week, maybe, to put one in place. You know, you might have a list of 10, but let's aim for two a week that we'll have it done, and then in no time at all, it will be all streamlined. So, you've got to look at the little pictures and work through, but you've got to get the pain things as well. I think, you know, you've got to try and hit them first thing in the morning when you're fresh. There's nothing worse than as a PM, having this sort of complaint list, or whatever you've got, you've got to follow up the hard tasks, try them, do them first up, because then they're done. Otherwise, your day does disappear and it's just going to be that hamster wheel as you said.

**Anita:** Eat the frog. Eat the frog. That's what it is, Helen.

**Helen:** Yes, that's what it is, eat the frog.

**Anita:** Yeah, first thing in the morning.

**Kylie:** Where does that come from again?

**Helen:** I don't know, but I've heard it a lot, though.

**Anita:** If the worst thing you have to do in a day is eat a frog, do it first thing in the morning. Get it out of the way, because otherwise it will get worse and worse in your mind. And you know, that's the thing. Depends on your energy levels, too. I'm a morning person, that's great, and I know that's why I batch certain things in the afternoon, because I need a little bit more low key. I don't want to interact. I'll set my meetings anyway. That's yeah, I could go on.

**Helen:** Eat the Frog is a book – get more of the important things done today and to get it done first up.

**Kylie:** I'm ging to give a plug to Dr Kristy Goodwin's book, Dear Digital, we need to talk. It's got some great tips and tricks on how your brain works, like you're fresher in the morning. In the morning is the best time to problem solve and learn new things. It's really tempting to come in, in the morning and try and clear inbox. First all you do is be on the hamster wheel all day. Like, yeah, if you've got that project to set up your integrations or write the template for your automation sequence around onboarding a new client or renter or something. Use that get just carve an hour and a half out to give yourself some good flow time to get that done. Reward yourself a little break for a coffee and a muffin or a freond or something after it and then go and when your brain's a little bit tighter, then respond to the emails like you can structure your day slightly differently.

**Helen:** What was that book called?

**Kylie:** It's called Dear Digital, we need to talk, by Dr Kristy Goodwin. She spoke at the rise conference this year. Fantastic presentation. And her book is full of just practical advice to it explains why our brains are so tired. And it also gives you some really practical advice that little, tiny things you can do in a in a day just to build up to it. She doesn't say, oh, you need to turn your phone off. She's like, so she's not preachy.

**Anita:** She's realistic.

**Kylie:** She's very realistic. Ans she's a genuine doctor, a medical doctor. So, it's all backed up with lots of really cool research, but things like the batching and like and the ducking between tabs and how that makes us really tired. All of that's covered in that book. It's, it's a great read.

**Kylie:** Thank you so much, I think we've covered off some huge ground. I don't know if anyone's got any last questions that you want to that you want to ask, please pop them into the Q & A quickly, and we'll try and wrap up. But I think what we've heard today, how do we deliver it is possible to deliver five-star service with we know just one-star effort. You gotta put a little bit of effort in, but that effort needs to come at the start, from sitting down and thinking through, how do we understand what service we want to offer, creating the templates and processes and then enabling the technology so that, literally, we have security around what we're telling people. We know the process is being followed, and it then gives us that ability to batch our time and to see what's happening easily inside our systems. And it means that you know your team knows, you may need to explain it a couple of times to clients because they didn't read the full thing. But you've got that structure behind you so that everybody is on the same page, and you know what you will accept, what you won't accept, and what happens in the gaps in between, right? So, any other last thoughts, Helen and Anita?

**Helen:** I'd just review all your templates and procedures. Just pick a couple of your major ones, slow and steady wins the race, right? Get a couple done, ticked off, then that's going to streamline. It will feel like it's a big task to do, but you'll definitely get the rewards once you've got it all set in place.

**Anita:** A Be kind to yourself and your team and communicate. I think that's one of the most important things – communication. Whether it's to your clients or to your team, be consistent and setting up those rules of engagement, I think is very important.

**Kylie:** Yeah, and so I guess if anybody needs any help setting up those rules of engagement or working on what they need to be, I think Helen, you'd be happy to take a call, and here's the contact details. And also, if you need any help, once you've got your systems and processes in place and you're really happy with them, but you're just not quite sure how you want them to operate inside Forms Live, the Forms Live team would be more than happy to help you out. Some great resources there if you need any further help. So, look, ladies, thank you so much for your time.

**Helen:** Thank you for having me.

**Anita:** It's always lovely to talk to both of you. There's always something to be learned, and I enjoy our chat. So, thank you for everyone that's come on board or having a little listening. I hope we've given you some food for thought at the very nice, lovely.

**Kylie:** Thank you, bye.