



## Harbour Towne Condo Association Service Improvements

Hello!

Nearly three years ago, **HTCA identified an opportunity to improve our repair and maintenance service to our mutual customers, the Co-Owners.** Our CCIS (Computerized Condo Information System) is a web-based communication tool that provides access to all stakeholders and electronically routes information in real-time. For example:

- Co-owners can enter their Request online.
- The Request is routed electronically to the Management Company for approval and assignment to you, our service vendor.
- If Board Member approval is necessary, the Management Company will route it accordingly and the Board Member can approve it within hours.
- The system has the capacity for Harbour Towne (Management Company / Board Member) to
  - Create an Inquiry – giving you the opportunity to provide an estimate;
  - Create an official Work Order asking you to do the work;
  - Once you electronically reply that the work is complete, you are in effect issuing an electronic invoice which will immediately trigger our payment.
- Whenever there is any activity on a Co-Owner Request, this information is recorded in a journal-history so everyone, including the Co-Owner, has access to the status at all times.

CCIS has been under test with two vendors since the beginning of May and has proved to be very effective for all. **Those involved with the system so far have noted that communication is significantly improved** and there have been very few dropped balls between the Co-Owner, Management Company and Vendor. The Co-Owners have been excited to know when their work has been deemed “complete” and then are given the opportunity to give their feedback.

**As a preferred vendor, we are now ready to invite you to join the others and use the CCIS.** There are two participation options for you to choose from; each is briefly outlined below. **Please contact Kelly Cousineau (231-750-6908 / [KellyCousineau@LeanOfficeSource.com](mailto:KellyCousineau@LeanOfficeSource.com)) to declare your desired participation option** and identify one person in your organization whom we can train (your “Contact”).

### **Option 1: Electronic User / Update System Personally**

With this option your Contact will receive a User ID and Password to log in to CCIS. Your Contact will receive email notices when:

- a new Inquiry is available for you to respond to
- an Inquiry has been approved and converted to a work order
- when payment has been issued following your electronic invoice
- any time someone makes a comment on something that is assigned to you.

Your Contact will be fully trained by our team and will have access to an online user manual for reference thereafter. Your Contact will be able to review and track all inquiries (request for quote) and work orders and will regularly update the status of all open items. Closed work orders are always available for review or printing.

As an incentive to use this option, the completion of a work order immediately generates an invoice and our Management Company will make payment within two business days.

#### **Option 2: Phone User / Management Company Updates System**

For those vendors without access to the internet, or who prefer not to personally track and update the status of their Work Orders online, this option requires phone calls to the Management Company throughout the process so they can update the status of your items in the CCIS for you. For example:

- When a Co-Owner registers a Request, the Management Company will create an Inquiry in the system and contact you requesting an estimate.
- Within 3 business days you contact the Management Company by phone and provide your quote including the cost, a brief description of the work involved and the total cost (labor and materials) which will be entered into the Inquiry in the system.
- Once the Management Company has approval they will convert the Inquiry to a Work Order and fax it to you to proceed with the work.
- As soon as your work is complete, you'll contact the Management Company by phone again so they can update the status of the item, recording the final costs.
- When the Management Company receives your invoice via regular mail, they will reconcile it with the CCIS and pay accordingly during their next payment cycle.

At any point in the future, you can easily switch from one option to the other.

In conjunction with the CCIS roll-out, we are also working to improve our service commitment to the Co-Owners. Namely we are asking you to respond within specified time limits, and we (including our Management Company) are also making new service commitments. (See enclosed Service Expectations.)

There are a multitude of benefits of the CCIS and related process for Harbour Towne, and **there are significant benefits to you, our service vendor as well such as:**

- A documented trail of Requests, including timing, approvals, etc.
- Faster turn-around on payments for work complete.
- Improved cycle time (from Co-Owner's initial Request to completion).
- Improved customer relations with Co-Owners, Board Members and Management Company.
- An information system of condo/property maintenance that spans annual turn-over of Board Members.
- Continued long term partnership with HTCA.

**We do thank you for your quality work in our community and look forward to partnering with you as together we increase our level of service to our customer base – the Co-Owners of Harbour Towne.**