

RoomSync's guide to

Portfolio-Wide Off-Campus Implementations



Contents

Why Portfolio-Wide Is Best	3
Establishing APlan	5
Phased Rollout Case Study (EdR)	6
Points of Contact	7
Going Live	8
Post-Rollout Follow Up	9
About RoomSync	10



Why Portfolio-Wide Is Best

What is the current standard industry practice for implementing new roommate matching systems?

It is most common for a property to choose a new system and get approval to implement that system separately from its sister properties. Most communities use RoomSync independently from other properties within their company's portfolio.

This has become the standard practice due to:

- Third party owned communities
- Different needs for different teams
- Demand varying by market

But, we've learned that this practice is not always best.

With the current industry practice:

- Communities don't have corporate level support.
- Processes among properties are not consistent and streamlined.
- It's all too easy for a property to fall under the radar. Issues or potential issues with RoomSync rollout may not be noticed.
- Staff turnover isn't always reported to RoomSync. Thus, the need for updated admin accounts and new admin training may not be detected.
- Companies miss out on pricing discounts. Maintaining a corporate level contract for their entire portfolio provides multiple-property deals.
- Corporate teams don't have control over how networks are set up and used.
- Corporate teams don't get regular reports on network insights at the property level.



"There are many advantages for on-site teams, management company teams, and community residents when implementing RoomSync portfolio-wide using a corporate-driven method."

*Samantha Snowden
VP of Client Development RoomSync*

Portfolio-wide rollouts offer:

- More cost effective results
- More successful implementations
- Easier systems for property level teams to manage
- A deeper partnership between management company and RoomSync
- More likely that residents will get all the benefits of using RoomSync



Having corporate level support offers the means to do things like adding a RoomSync Training Video as a required Grace Hill course – thus ensuring it will be viewed by on-site teams.

This will improve their RoomSync success.

Why Corporate Support Is Make or Break

Having support at the corporate level can mean the difference between a highly successful implementation of RoomSync and a property not utilizing RoomSync to its full potential.

Corporate support of RoomSync:

- Ensures that all properties know the importance of utilizing RoomSync
- Provides another line of communication for questions or issues
- Offers additional training resources
- Opens a stream of communication between property managers that helps to establish best practices
- Can provide company-wide marketing materials for each property, i.e. Posters, flyers, model cards.
- Gives ability to add RoomSync details to items like automatic emails that are sent to residents or community websites
- Opens the door for housing management system integration

Establishing A Plan

Portfolio-wide rollouts can be highly successful and provide essential benefits for everyone involved. But, it's important to create an organized plan for implementation and to maintain an open line of communication between RoomSync and the management company's corporate liaison.

An example plan looks like this:

1. Management company corporate team compiles network settings for all properties via a shared web-based document.
2. All questions, notes, tasks, and status updates are maintained within the same web-based document. (It can be accessed and updated by the management company team and the RoomSync team at any time.)
3. Once network settings are compiled, the RoomSync team conducts technical setup in a ***phased rollout plan****
4. A single point of contact within RoomSync systematically manages training at the property level.
 1. This is done with one-on-one training calls with on-site managers and group webinars for on-site teams.
 2. This same point of contact is available for all property teams when they have questions, technical concerns, or issues.
5. RoomSync coordinates and manages all first-time administrator credential setup.
 1. A protocol for future manager turnover is established between RoomSync and the corporate liaison.

*A phased rollout with a handful of properties being set up, trained, and taken "live" within each phase is best.

Each phase should last approximately 2-3 weeks depending on the number of properties within the phase.



Phased Rollout Case Study

EdR Trust

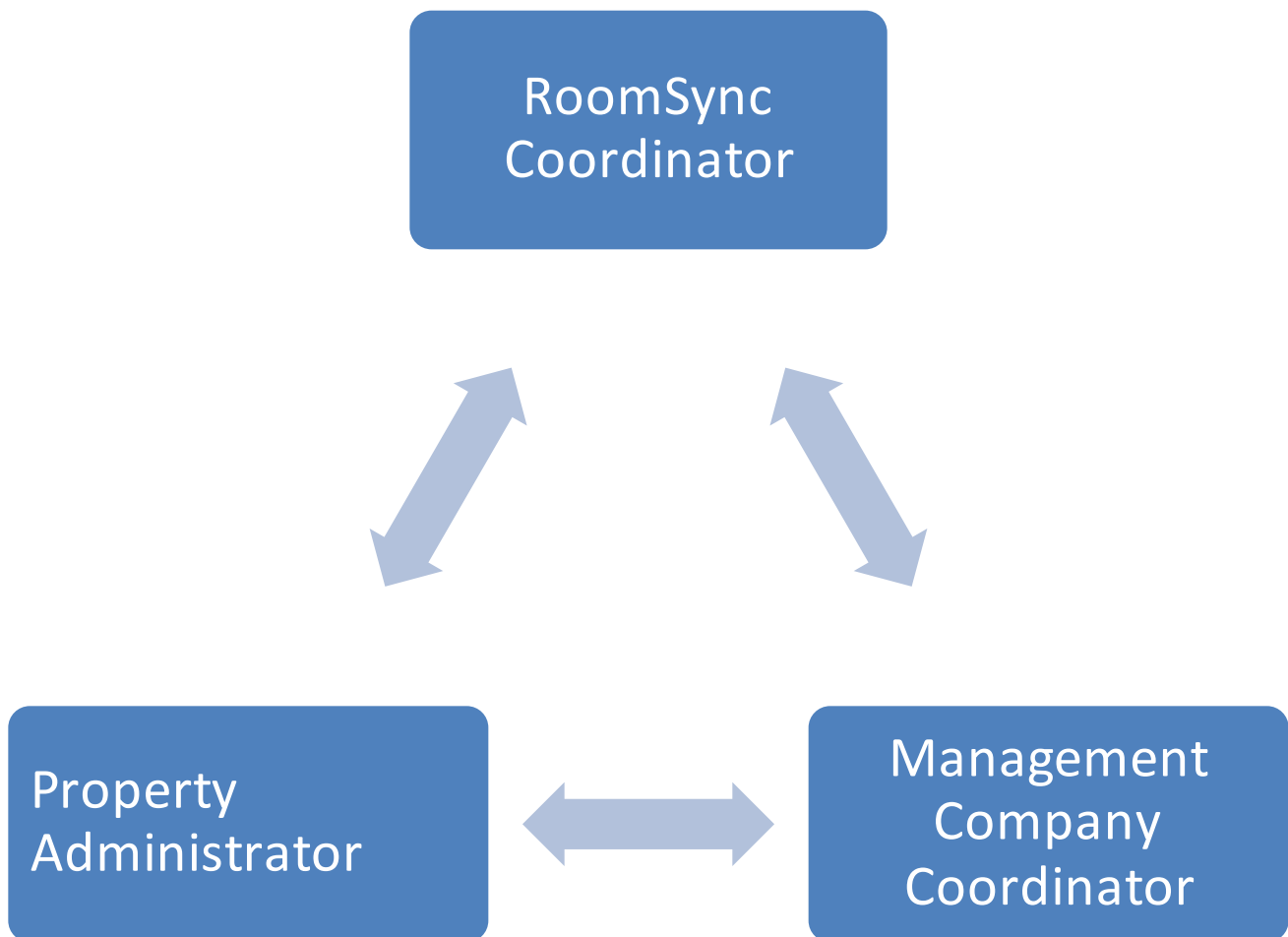
- 48 Properties
- Consisted of 5 phases starting in January 2016
 1. Early Start Properties – Properties who were more than 50% pre-leased
 2. Properties close to being 50% pre-leased
 3. Properties under 50% pre-leased
 4. Follow up with properties who already had a RoomSync contract prior to portfolio-wide rollout
 5. Late Start Properties – Properties who reached 100% pre-leased very early and would be starting RoomSync in late summer
- Phase structure allowed an immediate focus on the properties most in need of RoomSync at the time
- Follow up with communities who went live in the previous phase occurred during each phase
- All properties were live by April 7, 2016



Points of Contact

Maintaining a clearly defined matrix of communication is essential. There should be as few points of contact as possible, thus minimizing room for confusion or miscommunication. This ensures that all parties are on the same page and no small detail is missed.

Typical Communication Structure



Going Live

There are five steps needed to take a property live. With multiple property rollouts, these steps are coordinated on a group level and conducted simultaneously by phase. This means they can be completed for a large number of properties quickly and accurately. Additionally, this reduces calls and time spent for all parties.

The following steps are taken for each phase of the rollout:

(Once all steps are complete for the phase, they are repeated for the next phase.)

1. Network settings collected for all properties
2. RoomSync Tech Team configures all networks
3. Property Managers are given a link to schedule admin training call with RoomSync coordinator
4. Admin Training Call (One-On-One with each manager)
 1. Property Manager is given admin credentials
 2. Network is checked and tested for accuracy
 3. Property Manager is thoroughly trained on how to administer RoomSync
5. Once all admin training calls are complete within the phase, a group webinar is held for all on-site staff members within the phase (includes all managers and leasing team). Covered:
 1. How to market RoomSync
 2. How to answer frequently asked questions
 3. How the app works
6. All properties within the phase go live!

Why is it important to complete admin training calls one-on-one?

- Ensures manager understands how RoomSync works for his/her specific network
 - Versus a group webinar with a generic network
- Allows for undivided attention and better absorption of information
- Minimizes calls/steps taken by managers during this process
 - Admin credentials and network testing are handled in one call
- Establishes a rapport between manager and RoomSync contact
 - There is an open line of communication for future questions or concerns

RoomSync's success is determined by the on-site teams who use it.

Post-Rollout Follow Up

Once properties go live, they are systematically followed up with by the RoomSync team. A progress report is updated in the shared web-based document.

If a property's matching network is:

- Not showing an increase in users,
- Not showing an increase in match percentage,
- Not showing a recent admin login,
- Receiving a high number of user support tickets,

the property admin is contacted. RoomSync will work with the admin to see if there is something that should be tweaked with network setup.

Using this method, potential problems are found and corrected before they impact RoomSync success.

As a bonus, admins of properties that are already live can join a future group webinar if they'd like a refresher.



When a corporate office is driving the rollout...

It's important that RoomSync and the corporate team work together in follow up. They should support the communities and work to solve any issues hand-in-hand.



RoomSync is the leading roommate self-selection software available for campus housing, off-campus housing, and more. RoomSync uses innovative technology and the power of self-selection to empower its users as they find the perfect roommate. RoomSync is accessible on computers and iPhone & Android mobile devices.

RoomSync began as an idea and has since grown into a tool that is used by dozens of student housing communities and tens of thousands of students. At our company's core is the belief that empowering roommate choice leads to happier people who are more willing to work through their differences. And in the long term it means more students graduating from college. We support the Big Goal of The Lumina Foundation to increase the proportion of Americans with high-quality degrees and credentials to 60 percent by the year 2025. We believe that an important step towards achieving this goal is to improve students' quality of life through more compatible roommate pairings.

Our Core Values

EMPOWER. Great things happen when people are empowered with choice.

COMMUNICATE. Consistent, open and respectful communication leads to happier people.

COLLECT. There is power in data; the facts yield the solutions.

LEARN. Great things get even better with a strong desire for improvement and continuous learning.

DELIVER. Positive change happens through tangible results.

RoomSync has over 100 clients in the United States and Canada.

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