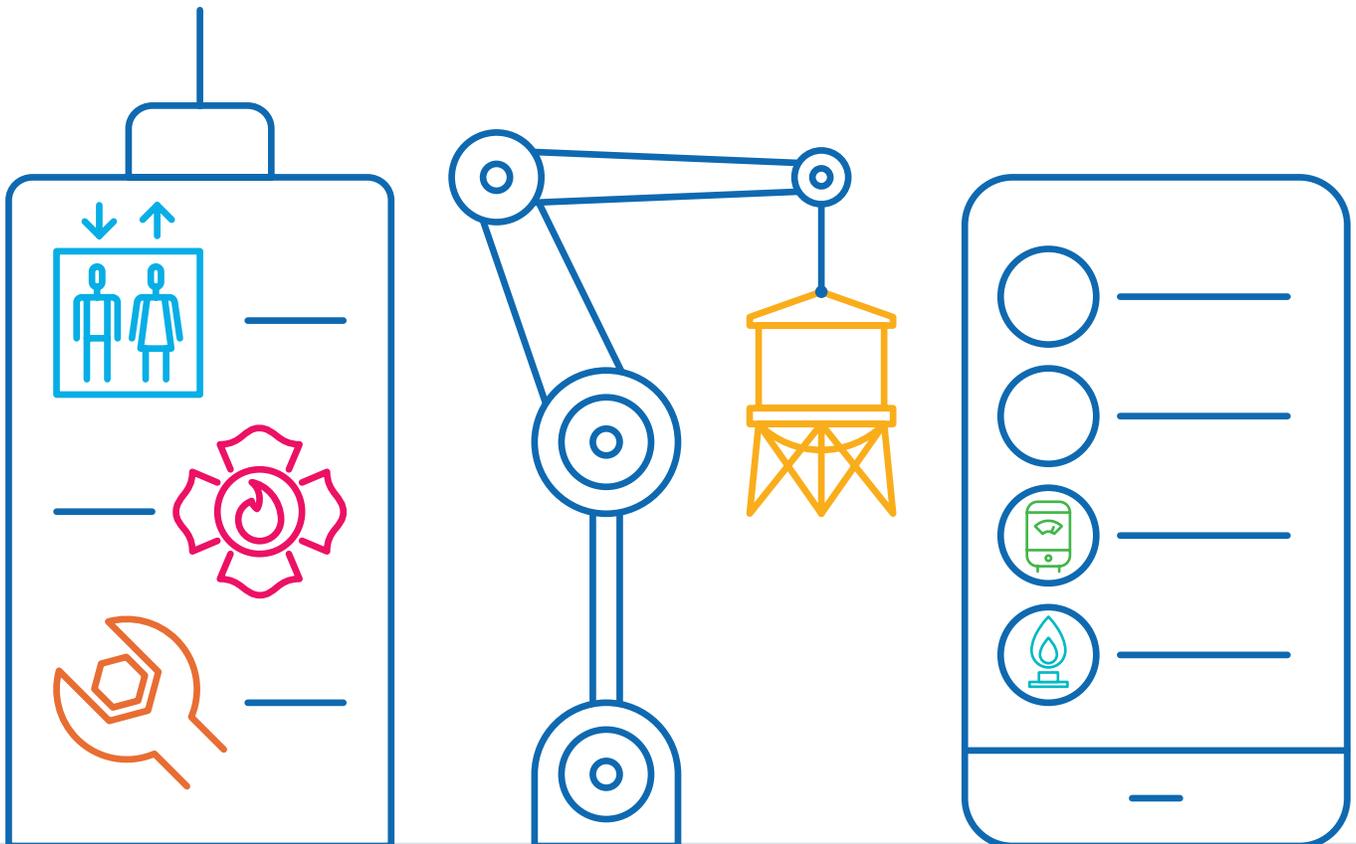# The InCheck™ Guide To Smart Automation

The Key To Executing Your Property Operations Plan, Seamlessly

The business of property management is inherently human – running properties that touch on every aspect of peoples' lives, from their homes, to where they work, learn, and play.

But human resources are limited, and sometimes limiting. Tending to the complex needs of buildings and the people within those buildings is a massive challenge that only grows as our communities evolve and change. There are only so many hours in a day, and so many people on your staff. And yet the must-do list continues to grow.

That's where smart automation comes in. At its simplest, automation connects processes and operational logistics so your team can focus on what they do best (instead of paperwork, lost messages, and other time wasters). But it doesn't stop there. Automation needs to be smart so it can understand the human side of your business – the decisions or next steps that need to happen for every scenario, project, or incident.

Simply put, smart automation is your secret weapon for building a more scalable, efficient business by improving the way you operate.

Here are **3** ways InCheck uses smart automation to help you run better buildings →

1
Work The Right Way

InCheck's Workflows clearly outline your team's Standard Operating Procedures, so work is done the right way – your way – every time.

⊞ Residential Tenant Move Out   📍 1000 S Clark St Chicago - Unit 4

OPEN

DETAILS

Title: Residential Tenant Move Out
Triggered By: Brian Sakevich
Description: This template outlines the steps to take when a tenant moves out of a residential building.

TASKS

Title	Created By	Creation Date	Assigned To	Due Date	Status
Confirm Move-Out Date	Brian Sakevich	Feb 26, 2020 1:17 pm	Frank Sputo	-	COMPLETED
Review Lease	Brian Sakevich	Feb 26, 2020 1:17 pm	Property Management Team J/S	-	ASSIGNED
Collect Final Month's Rent	Brian Sakevich	Feb 26, 2020 1:17 pm	Frank Sputo	-	COMPLETED
Obtain Proof of Moving Company's Insurance	Brian Sakevich	Feb 26, 2020 1:17 pm	Frank Sputo	-	COMPLETED
Notify Building Staff of Move-Out Date	Brian Sakevich	Feb 26, 2020 1:17 pm	Property Management Team J/S	-	ASSIGNED
Notify Leasing Team of Vacancy	Brian Sakevich	Feb 26, 2020 1:17 pm	Property Management Team J/S	-	ASSIGNED
Prepare Common Areas for Move	Brian Sakevich	Feb 26, 2020 1:17 pm	Raymond Wells	-	COMPLETED
Take Pictures	Brian Sakevich	Feb 26, 2020 1:17 pm	Raymond Wells	-	COMPLETED
Obtain Tenant Contact Information	Brian Sakevich	Feb 26, 2020 1:17 pm	Frank Sputo	-	COMPLETED
Collect Keys	Brian Sakevich	Feb 26, 2020 1:17 pm	Raymond Wells	-	COMPLETED
Change the Locks	Brian Sakevich	Feb 26, 2020 1:17 pm	Building Maintenance - Raymond Wells	-	COMPLETED

☰ View as Detailed Task List

🗑 Delete Workflow
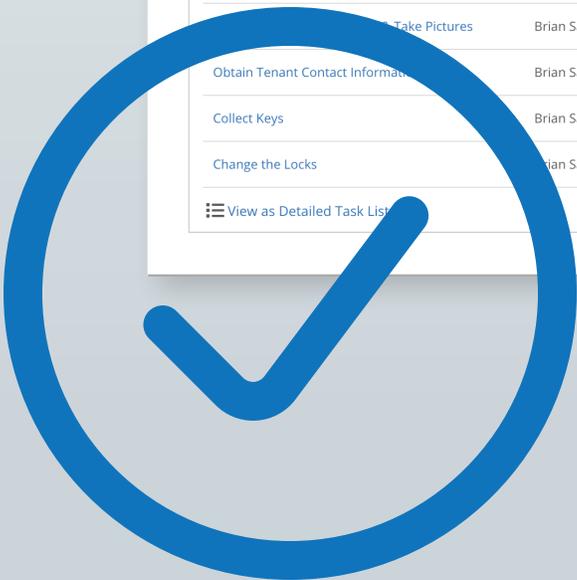
Lack of oversight can often lead to operational inconsistencies, which can impact tenant relationships or NOI. Knowing exactly what your team is doing – and that they're doing the right thing – is critical for ensuring the success of your operating plan.

That's why InCheck's Workflows take complex, multi-step projects and save them as easy-to-follow Standard Operating Procedures – ensuring that anyone on your team knows exactly how to complete specific types of work, from start to finish.

With InCheck's Workflows, everyone performs their work the way they would do it if you were there, personally instructing them.
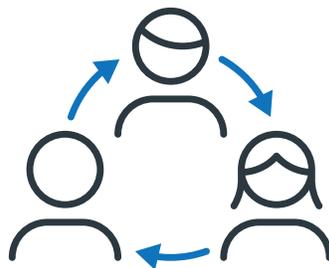
How It Works
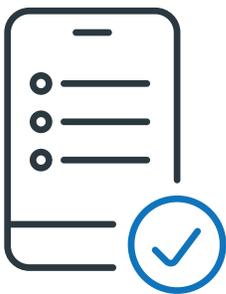
CLEAR DETAILS

Details within each Workflow clearly outline responsibilities for each step of a project. That way, even your newest staff member knows exactly how you want something handled. And if you want to make changes to any process, it's easily done and updated.

TRACKABLE STATUS

Workflows (and the individual Tasks within them) are easily tracked, so you can review the status of any project, anytime – without searching through emails, texts, or making several phone calls.
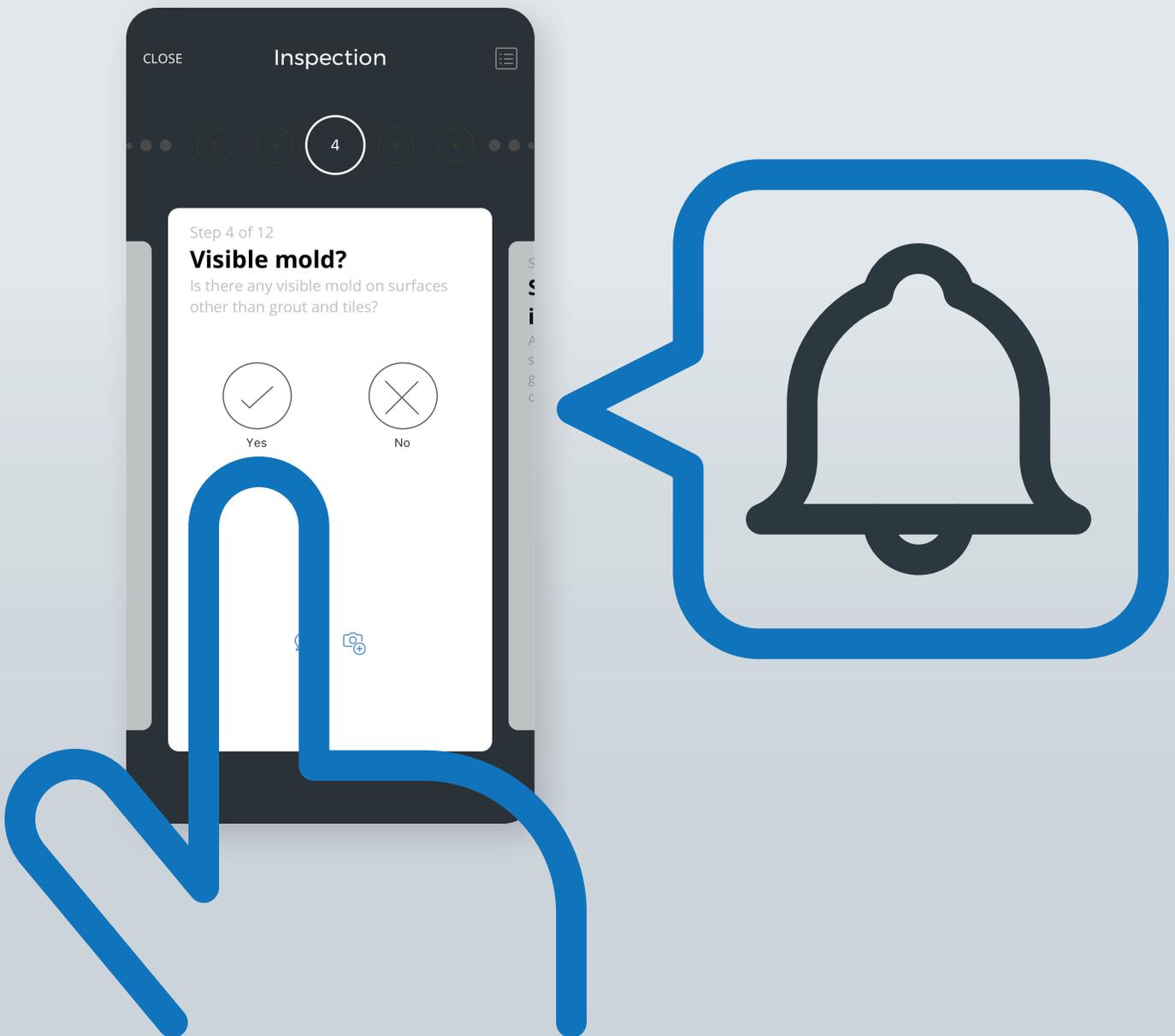

KEY ANALYTICS

Review and compare work assigned to buildings, groups of buildings, teams, or even individuals. Identify patterns and areas of improvement.

2
Assign Work Automatically

InCheck knows when specific work needs to be triggered, so it's always done on time and under budget.

There's what seems like a million things that need doing every day, at every property across your portfolio. That's in addition to all the work focused on growing your business. And if one thing falls through the cracks, it could increase your company's exposure to risk.

That's why InCheck has several ways to automatically trigger work exactly when it's needed, reducing risk at your properties and ensuring your portfolio runs like a well-oiled machine – without you having to waste time manually tracking things down.

From regular document renewals to immediate follow-ups for an onsite incident, the right Workflows are automatically assigned to your team exactly when they need to happen, without you having to lift a finger.

Key Automatic Triggers

SCHEDULED ROUTINES
Things that need to happen on a regular basis – weekly, monthly, annually, and more

UPCOMING DUE DATES
Expiration and renewal dates for key documents or projects

CHANGES IN OTHER PLATFORMS
InCheck connects with solutions like Yardi to make move-out work more automated

INSPECTION RESULTS
Trigger key Workflows and Standard Operating Procedures from information recorded in the field

INCIDENT REPORT DATA
The right follow-up Workflows are assigned based on what happened, and what's documented

3

Work The Way Your Company Is Organized

Whether you work in teams, by role, or a combination of both – InCheck is built to work the way your team does.


TRIGGER WORKFLOW ✕

① Details	② **Tasks**

TASK LIST ☐ Assign all tasks to [✕ ▾]

	Task Name	Assignee	Due Date
☰	Perform Monthly Elevator Walkthrough	Bill Williams ✕ ▲	📅 Due Date

○ All Elevators ● Specific Elevators

Inspection: *Monthly Elevator Condition Check (Eleva...*

Show Task Details

Teams
Constr...
Legal
Mainte...

Users
Aaron

✓	Assign work based on results

🔒 Requires Completion of:

Show Task Details

Perfor...

EDIT TEAM ✕

Team Name [Maintenance Team]

Users [Annabelle Oestreich ✕   Mason Sauler ✕
Dave Blagdon ✕   Sarah Dalakos ✕
Sharon Rutherford ✕]

Role
Each team can only be assigned to one property role

[Select Role ▾] [Property]

[CANCEL] [**UPDATE**]

When you want work done on time, assigning it to the right person is critical. But sometimes the "right person" is out of the office, or already has too much on their plate. And sometimes there's more than one "right person" that can get the job done.

So how do you ensure work assignment is flexible, and things happen when they're supposed to?

InCheck lets you assign Tasks to teams, designated roles, or individuals, giving you the ultimate flexibility to get work done.

Flexible Work Assignment
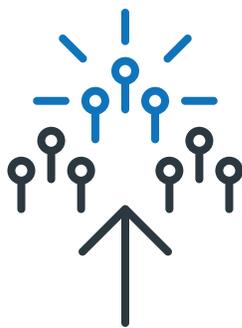
ASSIGN TO TEAMS
Tasks are assigned to a group of people, like a maintenance team or a back office team. Users can pick up and complete work as they're able, no matter who is on or off the schedule.
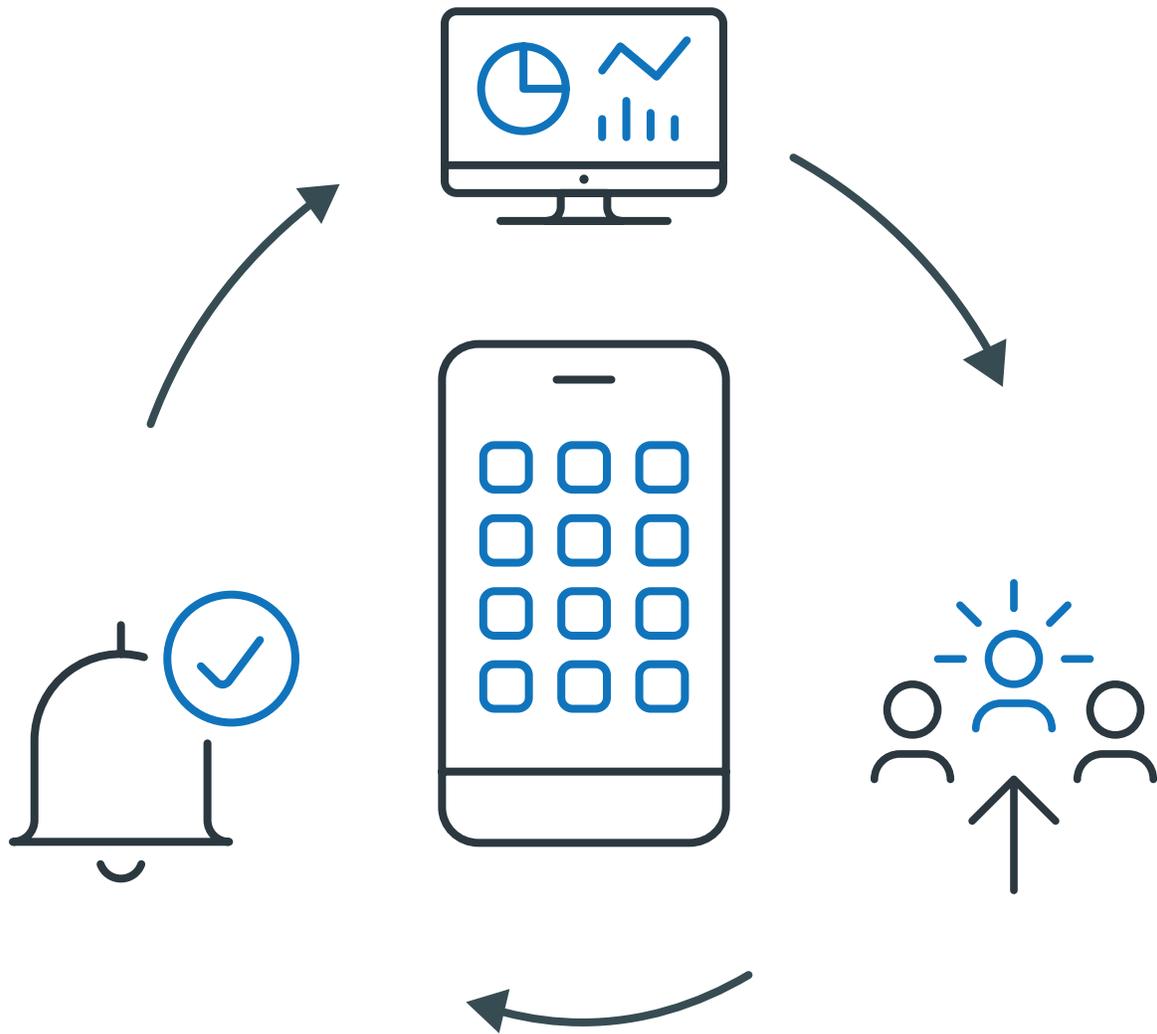
ASSIGN TO ROLES
Tasks are assigned to a specific role, like a property manager or finance manager. InCheck is smart enough to know who your property manager is at each building, so work always gets to the right person.
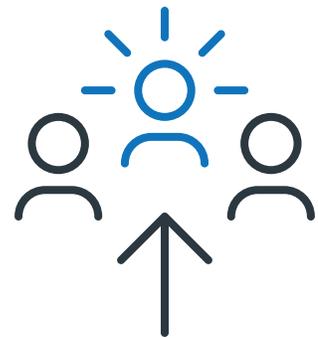
ASSIGN TO INDIVIDUALS
Tasks are assigned directly to a specific person, so they'll be notified anytime they're needed across your portfolio.

Property management teams everywhere are starting to take advantage of smart automation technology to cut inefficiencies and enforce their operations plan. Implementing solutions like InCheck puts your team at a significant advantage – not just over the competition, but for any challenges, changes, and disruptions the industry faces in the coming years.

> **"** *Our COVID-19 cleaning checklist is something we were able to do with InCheck, and have an immediate benefit...* ***WE COULD NOT HAVE DONE THIS WITHOUT THE TEAM AT SITECOMPLI.*** **"**

— **Will Smith**
Risk Manager – Progressive Management

THE ARKER COMPANIES
REAL ESTATE DEVELOPMENT

Automate the way your team operates

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