HIGH LEVEL THEMES

1. Inconsistency on signing, causing confusion. different on all 3 sections
2. Lack of visibility on the entire process, how many things I have to do and what's next (tenant portal perhaps)
3. Can't rely solely on email to provide visibility
4. Hi from goodlord in email, access your portal here which outlines next steps and highlights the whole process

BUSINESS CASE FOR TENANT PORTAL

1. As we build out the tenancy journey to include more tenant facing products (Switch, TCLI, broadband, hello fresh) we need scalability.
2. So one place for tenants to see their progress and access different elements of the journey is vital. It also improves the customer experience which is a key goal lots of our agents (**tenant success linked to agent success which is linked to our success**)
3. Better tenant experience will result in fewer tenant-related support tickets, reducing the need for more support heroes (and less escalations for success)

HYPOTHESIS

Assumption: Tenants want more visibility & control over the progress of their tenancy application.

Problem: Goodlord's current tenant journey is fragmented and opaque and does not allow tenants much interaction with their application, during or after their tenancy application.

Hypothesis: Unifying the tenant journey and providing tenants with a portal where they can check the stages / progress of their application, make & monitor payments, review & sign documents, and submit & update references will:
1. reduce the number of support tickets related to each stage of the tenant journey
2. increase trust and engagement with tenants
3. increase conversions of direct to tenant products

Measure through uptake of direct to tenant products, reviews, hits in tenant portal per tenant pre- and post- application completion.
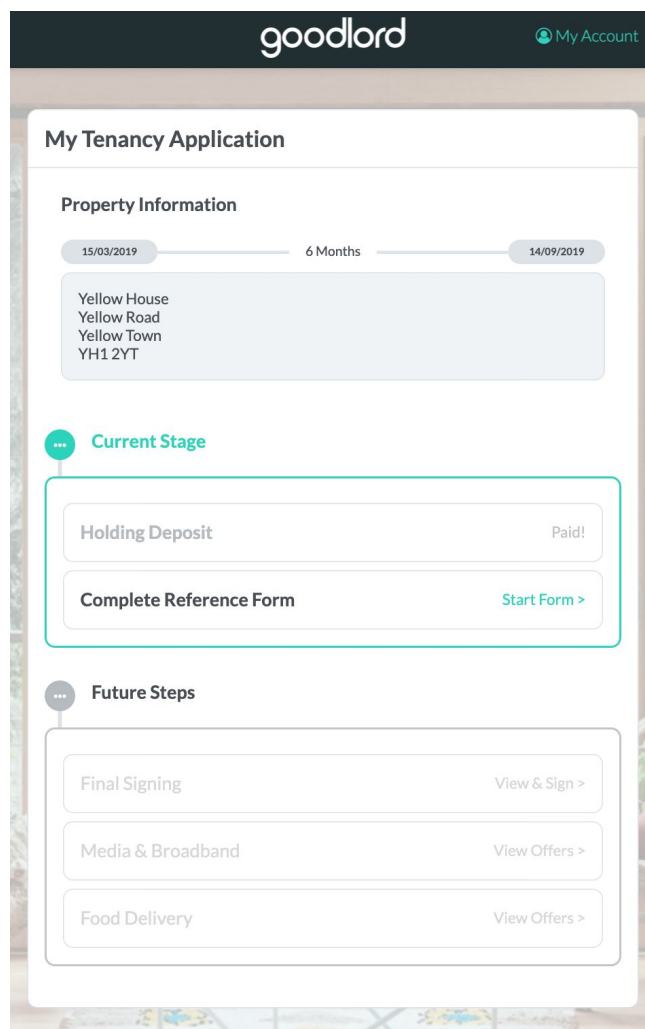*Reduce the number of support tickets related to the initial payment and final signing sections by x%.*

TESTING METHOD

Add all sections on the current Tenant Portal, and give more context on each stage (right image):
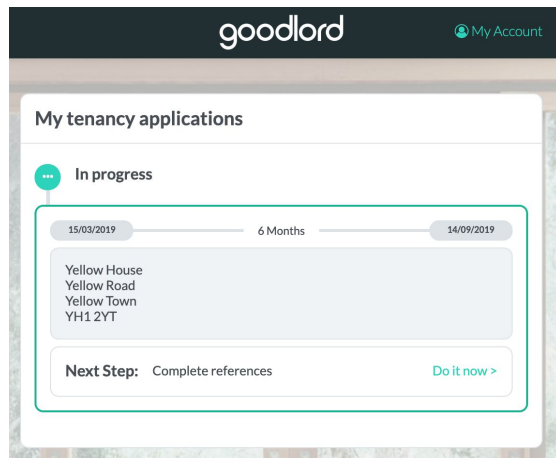
Example Mockup:

Provide a detailed introduction to what Goodlord does in the initial email. Change the current email to link to the portal at each stage and begin to instill that element of consistency.

goodlord

Hi Miss Rickatson,

Thank you for choosing to rent a property with ejrentals! We're looking forward to helping you secure

> 4 Pilgrims Close
> Farnham
> Surrey
> GU9 8QP

In order to begin arranging your tenancy we need you to create an account. Please click the button below to get started.

Set Up Your Account

For help creating an account, check out our **step-by-step guide**.

Your **How to Rent Guide** is attached to this email.

Regards,
The Team at ejrentals

Subject to Contract and References.

If you have any questions about your tenancy application, please contact **ejrentals** at: **07774873532**.

powered by goodlord

MEETING NOTES

[Recording Link](#)

Started at **4m** - Dead space on the sides

Tenant may want introduction to Goodlord on the welcome email? **5m**

Landing page **6m**
Money is being shown, before signing up. No description. Would be good to know what is happening right now. Recap on the email description?

8m40 Enter card details
Stripe popup questioned
9m30s Holding Deposit -> more description?

10m45s Payment page should be secure, not good being all on one page. Feel weird signing up and paying at the same time.

12m Popup at each stage, guide you through the process. Maybe a question mark.

Never read a contract to be honest.
14m Wouldn't click into the links.

15m30s Mixed on marketing information. Submit done.

16m Referencing is ready, serious stuff. Signals to you that you have to read it.

17m15s Stages not outlined, for an initial renter you may not remember everything. Want to know the time. Progress bar would be nice.

18m30s Would like a Please note more explicitly. Images too, text is a block heavy.

20m Would be frustrated to if I got to passport and forgot I needed it, does it save?

21m30s Interaction is nice, looks really nice. Like that postcode is easy to find.

22m Tick on each section, is nice, give a visual and small sense of achievement.

23m make it more friendly like hey this is your first payment.

23m30s Went off that image, didn't look at the checkboxes, zoom in circle, graphic is v useful.

24m20s Unemployed why another occupation (confused). Switches aren't being turned on. Don't know why there is switch.

25m50s Blegh on the amount of text. Probably to just sign. Bullet points might be better as checks for confirmation.

27m Sign box is different, text is different. Lack of consistency on the box. Docusign is legit, date is there and arrows.

28m. Doesn't scream serious, looks nice but not the best. Not understanding the enormity of this section. Something in bold.

30m Click your account probably. 48h window, does it include weekends?

30m30s Emails sent with contract. Blue button, energy might be better defined separately. Didn't read the paragraph.

32m Why am I being asked for utilities when it said view and sign tenancy agreement? CTA said sign but the first thing is energy switch.

34m20s Feel like I've been missold the journey. Goodlord journey hasn't been explained at the start. Explain the journey initially.

36m15s Estimated timeline of how long things will take. I would think that signing the declaration I would be done.

37m30s House is important, more likely to read. Read the large benefits of Switch.

38m What is octopus energy? Logo helpful.

39m45s Why should I pick Switch? Potentially more information. Know the benefits, but not sure what to compare it to. Time normally taken vs how long is switch. Want to know the shitty alternative.

41m15s Number is really nice, to show the estimated billing.

42m15s. You could get this by flicking a switch.

44m Signature box different again.

45m30s Am I paying utilities now?

45m45s. Nicely laid out payment page. But confused on what needs to be done before clicking submit.

46m45s Am I paying the bank transfer now? Should be on payment page.

47m30s Can you come back to this in the next few days.

Feedback from Frampton Roeback

The fact that slides 3 & 4 in the presentation have notes on the right hand side to better explain what the tenant is required to do further backs up our opinion.
- The welcome email to tenants should clearly mention the 'Tenancy Guide' which they will shortly be expected to review and sign. It does not.
- The 'Tenants Signup page'.
  - To go from a pleasant and informative welcome email, to this page, does not continue the good first impression and has so far only prompted our tenants to call us to find out "what am I supposed to be signing?"
  - In my opinion, some better explanation, or at least some minimal guidance on the page should be provided to advise tenants what they're expected to do.
  - Rather than the blunt and to-the-point:
    - Give me your password
    - Give me your bank details
    - Sign here.
  - On the button to 'Download and View', surely its simple enough to add the words 'Tenancy Guide' to the end?! - Exactly the same as it does later in the process, when they get the prompt to 'View and Sign TENANCY AGREEMENT.
  - The fact that there is a tick box immediately below the 'Download and View' button (the button which should refer to the tenancy guide), asking that 'I have read and agree to the tenancy agreement' instantly led me to think that the mystery button was exactly that – to Download and View the tenancy agreement.
  - Surely the last thing on the page should be the payment section. Which would mean they're more likely to have clicked the mystery download and view button, rather than them calling me (thus not streamlining our processes – and therefore not achieving our primary objective!)