Building efficiency in property management

Carter Jonas

The multi-disciplinary property consultancy Carter Jonas has completely transformed its property inspection process using Esri's ArcGIS system. The new end-to-end solution removes 25,000 hours of manual administrative work every year and enables the business to provide a more efficient and sustainable service for clients.

The Challenge

- Time-consuming paper-based inspection process
- No consistent, nationwide approach or centralised data

The Benefits

- 25,000 hours saved annually
- More cost-efficient property maintenance
- Reduced carbon emissions due to standardised process
- Improved data security and data currency

The Challenge

Carter Jonas manages large portfolios of commercial, residential and rural property on behalf of its clients, many of which have hundreds of individual properties all around the country. As part of these property management contracts, the organisation carries out more than 5,000 property inspections per year, including condition and hazard inspections for tenanted homes.

Historically, all these inspections were completed using paper-based forms. It then took asset managers up to six hours to type up the survey data when they got back to the office and attach pictures to their reports. This manual process was not only time-consuming, but also resulted in inconsistent approaches across different teams in the UK and, as data wasn't centralised, it could not be easily analysed to identify common issues across large property portfolios.

The Solution

Carter Jonas had recently migrated to the ArcGIS Enterprise system, hosted on Azure in UK-based datacentres, after using ArcGIS desktop applications for several years. When a new team was established at Carter Jonas with the specific remit to advance the use of digital property management solutions within the business, a plan emerged to harness the capabilities of ArcGIS to build a new, fully integrated, end-to-end digital solution for property inspections.

Now in use across Carter Jonas' 34 offices nationwide, the new solution has replaced paper-based forms with a series of digital surveys, built with ArcGIS Survey123 and ArcGIS Field Maps. Asset managers capture inspection information on their smartphones while at client properties and attach pictures. All the inspection data is uploaded directly to a centralised ArcGIS database, where it is combined with data from the company's property management system, as well as contextual geospatial data from the Esri Living Atlas of the World and Esri UK Premium Data Services.

When back at their desks, asset managers then use a web app known as Survey Manager to view and edit the inspection data. Built using the ArcGIS API for JavaScript, Survey Manager allows asset managers to explore large property portfolios on a mapping interface, click on individual properties to view inspection data in a familiar template format and simply tap a button to export pdf reports.

As an extension to this core process, Carter Jonas has also built a number of ArcGIS Dashboards and web apps that give asset managers a high level oversight of the progress of inspections and any issues highlighted across large property portfolios. The integration of property management and inspection data enables asset managers to analyse inspection findings, monitor rent arrears and access documentation, such as gas safety certificates, all from one screen. In the future, the organisation plans to further integrate its inspection data with data from indoor positioning systems, drones and remote sensors, creating digital twins that will help it manage properties throughout their lifetime.

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Simon Nigh, Head of Geospatial Services, Carter Jonas
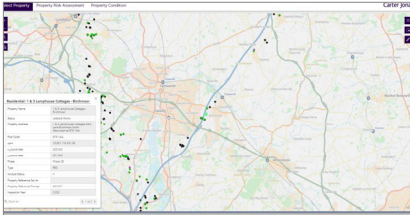
Carter Jonas' Survey Manager solution, built using ArcGIS to improve the management of property inspections

The Benefits

25,000 hours saved annually

Using the new digital inspection process developed with ArcGIS Enterprise, Carter Jonas can now produce inspection reports in 45 minutes, rather than 4-6 hours. It is consequently saving around 5 hours per report, which equates to 25,000 hours of staff time per year or 12 full-time positions, based on the average figure of 5,000 annual inspections. "The time savings that we are achieving are freeing us up to spend more time interacting with tenants and delivering an improved level of service for our clients," says Simon Nigh, Head of Geospatial Services at Carter Jonas.

More cost-efficient property maintenance

Using the Survey Manager portal and ArcGIS Dashboards, asset managers can now easily identify similar issues across multiple properties and help their clients to reduce maintenance costs. For example, asset managers would be able to see if twenty properties nationwide have faults with doors, enabling the client to order twenty new doors and take advantage of bulk purchase discounts. "Because all our inspection data is stored in one place, in the same format, for the first time, we can query it more easily," Nigh explains. "Our new ArcGIS inspection process gives us a better understanding of issues across large property portfolios, enabling us to provide more valuable information to our clients."

Reduced carbon emissions due to standardised process

As all inspections, for all clients, across all regions of the UK, are now conducted using the same, consistent digital process, asset managers can inspect any property, not just the properties within a specific portfolio. Carter Jonas is, therefore, beginning to allocate inspection jobs to the asset managers that live closest, significantly reducing journey times, cutting carbon emissions and supporting the company's desire to operate more sustainably.

Improved data security and data currency

Carter Jonas no longer holds client data relating to inspections on a plethora of paper forms, which reduces data security risks. Furthermore, its new end-to-end ArcGIS process also ensures that up-to-the-minute inspection data is captured centrally in near real-time, without the delays associated with typing in information manually. "Data security and data currency are key considerations for clients," Nigh says. "We now have a very secure way of collecting and handling inspection data and have confidence that the data in our system is absolutely up-to-date."

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