



*Veritas mature into market-leading property services provider.*

With Salesforce by Performa IT



# Veritas Statistics

- Established 2005
- Specialists in void property services in the UK
- 28 000 properties under management
- > 700 clients
- > 1500 alarm responses per annum
- Turnover £16m 2019/2020

## Value added by Performa IT

- Engaged in January 2020
- Road-mapping exercise
- Standardisation, App integration, customisation, historical report specification
- On-going Salesforce maintenance and support
- Agile development approach
- Client-facing process improvements



DEBENHAMS

# *Veritas' Background with Salesforce*

From its inception in 2005, family-run business Veritas set out to become the leading services provider for the void property sector.

This included investing in the best web-enabled IT platform that was available to form the core of the business's applications.

Here Veritas' IT Manager Stewart Boraston describes the company's journey with Salesforce – and how Performa IT have supported them most recently in maximising the value from their investment.



# ***Veritas' Challenge: they had outgrown their initial Salesforce provision***

Outlining the scope of the existing Salesforce framework Stewart says: "Salesforce forms the backbone of the Veritas business in terms of resource planning, asset management, work planning and implementation and CRM.

"Since I joined in 2019 the company has grown substantially, doubling our turnover and the size of our Senior Management team, and beginning to attract bigger contracts in the property services sector.

"Our existing Salesforce deployment was made up of lots of bolt-ons. As the company grew, we needed to carry out a massive overhaul to enable the system to support the rate of expansion without introducing additional administration spend."



# *Veritas' requirement: streamlining the operation*

"To support our growth we really needed to make sure that our operating processes and procedures were standardised across the whole of the business," explains Stewart.

"We wanted to leverage the Salesforce platform to get the best we could out of the number one CRM system – and achieve our objective of being the number one void property services provider.

"We needed an industry savvy Salesforce partner who could take a holistic view of our business and pinpoint the areas we needed to address to help us consolidate our investment."



# Why Performa IT?

Commenting on the selection process Stewart says: "I found Performa IT very easy to talk to."

"Coming from a development background myself it was good to have direct access to a technically knowledgeable team who could plug the Salesforce skills gap for Veritas."

"Internally within the business we knew what we wanted. We didn't need business analysis consultancy to pick over our requirements."

"What's great about the Performa IT development team is that I can tell them what we want and they can guide us on how to achieve it, either out of the tin, or through customisation."

"We have some decent challenging discussions about maximising results out of Salesforce – and minimising costs!"



# *Performa IT implementation approach*

“Describing the first steps Performa IT took Stewart says: “The team helped initially in road mapping where we wanted to get to.

They took a close look at our existing set up and quickly got to know and understand how we operate.

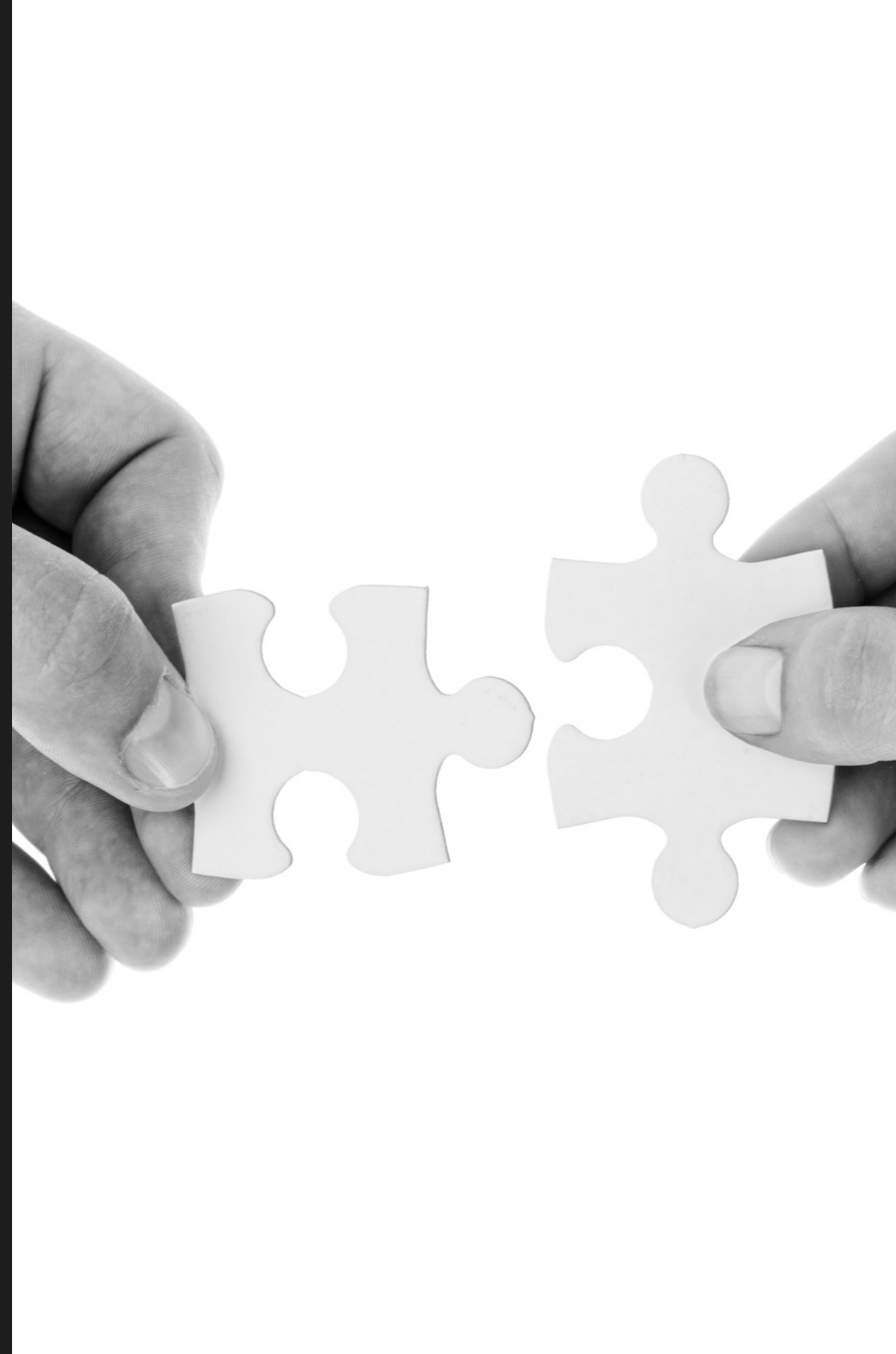
“As developers Performa IT work in a very agile manner, quickly translating business requirements into system functions that are very test-driven.

“This means that we got moving quickly and didn’t get bogged down in traditional waterfall releases which might no longer satisfy shifting business requirements.”



# *Solutions*

As part of their on-going relationship with Veritas as the Salesforce development team, Performa IT have addressed numerous discrete projects ranging from implementing Salesforce extensions, integrating apps, specifying historical reports and financial updates, managing and validating the suitability of sub-contracting partners, and standardising job categories.





# For example:

## App Integration

Thanks to Performa IT's integration of the job management app Fastfield Veritas is now able to automate the despatch and receipt of information from sub-contractors.

"Prior to this we were dependent on our contractors filling out the Fastfield forms with the required data which we were then re-entering into Salesforce," Stewart explains.

"Not only was it time-consuming and prone to error it was also exposing us to liability around our contractors' activity. The app integration means we can push the right information and forms to the contractor, so they have clearer ownership and accountability around their specific task.

"This is significantly de-risking how we work with contractors. Not only does it make their life easier, it also means we have greater control over contractor activities like maintenance tasks and vacant property inspections."

## Partner management

Another aspect of improved quality assurance and compliance is in sub-contractor validation.

"Performa IT have customised our partner management functionality to enable us to keep track of our contractors' public and employee liability insurance status within Salesforce," says Stewart.

"As a result the system prevents us from sub-contracting to inadequately insured partners.

"Now if a contractor wishes to work for us they have to supply the right insurance information to qualify."

# Benefits of working with Performa IT

## Cross-industry knowledge

Without their own in-house IT development team Veritas is benefiting enormously from Performa IT's multi-industry Salesforce expertise.

"Not only can Performa IT advise us on how other Salesforce clients are tackling things, they can also recognise all the touchpoints across our own system and quickly analyse the impact of the updates we wish to make," says Stewart.

"This level of awareness and understanding is extremely valuable and helps us make decisions."

## Leveraging the Salesforce investment

Veritas have made a long-term commitment to the Salesforce platform, including upgrading its licensing. It is now Stewart's responsibility to ensure the system delivers maximum value to the business.

"We need Performa IT's skill in automating, customising, and standardising in order to achieve this," he says.



# Benefits of working with Performa IT

## De-risking and driving up industry standards

"The work Performa IT have delivered to reduce our exposure in sub-contractor relationships is setting new standards," says Stewart.

"As sub-contractor quality increases so will client confidence. We are leading the way in sector compliance and SLAs."

## Enhanced competitive edge

"We are using Salesforce very actively to help us deliver client peace of mind and ease of experience," Stewart says.

"We need to be efficient and proactive in our service, and we need to rely on our IT platform to achieve this.

"Salesforce gives us the control and the standard procedures to ensure that we can meet our SLAs within an hour, even in remote areas."



# *New Possibilities arising for Veritas from Performa IT's Salesforce expertise*

Now that Veritas are getting a better handle on their internal processes and procedures, attention is turning to how Salesforce supports their client-facing activities.

Performa IT will be developing several new functions including unified invoicing; making improvements to the product catalogue and quoting process; as well as making greater use of the Leads and Opportunities functionality.

"These are all important in establishing Veritas as the most trustworthy and professional service provider in the commercial property space," says Stewart.

But perhaps the biggest step forward will be the introduction of Salesforce's Experience Portal, giving Veritas' clients real-time access to property management data.



**“Showing our clients that we have the confidence to be transparent with our Data and Services is a huge boost to engagement and trust,” comments Stewart.**

*Stewart Boraston*



# Recommendation

By way of recommendation Stewart says: "Performa IT are a unique team of individuals who work at your pace to cater to your requirements.

"In the current climate we need Rapid Application Design to stay ahead of our competitors and respond to our clients' needs. Performa IT have proved to be flexible and adaptable in translating requirements into tangible functions.

"They have their customers' best interests at heart and are not interested in just ticking boxes.

"Performa IT have sufficient product and industry knowledge to challenge constructively and bring their best ideas. You will never miss an upgrade or update and can have the utmost confidence in the integrity of your customisations."





## ***Performa IT says***

**“Veritas made the choice to put Salesforce at the heart of its IT provision and are tireless in getting the most out of it to achieve their market-leading objectives. They are a joy to work with as they know what they want to achieve and appreciate an agile approach.**

**“We are proud to form such a dynamic collaboration with Veritas and look forward to supporting their Salesforce deployment into the future.”**



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