SOLUTIONS HANDBOOK 2025

iamproperty | Marketing Toolkit | CRM | movebutler | Auction

WELCOME

Your go-to guide for everything you need to know.

IAMPROPERTY ECOSYSTEM

A future with an integrated ecosystem of solutions where agents can manage their whole day – everything under one roof, one central login, one partner relationship.

Our ecosystem will give agents a central intuitive system that works flexibly around their business to give them a single view of their clients, bring more speed and security to every transaction and more efficient processes that makes them money and doesn't cost them money.

See the brandbook for more details on our messaging

Press play to watch our vision video

- iamproperty Ecosystem
- Ecosystem Proposition
- Why iamproperty
- Awards & Accreditations
- What our Agents say
- Competitor Landscape
- Audience Personas

A PARTNER FOR TODAY AND TOMORROW

At iamproperty we create Next Gen Agency solutions to give our agents the freedom to do what they do best and accelerate their success. With an ambition to lead the market with our ecosystem of solutions, where our agents can manage their whole day, we are the perfect partner – today and tomorrow.

As UK leaders in property technology and pioneers of the Modern Method of Auction, we know that innovation is so much more than a tech platform. It's about empowering you through collaboration, with a win–win relationship that makes a real difference to your business and success for you and your clients. With everything under one roof and one supplier relationship to manage, we truly become an extension of your team. You might not know it yet, but we could be your missing piece.

Working in partnership with our team of over 700 experts, more than **6,500 Estate Agency branches** across the UK already benefit from our Next Gen solutions and comprehensive range of award-winning services.

VISION AND BRAND MESSAGING

- iamproperty Ecosystem
- Ecosystem Proposition
- Why iamproperty
- Awards & Accreditations
- What our Agents say
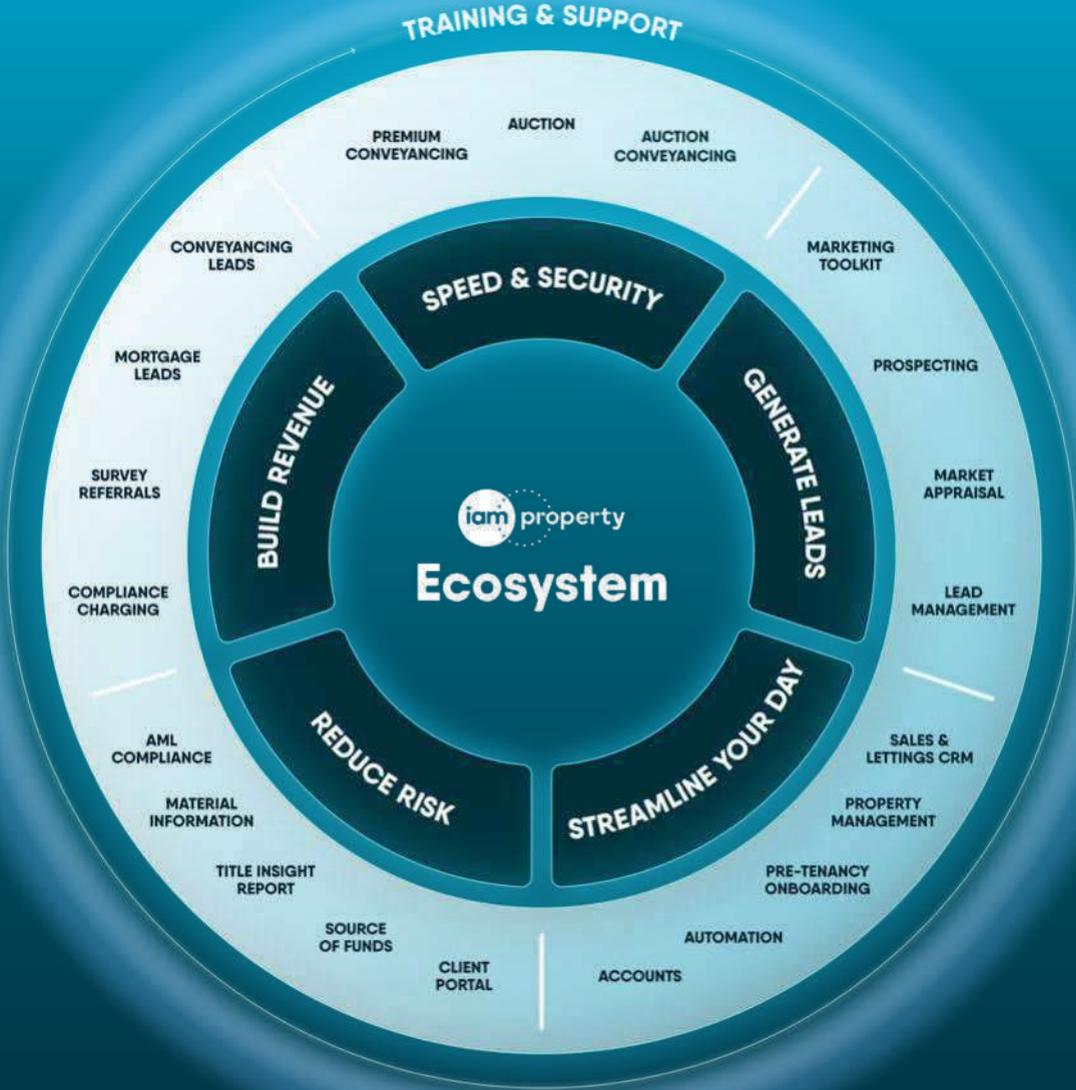- Competitor Landscape
- Audience Personas

WHAT DOES OUR ECOSYSTEM OFFER?

Our solutions work behind the scenes to give agents choice and control, with a toolkit that ensures they have everything they need to manage their business, team and clients.

Our solutions already save agents time, reduce their risk, build additional revenue streams and help them to delight their clients.

Our solutions have speed and security at their heart, which improves the home buying and selling process for everyone, keeping agents one step ahead and freeing them up to do what they do best.

TRAINING & SUPPORT

PREMIUM CONVEYANCING
AUCTION
AUCTION CONVEYANCING
CONVEYANCING LEADS
MARKETING TOOLKIT
MORTGAGE LEADS
PROSPECTING
SURVEY REFERRALS
MARKET APPRAISAL
COMPLIANCE CHARGING
LEAD MANAGEMENT
AML COMPLIANCE
SALES & LETTINGS CRM
MATERIAL INFORMATION
PROPERTY MANAGEMENT
TITLE INSIGHT REPORT
PRE-TENANCY ONBOARDING
SOURCE OF FUNDS
AUTOMATION
CLIENT PORTAL
ACCOUNTS

SPEED & SECURITY
GENERATE LEADS
BUILD REVENUE
STREAMLINE YOUR DAY
REDUCE RISK

iam property
Ecosystem

- **iamproperty Ecosystem**
- **Ecosystem Proposition**
- **Why iamproperty**
- **Awards & Accreditations**
- **What our Agents say**
- **Competitor Landscape**
- **Audience Personas**

***Click the links to learn more.**

EVERYTHING UNDER ONE ROOF

We provide agency solutions that save time, reduce risk, build additional revenue streams and delight our agent's clients. With speed and security at their heart, our solutions improve the home buying and selling process for everyone, keeping everyone one step ahead and freeing our agents up to do what they do best.

OUR SOLUTIONS AND CAMPAIGN MESSAGING

DISCOVER THE POWER OF AUCTION

Power-up your portfolio and succeed in any market, with fast, secure and transparent sales. Expand your services with our no cost Auction solution, and win more instructions, delight clients, maximise revenue.

GETS YOUR CLIENTS MOVING FASTER

Offer a seamless digital onboarding experience with movebutler — streamlining Compliance, Legal Preparation, and Surveys to save time, stay compliant, and get paid faster.

MAKE YOUR OWN RULES

Finally, a CRM as unique as you. Built to put you in control, you can manage your agency your way. It's flexible and it's cloud based. It gives you the tools to grow your agency, streamline your processes and delight your clients.

Everything you need, without breaking the bank. With Sales, Lettings, Property Management and Accounts as standard. It's the smart choice for forward thinking Estate Agents.

STAND OUT PROSPECTING

Win more instructions and grow your market share. From lead generation to standout Market Appraisals, it's everything you need to win more business with ease.

IAMPROPERTY MESSAGE HOUSE

We want our Partner Agents to benefit from using the iamproperty ecosystem to accelerate their success, so we lead with iamproperty.

What do we mean by that?

At a brand level we want to ensure agents understand and feel inspired by our vision and our position in the market as leaders and pioneers, and recognise the benefits our solutions already bring. It's about raising awareness and ensuring agents clearly understand 'why iamproperty' first, and everything we have to offer – as that's what really makes us stand out against the competition!

This doesn't mean we don't talk about our individual solutions directly with agents, or that products and services don't feature in our campaigns; it means that we take agents on a journey to help them understand why they should choose iamproperty and how we can help them succeed, before positioning our individual solutions.

VISION LEVEL	BRAND LEVEL	SOLUTION LEVEL	CAMPAIGN LEVEL
FUTURE FOCUS A partner for today and tomorrow. Grow with us, innovation proven track record, ambition. A future for agents with one integrated ecosystem of solutions, everything under one roof, one central login, one partner.	**TODAY – WHY IAMPROPERTY** Accelerating Agent Success (proof points). Missing piece – everything under one roof, one supplier relationship, industry wide solution (toolkit). Win win innovation relationship – quality, proven track record, stay one step ahead (proof points). Agent support / success hub / agent champion / agent voice	**IAMPROPERTY LED – WHY OUR SOLUTIONS** Solution led (tools, toolkit, choice and control). *Speed, Security, Save Time, Make Money, Reduce Risks, Stay Compliant, Stay in control, Free agents up to do what they do best...'Accelerate their success'.	**CREATIVE LED MESSAGING, SITTING WITHIN THE ACCELERATING AGENT SUCCESS CAMPAIGN** **iamproperty led** movebutler – Get your clients moving faster. Auction – Power of auction. CRM – Make your own rules. Marketing Toolkit – Stand out from the crowd. Our products and service have their own message frameworks which are designed to help agents understand key features and benefits in more detail.

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STREAMLINING PROCESSES

We're releasing more and more functionality to help link our systems together and start developing a true ecosystem. Reducing dual keying and sharing more information between our solutions. The aim is to make the process of using multiple solutions easier and give agents better insights into clients and services.

movebutler:
We streamlined the property client details entry and made the compliance status available within CRM so agents don't have to switch between solutions as often. More info
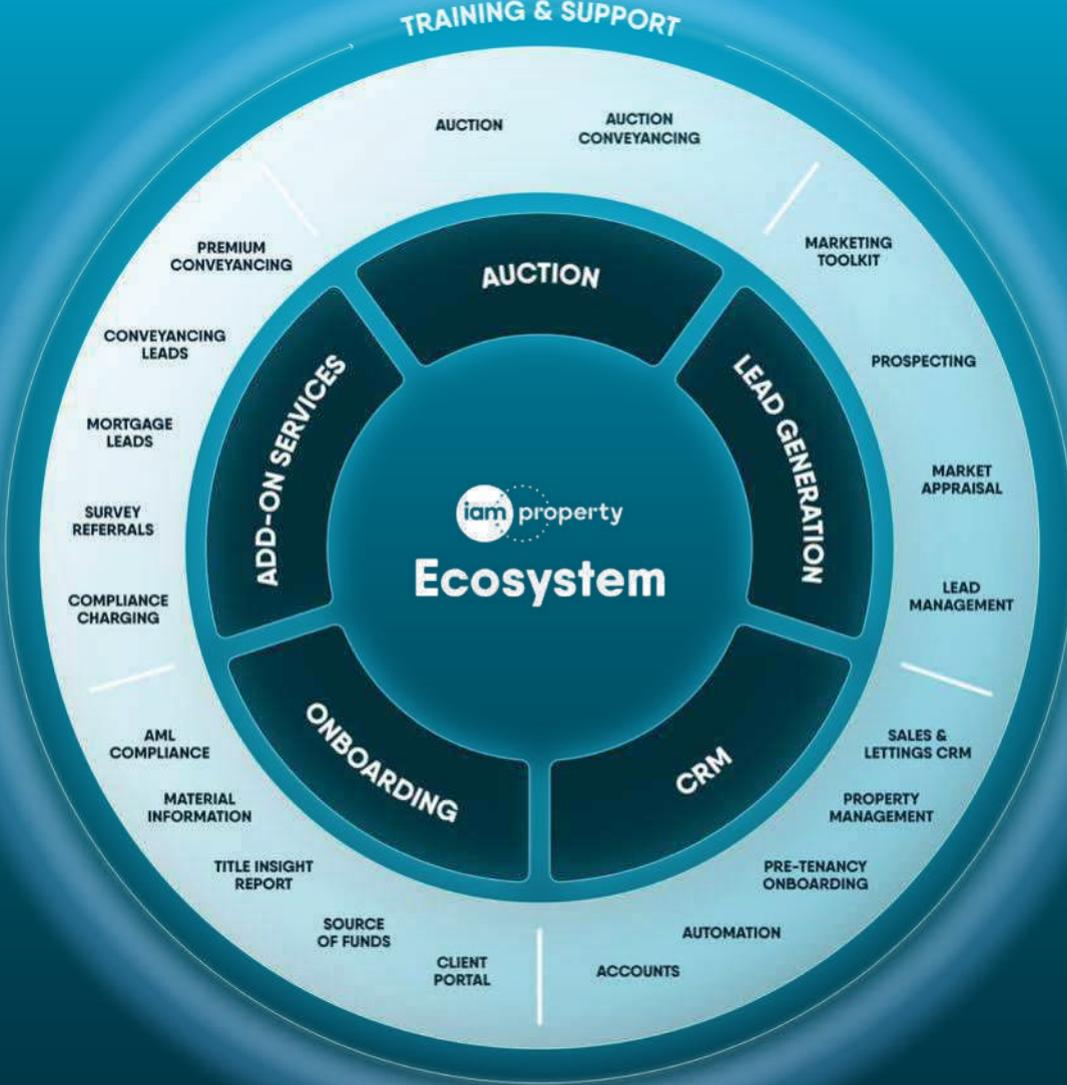
iamsold:
We streamlined the property client details entry and viewings added to CRM will be automatically added to linked properties in iamsold every evening, so they'll only enter them once. Changes and cancellations will be sent through every evening, reducing duplication and making the whole process more efficient. More info

Marketing Toolkit:
Access with single sign on from CRM or the my.iamproperty homepage. More info

TRAINING & SUPPORT

AUCTION
AUCTION CONVEYANCING
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SALES & LETTINGS CRM
MATERIAL INFORMATION
PROPERTY MANAGEMENT
TITLE INSIGHT REPORT
PRE-TENANCY ONBOARDING
SOURCE OF FUNDS
AUTOMATION
CLIENT PORTAL
ACCOUNTS

ADD-ON SERVICES · LEAD GENERATION · ONBOARDING · CRM

iam property

Ecosystem

iamproperty Ecosystem

+ Ecosystem Proposition

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*Click the links to learn more.

MAXIMISING OPPORTUNITIES WITH OUR AGENTS

Drive auction opportunities:
Agents can use our other solutions support auction sales.

With the Marketing Toolkit, our agents have access to auction templates. They can use our prospecting trigger campaign, based on key auction triggers within the marketing toolkit which will help our partner agents to maximise exposure of auction at the lead generation stage.

movebutler method of sale audit gives clients the opportunity to switch to auction, if private treaty is not working for them. Find out more

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SUPPORTING AGENTS TO SUCCEED

+ On-demand training, with comprehensive training and support on our agent Success Hub.

+ Dedicated Account management and Product Specialists on hand when you need them.

+ There when you need us with in-platform and solution specific technical support.

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SUCCESS HUB

Dedicated to accelerating Agent success.

Giving agents a central intuitive system that works flexibly around their business, with a single view of their clients, bringing more speed and security to every transaction and more efficient processes that make them money and not cost them money.

Success Hub gets your agents set up for success with bite-sized on-demand training videos and support, to fit around their busy schedules. With a range of 5-minute videos, snappy quizzes, useful guides and structured courses, our agents will have everything they need to develop their skills and build confidence in our ecosystem of products and services.

Launching with SSO from the iamproperty dashboard, the Hub is now easily accessible and covers topics from Auction to movebutler and Marketing Toolkit.

> "Watching the bite sized training videos on the hub has kept me up-to-date with auction and has given me so much more confidence when speaking to vendors about Auction. Since accessing the Success Hub, I've won five auction instructions and three have already sold!"
>
> **Laura,**
> Sales Negotiator, Nestled Estate Agents
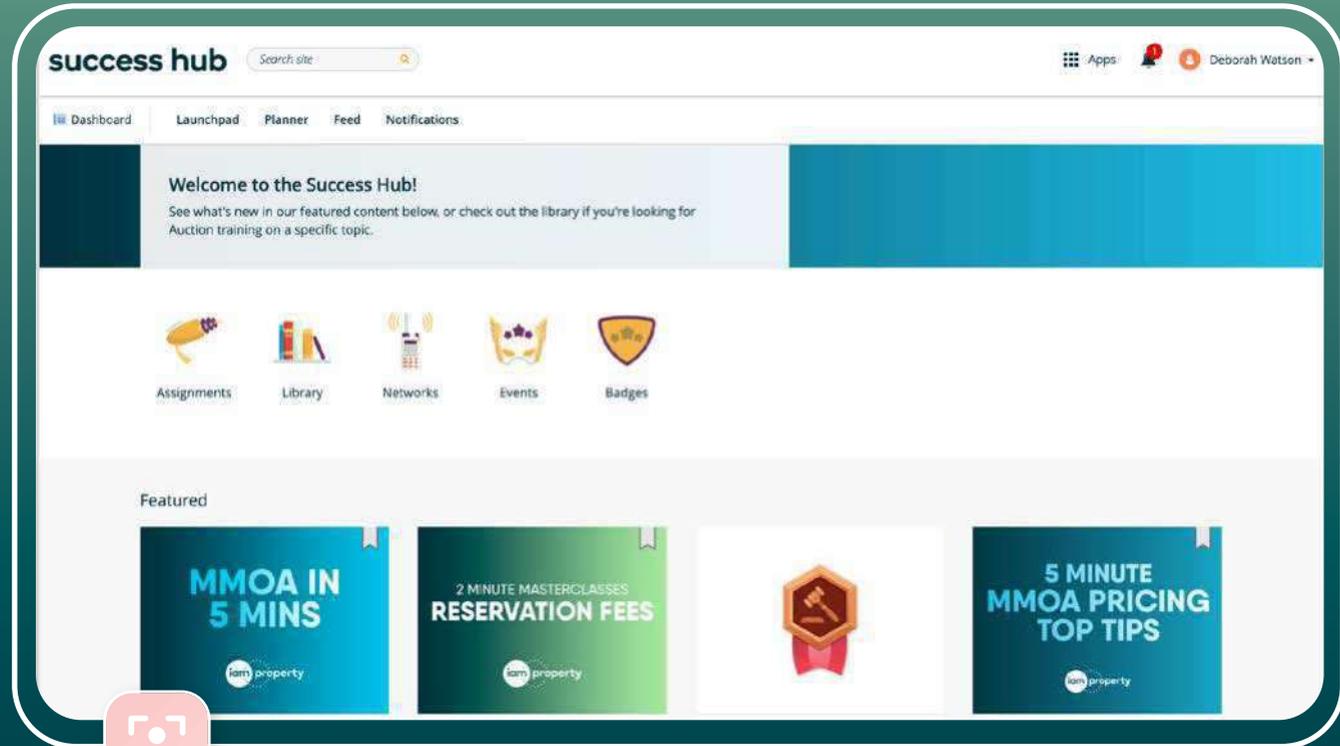
The Success Hub is dedicated to Partner Agents.
Take advantage of our auction, movebutler and Marketing Toolkit support content.

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LEARNING LIBRARY

Learning designed to work with your busy schedule!

With our bitesized Learning Library our agents can access content on specific topics with speed. With a whole host of useful '5-minute learning content, it's easy for them to dip in and out and fit into their busy schedule.
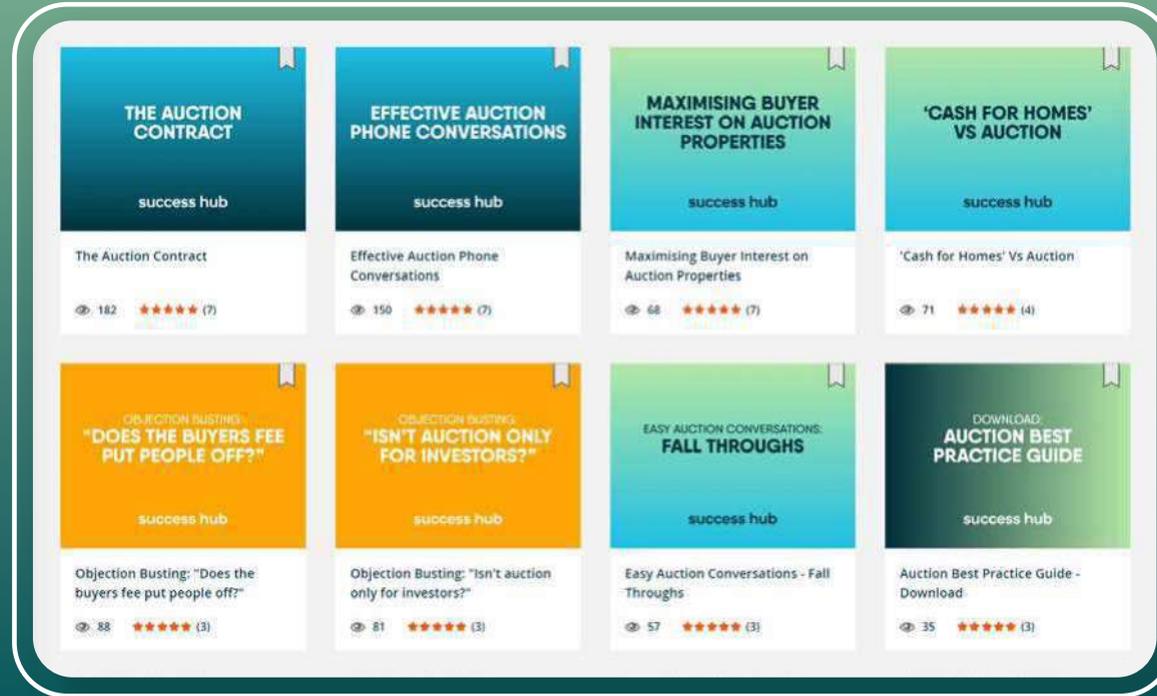
> "
> **"It means that I don't have to block out hours out of my diary for training, I can do it at my own pace and when I have 5/10 minutes here or there is enough to get some learning in."**
>
> **Laura,**
> Sales Negotiator, Nestled Estate Agents

Badges:

With our badge pathways, our can see a clear route to learning proficiency! Inclusive of both interactive online content (reading, videos, quizzes) and offline elements (leads, instructions, sale agreed), our badge pathways clearly show and evidence the progress, knowledge and achievement.

The badge series guides learners through key milestones – from the basics of how auction works to handling buyer objections and supporting the vendor to achieve a positive outcome.

THE AUCTION CONTRACT success hub The Auction Contract 👁 182 ⭐⭐⭐⭐⭐ (7)	EFFECTIVE AUCTION PHONE CONVERSATIONS success hub Effective Auction Phone Conversations 👁 150 ⭐⭐⭐⭐⭐ (7)	MAXIMISING BUYER INTEREST ON AUCTION PROPERTIES success hub Maximising Buyer Interest on Auction Properties 👁 68 ⭐⭐⭐⭐⭐ (7)	'CASH FOR HOMES' VS AUCTION success hub 'Cash for Homes' Vs Auction 👁 71 ⭐⭐⭐⭐⭐ (4)

| OBJECTION BUSTING: "DOES THE BUYERS FEE PUT PEOPLE OFF?"
success hub
Objection Busting: "Does the buyers fee put people off?"
👁 88 ⭐⭐⭐⭐⭐ (3) | OBJECTION BUSTING: "ISN'T AUCTION ONLY FOR INVESTORS?"
success hub
Objection Busting: "Isn't auction only for investors?"
👁 81 ⭐⭐⭐⭐⭐ (3) | EASY AUCTION CONVERSATIONS: FALL THROUGHS
success hub
Easy Auction Conversations - Fall Throughs
👁 57 ⭐⭐⭐⭐⭐ (3) | DOWNLOAD: AUCTION BEST PRACTICE GUIDE
success hub
Auction Best Practice Guide - Download
👁 35 ⭐⭐⭐⭐⭐ (3) |

Bronze Auction Badge

Silver Auction Badge

Gold Auction Badge

WHY IAMPROPERTY

PIONEERS OF THE MODERN METHOD OF AUCTION

15 YEARS IN AUCTION SALES
We are now UK leaders in property technology.

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NPS SCORE

FEES PAID TO PARTNER AGENTS VS PREVIOUS YEARS

Year	Amount
2024	£41,429,266
2023	£33,137,862
2022	£25,064,796

OVER 6,500
Partner Agents in the iamproperty network.

£810,995
Rewards paid to Partner Agents in 2024.

10+ years in prospecting
Supporting Estate Agents to deliver highly targeted marketing campaigns.

1st

UK'S FIRST END-TO-END ONBOARDING PLATFORM

OVER 700 PROPERTY EXPERTS
Working in partnership gives Partner Agents access to our dedicated team.

35 YEARS IN PROPERTY CRM

ECOSYSTEM OF SOLUTIONS
Making agents money, saving time and reducing risk.

- iamproperty Ecosystem
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- Competitor Landscape
- Audience Personas

AWARDS AND ACCREDITATIONS

We're very proud to win and be nominated for various awards over the years – for offering excellent customer support and providing innovative technology to our Partner Agents.

Shortlisted for Property Reporter Awards
Best Auction House 2023

Winner of Property Reporter Awards
Best Auction House 2022

Highly Commended in the Management Today Business Awards
Best Growth Initiative 2023

Winner for Yorkshire and North East
Number 7 UK wide in Deloitte Technology Fast 50, 2022.
Estate Agent endorsements and testimonials

Winner of Northern Tech Awards 2022
Judges Innovation Award

Winner of BVCA Vision 2022
Leading driving growth

Winner of Dynamites 2022
Innovator of the Year

Glassdoor
4.9 out of 5

Trustpilot
iamsold – 4.7 out of 5
Medway – 4.7 out of 5

ESTAS
iamproperty 98.6%

Reviews.io
iamsold 4.7 out of 5

Kerfuffle
iamproperty 5 out of 5

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WHAT OUR AGENTS SAY

> "iamproperty adds a huge amount of value to our business, and not just in terms of profit. The partnership we have with them gives us peace of mind from, robust easy to use systems, to the additional products and services we can offer our clients."

Paul Wood, Director, Pygott and Crone

> "You get great communication and collaboration from day one, with everyone working together as a team to get the client the best result. It gives us the confidence to offer a different sales approach and we know the service levels will be as high as our own."

Stuart Matthew, Managing Director at Miller Metcalfe

> "The Modern Method of Auction perfectly complements our existing marketing solutions, allowing us to cater to every type of client and situation by allowing them to choose which solution best suits their needs."

James Perks, Sales Director at Miles & Barr

ACCELERATING AGENT SUCCESS

We are building partnerships and collaborating with Estate Agents to support them at every stage. Hear from some of our Partner Agents about how working with iamproperty is helping them to succeed.

Stuart Matthew
Managing Director
Miller Metcalfe

Press play to listen to our Partner Agent ...

Watch more agent case studies

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COMPETITORS

COMPETITOR LANDSCAPE
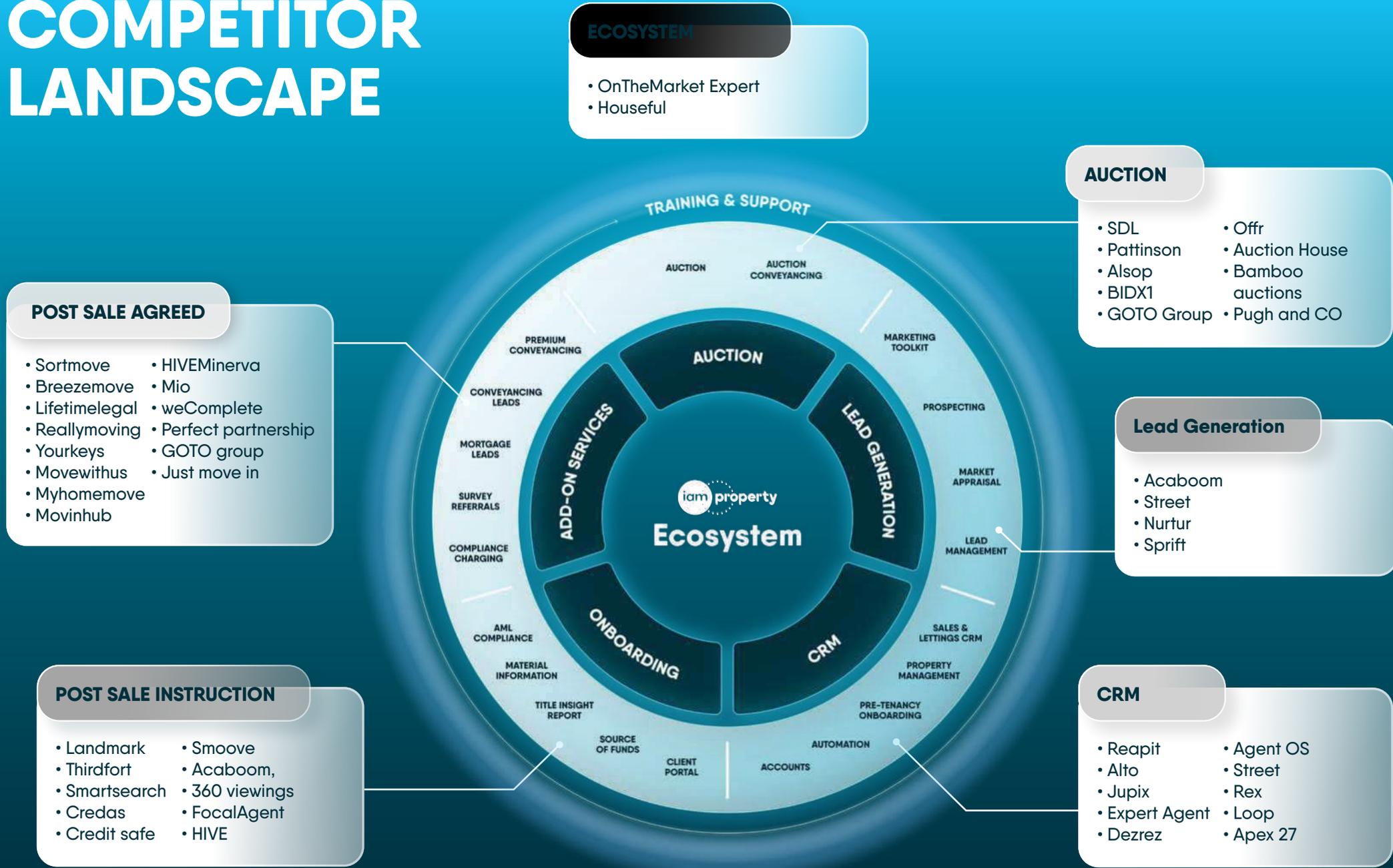
ECOSYSTEM

- OnTheMarket Expert
- Houseful

AUCTION

- SDL
- Pattinson
- Alsop
- BIDX1
- GOTO Group
- Offr
- Auction House
- Bamboo auctions
- Pugh and CO

POST SALE AGREED

- Sortmove
- Breezemove
- Lifetimelegal
- Reallymoving
- Yourkeys
- Movewithus
- Myhomemove
- Movinhub
- HIVEMinerva
- Mio
- weComplete
- Perfect partnership
- GOTO group
- Just move in

Lead Generation

- Acaboom
- Street
- Nurtur
- Sprift

POST SALE INSTRUCTION

- Landmark
- Thirdfort
- Smartsearch
- Credas
- Credit safe
- Smoove
- Acaboom,
- 360 viewings
- FocalAgent
- HIVE

CRM

- Reapit
- Alto
- Jupix
- Expert Agent
- Dezrez
- Agent OS
- Street
- Rex
- Loop
- Apex 27

Central diagram

TRAINING & SUPPORT

AUCTION — AUCTION CONVEYANCING — MARKETING TOOLKIT — PROSPECTING — MARKET APPRAISAL — LEAD MANAGEMENT — SALES & LETTINGS CRM — PROPERTY MANAGEMENT — PRE-TENANCY ONBOARDING — AUTOMATION — ACCOUNTS — CLIENT PORTAL — SOURCE OF FUNDS — TITLE INSIGHT REPORT — MATERIAL INFORMATION — AML COMPLIANCE — COMPLIANCE CHARGING — SURVEY REFERRALS — MORTGAGE LEADS — CONVEYANCING LEADS — PREMIUM CONVEYANCING

iam property Ecosystem

- AUCTION
- LEAD GENERATION
- CRM
- ONBOARDING
- ADD-ON SERVICES

Right sidebar

- iamproperty Ecosystem
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IAMPROPERTY KEY COMPETITORS

KEY
- Comprehensive Offering
- Limited Offering
- 3rd Party Integration

	iamproperty Ecosystem	On the Market Software	Reapit	Alto	Dezrez	Street	Loop
Auction	Comprehensive	3rd Party	3rd Party				
Pre-decision engagement & contracts	Development	3rd Party	3rd Party	Comprehensive	Comprehensive	Comprehensive	Comprehensive
Post Instruction Onboarding & Compliance	Comprehensive	3rd Party	3rd Party	Comprehensive	Limited/3rd Party	3rd Party	Limited/3rd Party
Post Sale Agreed Conveyancing, financial & moving services	Comprehensive	Coming soon	3rd Party	Limited	Comprehensive	Limited	
Pre-tenancy	Comprehensive	Comprehensive	3rd Party			Limited	
Lettings Management	Comprehensive	Comprehensive	Comprehensive	Comprehensive	Comprehensive	Comprehensive	Comprehensive
Property Management	Comprehensive	Comprehensive	Comprehensive	Comprehensive	Comprehensive	Comprehensive	
Accounting	Comprehensive	3rd Party	Comprehensive	Comprehensive	Comprehensive		

OUR AUDIENCE

MARTIN

OUR ESTATE AGENT MD/OWNER

Age : 45+

Experience: Whole career was spent within estate agents, likely owning or growing their business from scratch.

Character: Charismatic, knowledgeable, opinionated, opportunistic, direct.

Who are they: Martin has spent his career deep within the property market, adapting to the changing ways of working and building strong relationships with customers, staff and even competitors. He knows exactly what is going on and has a clear framework for how he wants to run and grow his business.

Martin is likely to have a right-hand person to deal with the day-to-day detail and administrative tasks within the business.

Goals:

+ To generate profit (sell and let houses)
+ Increase value of the business
+ Minimise risk
+ Manage cash flow

Their frustrations:

+ Stock availability, particularly in lettings
+ Increasing competition and unsustainable fee structures
+ The ever-changing landscape and threat of legislation changes

Approach to technology: Martin understands what makes his business special is their unique relationships and ways of working but that tech (especially their CRM) is key to the team's productivity and maximising profit. He isn't looking to change anything, but if a trusted source recommends something interesting, he is open to testing it out.

Communication advice:

Do

+ Value their expertise/knowledge
+ Ask them about their business to show you understand their business/area
+ Bring them genuine new news
+ Reach/inspire him through word of mouth
+ Elevate comms above just product features and be positive, dynamic and purposeful with language

Don't

+ Assume you know more
+ Use generic messaging
+ Over exaggerate successes over your competitors (or suggest they are inferior)

> "I've been in this environment all my career and there is nothing I don't know about running my business."

A day in their life...

Waking up before the alarm, Martin heads to his nearest branch to kick off the day. He gets in early so he can lead a call with the regional branch managers to make sure everyone is on the same page. A power 20 minutes passes with a buzz of numbers and actions before the team arrives all before 9.00am. He sometimes joins their morning meeting to celebrate their successes and provide advice/share his experience around the challenges they are facing. Or by having read "Property Industry Eye' just before, he tries to share the points of interest with the team before jumping in the car, leaving them raring to go.

It's not unusual to have an industry meeting or event to attend and today is no different. It's critical to understand what is happening in the marketplace, especially with such a changeable market environment. But Martin has also built a lot of great relationships over the years with the local competition and industry suppliers and he knows time spent with them will help him thrive.

As he goes to leave, he makes some calls, gets some input and sets up some meetings. He wants to check if the ideas he has had to help drive the business forward are worth his while looking into further. As he's always on the move, he is already on his way to a meeting with one of his most loyal customers who have been with him since the early days. He likes to stay hands-on to protect the business and repay the loyalty his customers have shown him.

After agreeing on key actions, Martin heads back to a different branch on his way home to check in with the team. With no time to waste in his day, he's busy making calls all the way there and then on his way home to make sure everything that can be done, has been done in the day.

iamproperty Ecosystem

+ **Ecosystem Proposition**

+ **Why iamproperty**

+ **Awards & Accreditations**

+ **What our Agents say**

+ **Competitor Landscape**

+ **Audience Personas**

CRM

GAYLE

OUR SALES OR LETTINGS VALUER

Age : 30+

Experience: Likely to have worked in multiple roles within the agency and multiple agencies.

Character: Reliable, sociable, interested, considerate, experienced, savvy.

Who are they: Gayle is an experienced operator. Efficient and effective, she knows her stuff and always makes sure she is fully prepared. She can deal with pressure and loves nothing more than to hit her targets, but she needs them to be reasonable and to be left alone to do what she does best, getting to know her customer.

Goals:

+ To understand her clients well enough to know what they really want and need
+ To hit her instructions target
+ To get good feedback directly from clients
+ For the day to go smoothly!

Their frustrations:

+ Unrealistic competitors that value properties too high and charge too little, making it hard to win instructions first time round
+ Heavy traffic that makes her late for appointments

Approach to technology: Gayle may input into what areas of her role can be helped by technology and takes advantage of solutions that save her time, but she is not the decision maker. She is happy for time-consuming admin tasks to be made more efficient, but technology must not interfere with relationship building.

Communication advice:

Do

+ Find ways to help her build relationships
+ Fit in with her schedule
+ Get her before she heads out for the day (not when she is ready to relax at the end of day)
+ Save her time on admin through smart solutions that integrate with her current processes

Don't

+ Make her life harder
+ Interrupt her day

> "If I can spend quality time with people, I know I will help set the right price for them and I will get them on board."

A day in their life...

Gayle gets into the office around 9.00am to start her day with a strong coffee with the team before heading out on appointments. Her diary has been filled with one-hour slots and she looks forward to her first call. She's already done her research on the street and past prices, so now it's time to meet the client.

She knows that a good valuation is about getting to know the client and really understand what they are looking for. The more realistic she can be, the more chance of selling or letting quickly, but with pressures from local competitors with drop bottom fees and unrealistic valuations, she risks losing the client if her estimate is too low. She also knows an hour will fly by. With photos, descriptions and everything to do by herself, it can be a squeeze, so she is interested in using the latest technology to help her save time.

Always on the run and using the car as her office, getting between appointments can be a pain with traffic and so she quickly rushes to the next and the next, right until home time. Although it's not uncommon to have to squeeze in another valuation after hours, for a busy client.

Aside from the biscuit that her first client gave her, the highlight of her day was winning the instructions, making her hard work worthwhile. As she logs into her CRM to hand over the details to start the marketing, she knows it has been a job well done.

iamproperty Ecosystem

Ecosystem Proposition

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CRM

STEVE

OUR SALES OR LETTINGS NEGOTIATOR

Age : 20+

Experience: Some general experience under their belt but learning a lot on the job.

Character: Passionate, driven, great communicator and relationship builder, friendly, firm, organised.

Who are they: A natural communicator with a strong drive for results, he is great at taking instructions and connecting the dots. He is likely to be motivated by money and gets excited chasing the sale. He feels energised by problem solving to keep things on track. He is quite competitive and would strive to be the best within the agency.

Goals:

+ To secure as many deals as possible
+ To hit targets

Their frustrations:

+ The stress of rude clients and things falling through

Approach to technology: Steve is a critical end user of any tech/CRM system and it is key to his success, but he is not the decision maker. He just wants a system that is intuitive but feature-rich, to allow him to do things exactly the way he wants it to be done. He would likely play a key role in any demo and could be a good advocate or obstacle to a new system.

Communication advice:

Do

+ Make the interaction rewarding (sell/let more houses, earn more money, freebie etc.)
+ Talk to him, not his boss
+ Inspire him with innovative features that would give him a competitive edge
+ Make sure they work for him/with him (not replace him)

Don't

+ Just send him information
+ Assume he will not read let alone act on anything you send

> "My days are so varied but I have a great team around me and a system that works so I just ensure I keep on top of my to-do list!"

A day in their life...

Steve gets to the office around 8.30am and at 9.00am he grabs a coffee for the kick-off meeting in the morning to discuss new property instructions and progress. This signals that the day has begun and the phone starts ringing.

He opens his emails while others buzz around him and whilst checking his to-do list for the day. The system automatically tells him who to chase and connect with, so he starts straight away. Morning is definitely the best time of the day to make calls and actually get hold of people. He learnt early on that keeping in contact with the customers is really the most important part of the job and success really depends on building good relationships fast!

In the next few hours, Steve does everything from informing new applicants of the latest properties to making appointments for them to view these properties. Here he is really 'selling' the viewing, not the property. It sounds obvious, but it is a fact that unless applicants view properties they will not buy or rent them!

In the afternoon, he is often accompanying applicants on viewings, trying to build rapport and trust. If the viewing goes well, and he has been successful in his matching ability, the applicant may want to put an offer in. At this point, he will need to use his negotiation skills to get an agreement. Once an offer from an applicant has been agreed, he sees the transaction through to an exchange of contracts or move in date. This means liaising with solicitors, surveyors, financial advisors, landlords or guarantors. There is always someone to connect with and his day always ends with a new to-do list ready for the morning.

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CRM

RACHEL
OUR SOLICITOR

Age : 28+

Experience: Been in the industry for years.

Character: Less formal and more personable. Used to doing things a certain way so can be reluctant or too busy to consider change due to risk aversion

Who are they: Part of a well-established firm and team, Rachel is organised, detail orientated and a great communicator. She knows her stuff and is process driven to get through completion targets. She can work under pressure and is adaptable, working with different systems whilst juggling emails and phone calls from Agents and customers to make sure things go as smoothly as possible.

Goals:

+ Get through completions to drive a steady income stream
+ Provide a good service for her clients

Their frustrations:

+ Typically using multiple data/ programme/software –lots of manual and duplicated tasks.
+ Bombarded with communications on all fronts –email, phone and post
+ Understaffed so things are rushed with large workloads

Communication advice:

Do

+ Show respect for their specialism/ expertise
+ Establish trust
+ Follow up and deliver on promises
+ Stick to the facts

Don't

+ Bombard them
+ Overpromise

> "I want to get the best result for my client but have a lot of cases on the go at once."

A day in their life...

Rachel gets to the office around 8.00am and logs straight into all the systems she uses. She checks her emails to make sure nothing urgent has cropped up since the previous day and starts working through her cases.

The team often have meetings to ensure everything is going smoothly and no one needs additional support if something is less straightforward than usual, she sometimes has to support other cases where her particular experience is helpful.

Chasing documents, information and searches take up a large amount of her day, methodically checking off key tasks as she goes, and making sure she knows exactly what is needed. She spends time working on clients' contracts ready for exchange and enjoys being able to help her clients with advice when there are issues. It's a lot of paperwork but she has a great team around to support her.

Incoming calls can be an unwelcome distraction, especially if she's concentrating on important contract tasks but Agents, clients and 3rd party solicitors often want updates and information too.

She uses the latter part of the day to review her upcoming pipeline of cases, to make sure there is enough team resource to take them on. If things are held up, it can have a knock-on effect so she pushes her team to get things over the line. It's sometimes a bit stressful, especially if something has been missed and she often works a bit later to get things done.

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- + Ecosystem Proposition
- + Why iamproperty
- + Awards & Accreditations
- + What our Agents say
- + Competitor Landscape
- + Audience Personas

ELLIE
OUR LETTINGS MANAGER

"My job is my passion and I have worked hard to build up my portfolio."

Age : 30+

Experience: Whole career was spent within estate agents, likely having started out as a Lettings negotiator.

Character: Organised, charismatic, knowledgeable, opinionated, opportunistic, direct.

Who are they: Ellie has worked her way up from being a lettings negotiator and retains her competitive spirit. She is very protective of her clients (and her income), so any changes in the market and the tools she uses could be disruptive. Ellie is Martin's right-hand person in the business and keeps up to date with lettings legislation.

Goals:

+   To generate revenue (let houses)
+   To build great relationships/deliver exceptional customer service
+   To reduce the impact of uncertainty/change
+   To hit her targets

Their Frustrations:

+   Stock availability
+   Increasing competition and unsustainable fee structures
+   The ever-changing landscape and threat of legislation changes

Approach to technology: Ellie understands what makes their business special is their unique relationships and ways of working but that tech (especially their CRM) is key to the team's productivity and maximising profit. She isn't looking to change anything, but the MD may instigate change for the benefit of the overall business.

Communication advice:

Do

+   Value their expertise/knowledge
+   Ask them about their business to show you understand their business/area
+   Bring them genuine new news
+   Elevate comms above just product features and be positive, dynamic and purposeful with language

Don't

+   Assume you know more
+   Use generic messaging
+   Over exaggerate successes over your competitors (or suggest they are inferior)

A day in their life...

Waking up before the alarm, Ellie checks her emails for any overnight emergencies and then jumps in the shower to start thinking about a plan for the day. She grabs a coffee and some breakfast and heads to the office.

Ellie starts the day with a morning meeting, reviewing yesterday's tasks and tasks for the day, ensuring that there is office cover for viewings and valuations and that time is set aside for moving in paperwork.

No two days are the same, and today's task list consists of, prospecting, valuation, a property inspection and reviewing outstanding maintenance with her property manager.

Her perfectly planned day will inevitably be interrupted by Martin coming into the office to discuss a new idea for improving the working practices or a contractor wanting to put the world to rights for 20 mins! That's not to mention the lost keys!

Ellie's days are always busy and always different, but she stays on top of things with carefully planned lists and lots of post-it notes and is never more pleased than when a new let is secured by one of her team.

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KYLIE
OUR PROPERTY MANAGER

Age : 30+

Experience: Will probably come from outside of the industry, either admin or customer service role.

Character: A problem solver by nature and not easily rattled. She is very organised and firm.

Who are they: Kylie likes the certainty of set hours and a set wage, but enjoys the busy role of communicating with landlords, tenants and contractors. Kylie likes to get out and about to conduct property inspections but struggles to find the time to always write them up.

Goals:

+ Keep on top of mandatory property checks, e.g. gas safety certificates
+ Turn maintenance jobs round quickly once reported by tenants

Their frustrations:

+ Lost keys
+ Access issues
+ Angry landlords and tenants due to lack of communication

Approach to technology: They will have little say in what technology the are given to use. They will see the benefit of the technology if they are given the training and time to integrate it in their day-to-day.

Communication advice:

Do

+ Offer time-saving solutions
+ Work out what their specific role involves to make sure you have the right information for them

Don't

+ Take up too much of their time with irrelevant information
+ Don't assume that they will use the same processes as the rest of the business

> "
> "I am always happy to help but I am not a magician."

A day in their life...

Kylie has just dropped the kids off at school and has got to the office at 9.00am to start looking at her emails. She knows she has two property inspections booked in for this afternoon and needs to check which gas safety certificates need to be renewed for the rest of the month.

Most of her morning is taken up by calls from tenants reporting new maintenance works or chasing up existing jobs. She is really pleased to receive a thank you email from a tenant she helped last week who got locked out of their home, it made it worth while coming back to the office at 9.00pm once the kids were in bed to get the master key.

Kylie relies on her CRM to organise the rest of her day, with several to-do items due soon, and multiple outstanding maintenance works to be chased. She was also pleased to be able to spend half an hour processing the invoices for jobs completed last week – contractors are always happier once they have been paid for a job well done.

It's 5.00pm and Kylie is just about to leave the office when one of her favorite landlords calls and confirms she can go ahead with the repainting of a tenants flat, the tenant will be pleased (when she tells them tomorrow!).

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- + **What our Agents say**
- + **Competitor Landscape**
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MALCOLM
CLIENT ACCOUNTS

Age : 30+

Experience: Malcolm will have had previous experience in an accounting environment, however, will not have any specific accountancy qualifications.

Character: Happy to work alone, good attention to detail, sometimes to the point of pedantic.

Who are they: Malcolm likes structure and ensuring that everything has its place. He finds reassuring that he is required to have written instructions for what he needs to do. He takes his job seriously and surprises people as to how much fun he is on a night out.

Goals:

+ Everything gets allocated
+ Deadlines are not missed

Their frustrations:

+ Poor information from branch colleagues
+ Unhappy landlords
+ Slow systems

Approach to technology: They are reluctant to a change in software as it could slow them down while they learn new routines.

Changing software makes them fearful that they may not be as accurate in the short term or that payments may be delayed, which may upset the landlords.

Communication advice:

Do

+ Listen to their concerns
+ Have specific written information for them, and good process documentation.

Don't

+ Be too 'salesy', you don't need to 'close' them
+ Give them information not relevant to accounts

> " My job is important because I deal with peoples money...it is important for me to get it 100% right."

A day in their life...

Malcolm's run before work really helps him clear his mind to focus on what he will have to do today. His day starts with a review of emails and answering client queries. He knows he will have to start processing quickly though as there is a lot to get through.

With the bank receipts entered into the system, he can start to allocate the correct funds to the landlords and tenants. He has a lot of new tenants moving in and he knows he has to act promptly to register their deposits.

He has just heard back from one of the property management contractors who he's been chasing to send in their invoices which need to be paid, which is great as it will get them cleared, but means it will be a busy afternoon.

Malcolm was just getting in a rhythm when a tenant he chased yesterday calls to say that they won't be able to pay their rent arrears today after all, he wonders if he can get the lettings manager to break the bad news to the landlord!

As Malcolm's day draws to a close he is pleased to be able to press the button to initiate the landlords payments and send off their statements.... Although he knows it will generate more email queries coming through in the morning.

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MARKETING TOOLKIT

STAND OUT WITH OUR MARKETING TOOLKIT

One solution. Everything you need to stand out! From expert data and impactful campaigns to Market Appraisals that impress – standing out in your market has never been easier.

ONE SOLUTION

EVERYTHING YOU NEED TO STAND OUT!

From expert data and impactful campaigns to market appraisals that impress – standing out in your market has never been easier. With one solution you can win more instructions, maximise results and dominate your market.

▶ Watch video

EXPERT DATA AT YOUR FINGERTIPS

Standout results start with superior data!

Access millions of properties with hundreds of data points, giving you the expert data, material information and market insights you need to deliver hyper-targeted campaigns that impress potential clients and keep you ahead of the competition.

It's all at your fingertips! With our data-rich, flexible toolkit, unlock the power of data and win more instructions.

MARKET APPRAISALS THAT IMPRESS!

Stand out from the start with our Market Appraisal module.

Covering the entire journey—from pre-appointment communications and slick in-room presentation tools to post-appointment follow-ups—you'll have everything you need to stand out in the front room and maximise your win rate.

CUTTING EDGE CAMPAIGNS – MARKET BEATING ROI

Pack a punch with targeted on and off-market data, a huge range of ready-to-go customisable direct mail templates, bespoke branded assets and the finest quality print.

Create unforgettable campaigns with market beating ROI - in just a few clicks.

POWERFUL AUTOMATIONS TO ACCELERATE RESULTS

Work smarter, not harder! With powerful automations that reduce effort and enhance results.

Connect with prospects at the perfect time and wow clients with communications at key moments - all without lifting a finger.

Never miss an opportunity with always-on marketing delivering a steady stream of instructions - effortlessly.

REASONS TO BELIEVE

10+ YEARS PROSPECTING
Supporting Estate Agents to generate new instructions.

ROI £62:£1
Get an average of £62 for every £1 spent.*

900K ON MARKET PROPERTIES
Tracked daily.

28M+ UK RESIDENTIAL PROPERTY DATABASE
Monitored daily to reach prospects with ease.

154K MARKETING CAMPAIGNS
Sent in 2024.

220+ MARKETING TEMPLATES
Customised with our agents branding.

10x DATA PROVIDERS
Providing the latest property insight to our Partner Agents.

3-5 DAYS
Expert print and fulfilment on all marketing letters and mailers.

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- Features
- Pricing
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- FAQs
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Historic England · Valuation Office Agency · Ofcom · Ordnance Survey · Office for National Statistics · Environment Agency · Google Maps · HM Land Registry · ValPal Network · dataloft · rightmove · zoopla · OnTheMarket

*Based on the average return per campaign from active agents.

IAMPROPERTY MARKETING TOOLKIT
AT A GLANCE

ON-MARKET PROSPECTING

Unlock smarter prospecting with tailored insights, advanced targeting, and timely campaigns—designed to help our agents win instructions and grow their market share.

SALES   **LETTINGS**   **LANDLORDS**

OFF-MARKET PROSPECTING

Turn off-market properties into sales. With our extensive UK database and pre-defined Smart Filters, our agents will stay ahead of the competition.

SALES   **LETTINGS**   **LANDLORDS**

CAMPAIGN AUTOMATION

Powerful automations that accelerate results for our agents.

Our agents can connect with prospects at the perfect time, and wow their clients with relevant communications at key moments with triggers - all without lifting a finger.

SALES   **LETTINGS**

SMART FILTERS   `NEW`

Smart Filters help agents streamline campaign creation.

Target the right areas and prospects with Smart Filters, agents can customised searches to suit their unique requirements.

SALES   **LETTINGS**

MARKET APPRAISAL

From pre-appointment comms to slick in-room presentations and automated follow-ups, our agents can impress potential clients from the start and maximise their win rate.

SALES

PROPERTY INSIGHTS

Give buyers and sellers the insights they seek with instant Property Reports & Comparisons (New). Packed with property details and local market knowledge, our agents engage prospects and drive more instructions.

SALES

REPORTING

Make smarter, faster decisions with comprehensive data that tracks competitors (New), prospecting performance and ROI.

DIRECT MAIL & OFFICE DELIVERY PRODUCTS

Our all-in-one Marketing Library saves both time and money, for our agents. 200+ editable templates, from postcards and flyers to property reports and window cards — all aligned with our agents brand.

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ON-MARKET PROSPECTING

Unlock smarter prospecting with tailored insights, advanced targeting, and timely campaigns—designed to help agents win instructions and grow their market share.

Standout results start with superior data! Agents gain access to millions of properties with hundreds of data points, giving them the expert insight, material information and market intelligence. Creating hyper-targeted campaigns agents can impress prospects and stay ahead of the competition.

Over 900k on-market properties, updated daily!

We track properties daily, from the moment they appear on portals until the minute they're sold, rented, or withdrawn. With our advanced Smart Filters, Trigger campaigns and automation tools, agents turn data into action by engaging with the right properties at the right time to maximise their marketing impact.

Key opportunities include:

+ Cancelled sale where by the sale has fallen through

+ Withdrawn properties

+ Recent property reduction

+ Extended time on market

Our Marketing Toolkit even identifies landlords' residential addresses for tenant-let properties, ensuring campaigns reaches the right person every time.
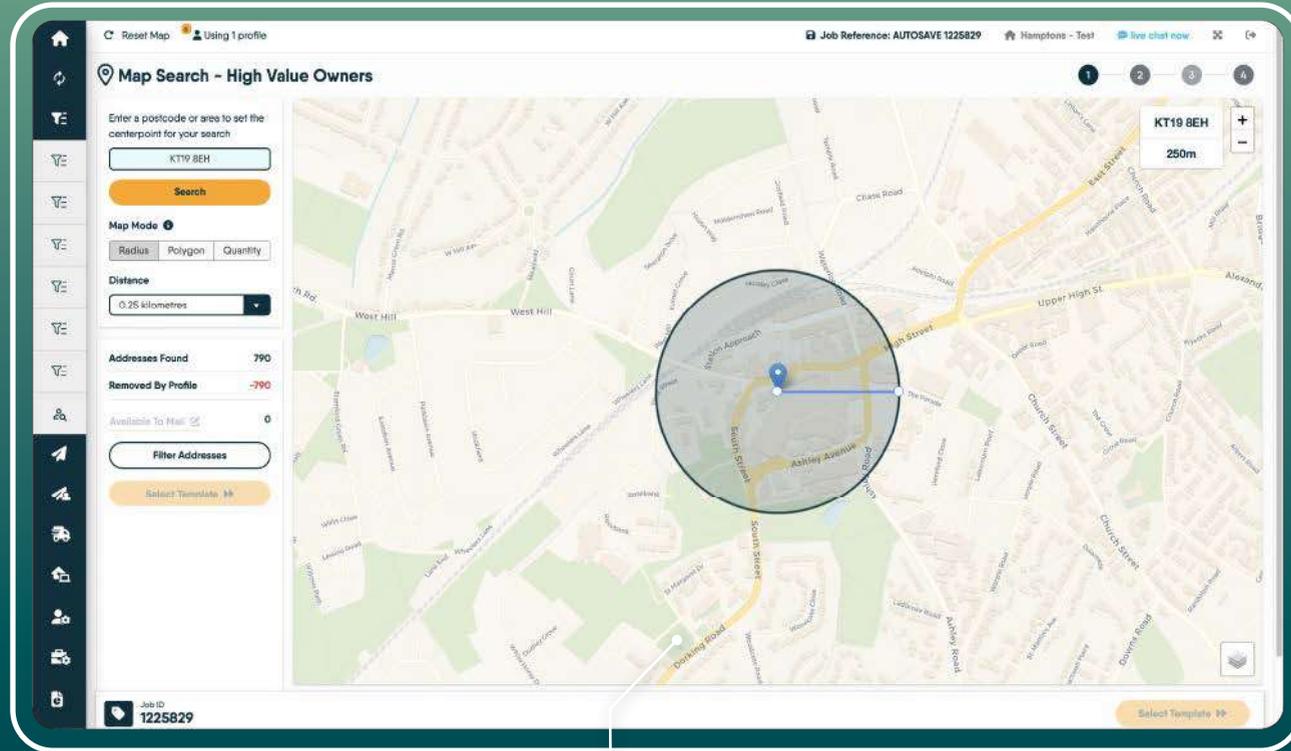
900,000 On-market Properties listed for sale across the UK.

Marketing Toolkit

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+ Proposition

+ Features

+ Pricing

+ Competitor Landscape

+ FAQs

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TRIGGERED CAMPAIGNS

Our expertly designed triggered campaigns make sure our agents get the most out of their marketing investment.

We monitor properties daily – from the first time a property appears on the portals until it is sold, rented, or withdrawn. This enables agents to connect with prospects at the right time with a timely impactful message that resonates with the vendor or landlords personal circumstances.

Our proven Triggers campaigns are designed to maximise marketing effectiveness. For example, the 12 or 16 weeks on-market triggers, identify on-market home movers that might be outside their sole agency agreement and considering alternative sale methods, such as Auction.

Keep track on their local market

Movers' information is tracked daily, providing agents with key data, including addresses, price, current agent, property type and size, and time on market. This valuable insight enhances their local market knowledge and helps to identify properties that may be ideal for Auction.

Use key triggers, such as, 12 or 16 weeks on market or cancelled sales, alongside our Auction mailer templates to maximise Auction referrals.
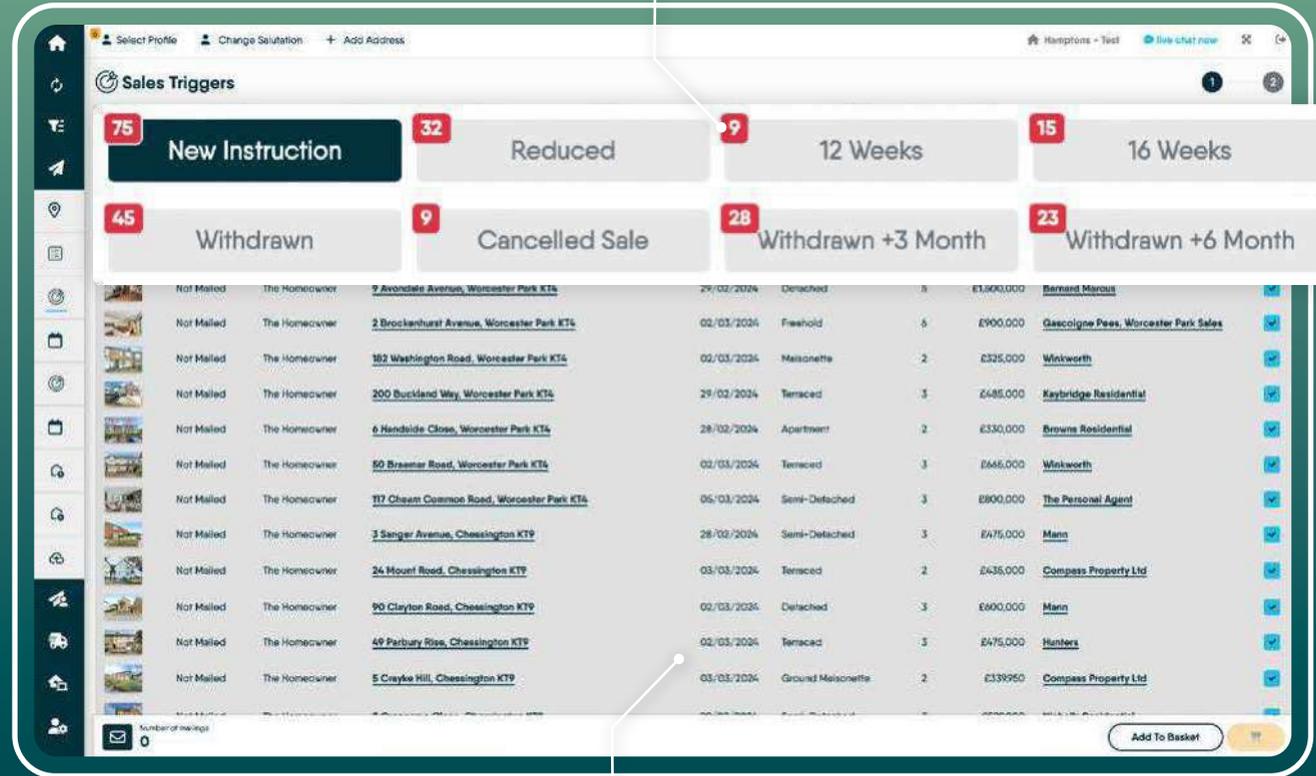
Personalised client experiences to help our agents stand out.

Marketing Toolkit

iamproperty

Proposition

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CAMPAIGN AUTOMATION

Agents connect with prospects at the perfect time, and wow clients with relevant communications at key moments - all without lifting a finger.

Our agents work smarter, not harder with our powerful automation tools that reduce admin tasks while maximising results.

Once agents set up their Trigger Campaigns, they can effortlessly automate personalised communications. With advanced targeting tools, real-time alerts, budget controls and dashboards, agents can efficiently track and manage their campaigns, ensuring they never miss an opportunity.

How it works:

1. Choose a day and frequently; daily, weekly on monthly.
2. Select a campaign: 20:20s, on-market triggers,or anniversaries.
3. Pick a template, letter, postcard or mailer.
4. Sit back and leave the rest to us.

Our agents will never miss an opportunity.

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SMART FILTERS

Effortlessly streamline prospecting with Smart Filters.

Whether agents are targeting a particular area or filtering out unsuitable properties – refining their approach is simple.

Agents can effortlessly create and save Smart Filters based on their most frequently used segments. Prospects can be targeted using our standard Smart Filters or customise filters based on frequent searches.

Our intelligent, data-rich tools are tailored to their local market, including council tax bands and property values.

NEW

Smart Filters + Automation.

Use Smart Filters with campaign Automations gives our agents full control; ensuring they connect with the right prospects at the right time- every time – with less admin!
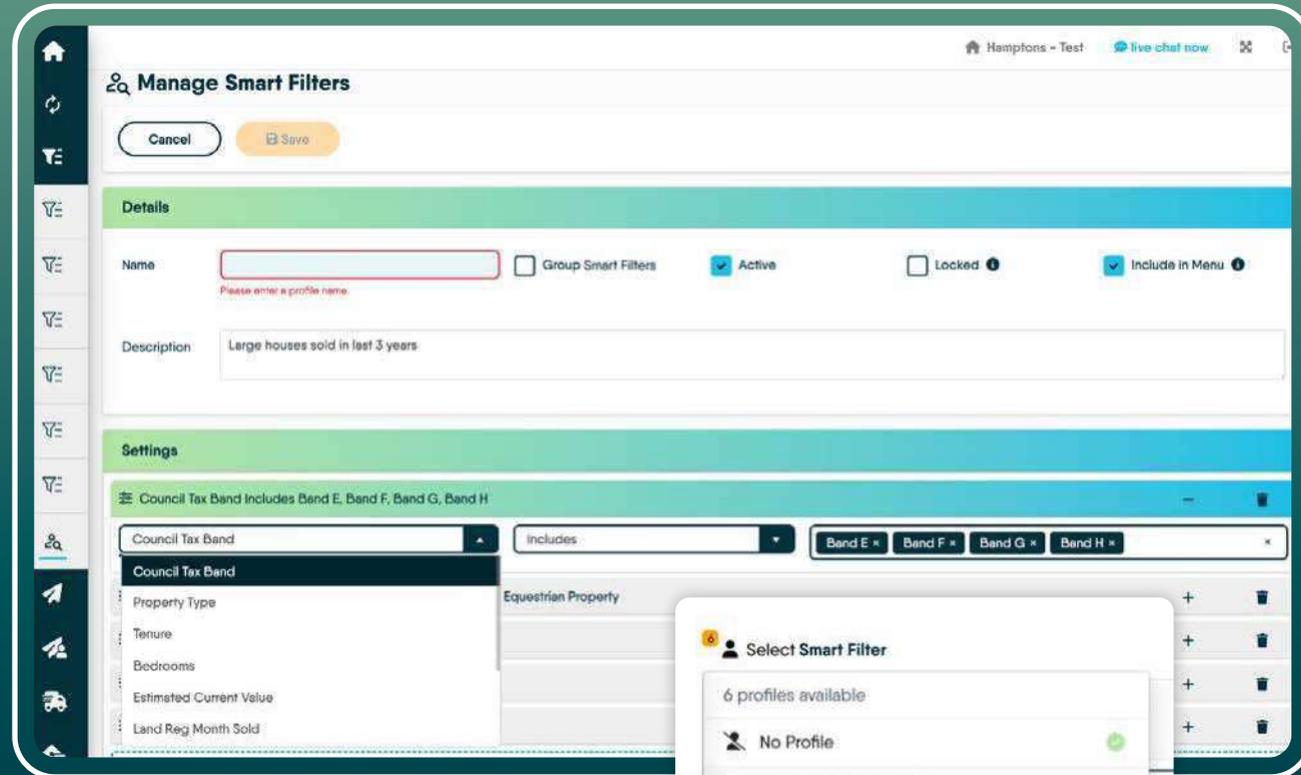
OFF-MARKET PROSPECTING

Turn off-market properties into sales.

Pack a punch and prospect at scale. With real-time insight, our agents can connect with the right audience and target the right properties, keeping their stock levels just right.

Using Smart Filters, agents can deliver highly targeted relevant messages using segmentation, geo-targeting, and retargeting their prospects – boosting their ROI.

Starting with a postcode based filter, agents can refine their selection criteria using property specific attributes. For example, they can target prospects based on sale dates to identify likely movers or highlight potential increases in property value. Then, with our marketing template library, agents can launch cutting edge campaigns effortlessly.

With access to our extensive off-market property database, our agents can dominate their local market, secure new instructions and stay ahead of the competition.

Off-market campaigns types:

+ Sold in your area

+ Just listed

+ Anniversaries

+ Likely movers   COMING SOON

Using Smart Filters, agents can deliver highly targeted campaigns.

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MARKETING TOOLKIT CAMPAIGNS

RECENT SALES OR LETTINGS

Agents can capitalise on their recent success and uncover new opportunities. Use our powerful targeting tools to connect with prospects and inspire them to list or switch.

SALES **LETTINGS** **OFF-MARKET**

JUST LISTED

Agents can showcase their success, boost local awareness and stay top of mind with potential sellers.

Once a property is listed on the portals, its details are pulled into a ready to launch campaign. Nearby homeowners know the agent is actively selling in their area — reinforcing their position as the agent of choice.

LANDLORDS **OFF-MARKET**

ANNIVERSARIES
(Triggered Campaign)

Our personalised Anniversary mailings help our agents stay connected with past clients, keeping their brand top-of-mind for their next move.

SALES **LETTINGS** **OFF-MARKET**

WITHDRAWN PROPERTIES
(Triggered Campaign)

Homeowners who withdraw their property often relist within a year or two. With our withdrawn property trigger agents can stay connected, so they're top of the list when they decide to come back to market.

SALES **ON-MARKET** **OFF-MARKET**

LIKELY MOVERS
(Search Profile)

Be the first choice when they're ready to move. Agents can effortlessly identify homeowners likely to move in the next year, ensuring their brand and services are top-of-mind when they're ready to sell.

SALES **OFF-MARKET**

CANCELLED SALES
(Triggered Campaign)

Agents can act fast when a prospect's sale falls through - by offering enhanced services or alternative sales methods to relaunch their sale with speed and confidence.

SALES **ON-MARKET**

TIME ON THE MARKET & REDUCED
(Triggered Campaign)

If a property's been on the market a while, or just been reduced, it could be the perfect time for a campaign sharing recent success stories and introducing alternative methods of sale designed to get their move back on track.

SALES **LETTINGS** **ON-MARKET**

CUSTOM TRIGGER MAILINGS

With custom triggers agents can create tailored mailer campaigns that resonate with local prospects, ensuring every mailer hits the mark.

**SALES** **LETTINGS** **OFF-MARKET** **ON-MARKET**

TEMPLATE LIBRARY

Create high-impact marketing materials in minutes — fully branded, expertly designed, and ready to send.

Design and send personalised mailers effortlessly with our all-in-one Marketing Library. Our go-to resources save both time and money, for our agents no matter what their in-house marketing capabilities are. With over 200+ editable templates, from postcards and flyers to property reports and window cards. Our agents can quickly and easily edit messaging to suit their campaign objectives and branding.

Always fresh, always on brand.

We continuously update templates with new artwork and messaging, so campaigns stay relevant and deliver results. For something more bespoke, our design team is on hand to help our agents— with a 5-day turnaround as standard.
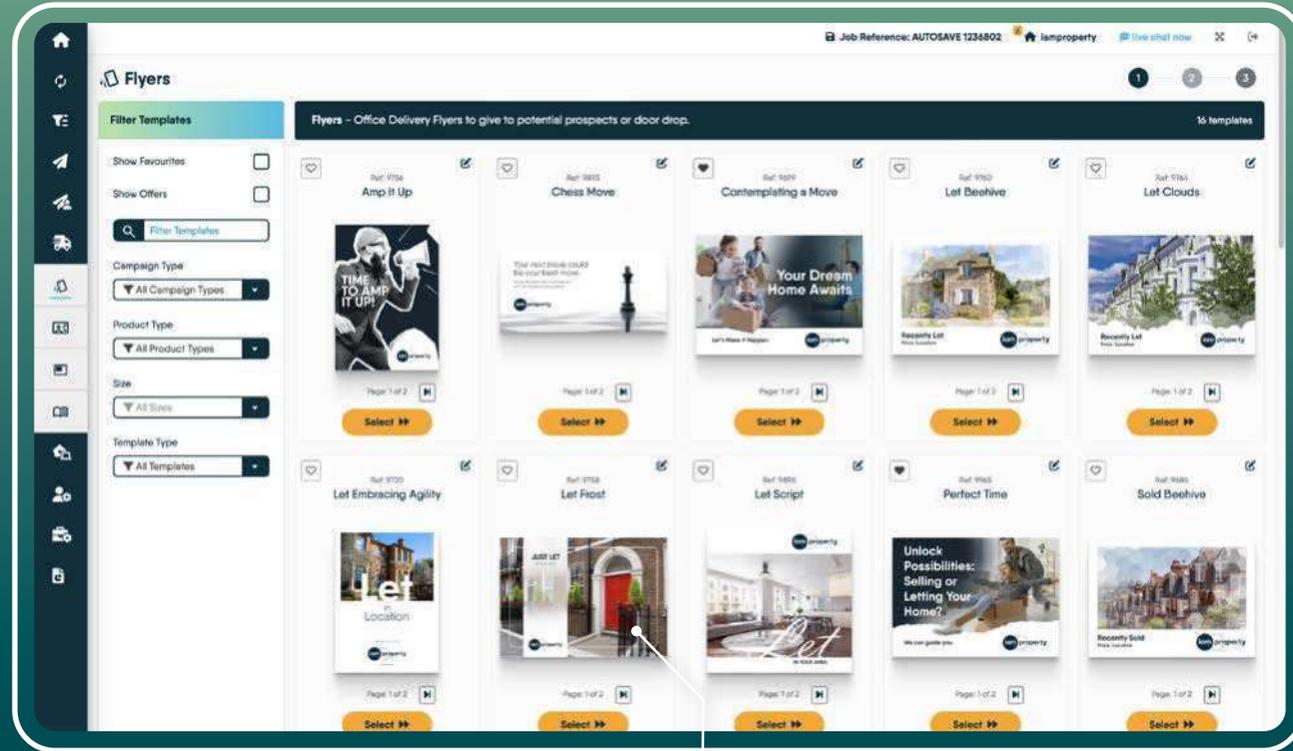
For bespoke campaigns, our design team is on hand to help.

Marketing Toolkit

+ iamproperty

+ Proposition

+ Features

+ Pricing

+ Competitor Landscape

+ FAQs

+ Book a Demo

+ Ecosystem Solutions

MARKET APPRAISAL

NEW

Stand out from the start! Impress potential clients and maximise your win rate with our Market Appraisal.

From pre-appointment communications to in-room presentations and post-appointment follow-ups, our Market Appraisal gives agents everything they need to impress clients and maximise their win rate.

Set up is quick and easy. Agents can choose from a range of ready-to-go templates or create unlimited new ones, all their own brand. Add a video introduction, , share a bit about your team and deliver a standout branded experience at every touchpoint.

With insight-driven personalisation at every stage - from pre-appointment invitations to tailored appraisals - agents can provide expert advice based the sellers circumstances.

Stay front-of-mind post Market Appraisal with automated, personalised follow-ups. Smart technology helps agents monitor engagement, respond fast, and turn opportunities into instructions.

With CRM integrations that auto populates content and automated journeys as standard.
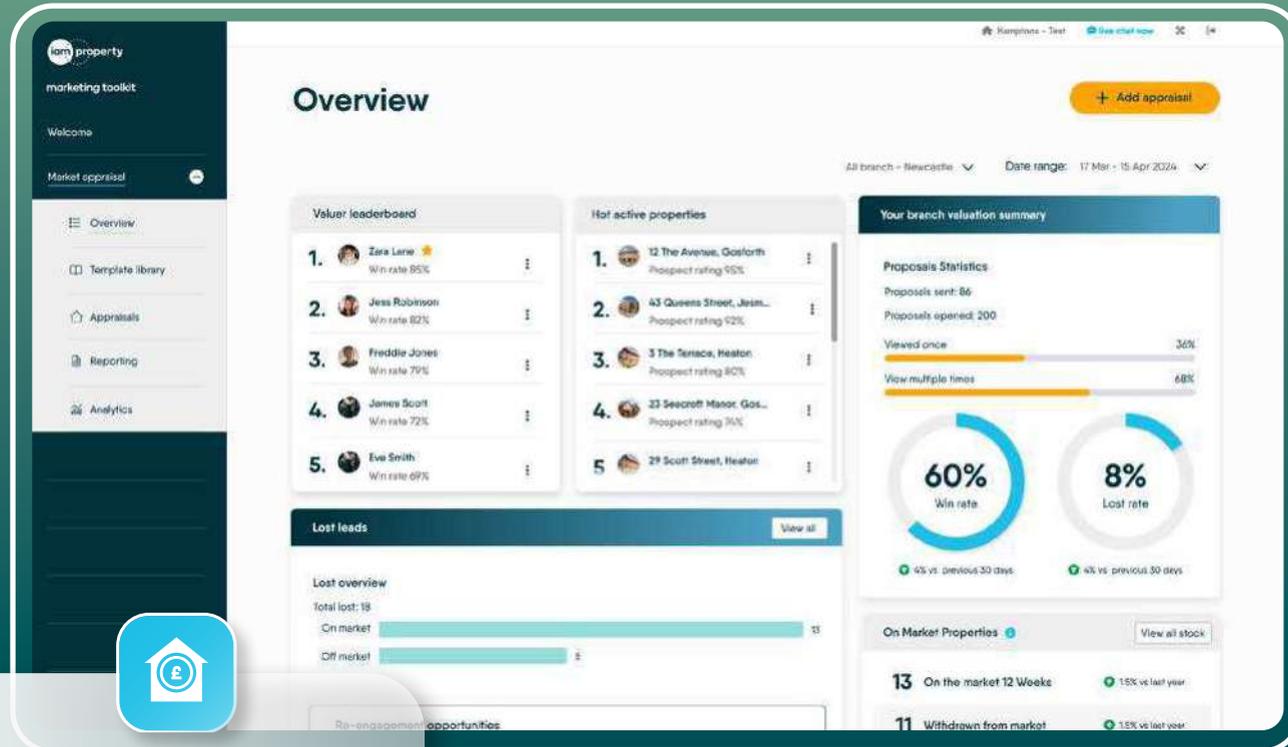
DRIVE AUCTION OPPORTUNITIES

With insight driven recommendations in the front room, agents can position Auction, if the seller is after a quicker, more secure sale.

- Marketing Toolkit
- + iamproperty
- + Proposition
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MARKET APPRAISAL KEY FEATURES

NEW

Stand out from the start! Our agents can impress potential clients and maximise their win rate with our Market Appraisal module.

▶ Watch video

PRE-APPRAISAL PRESENTATION

Create eye-catching multimedia presentations with ease; introduce their valuer, highlight your services, and use built-in insight tools to personalise at every stage.

CLIENT CIRCUMSTANCE CHECKER

Get to know your clients before you meet them. Our editable survey gives you the insights you need to deliver bespoke recommendations and tailored advice.

UNLIMITED TEMPLATES

You're in charge! Create as many templates as you need—for every brand, client type, or property style. The options are unlimited. Tailored appraisal presentations & proposals showcase your local expertise with confidence. Build presentations packed with property data, market trends, and local insights.

TWO-WAY CRM INTEGRATION WITH IAMPROPERTY CRM

Book a sales appointment, and data is automatically shared with the Marketing Toolkit. Templates auto-populate and updates sync seamlessly back keeping everything in harmony.

NURTURED JOURNEYS

Stay top of mind by sharing property updates and market news. You choose the template and how often to send. It's that easy to stay in touch.

LOST LEAD TRACKING

Never miss an opportunity to re-connect. Intelligent tracking tells you when someone reengages with your presentation — so you can follow up at just the right time.

SMART REPORTING

Track every interaction, from pre- to post-appraisal. Easily identify opportunities, send responsive communications and optimise your appraisal process.

ONE-WAY INTEGRATION WITH REAPIT

Eliminate double entry! Reapit sends data to the Marketing Toolkit for a smooth and simple process.

MARKET APPRAISAL IAMPROPETY CRM INTEGRATION

NEW

Fully integrated with our CRM, it eliminates admin and simplifies data entry—from valuation bookings right through to post-appraisal follow-ups.

STREAMLINED DATA ENTRY

Book appointments as usual in your CRM and they'll instantly sync with the Market Appraisal module. Appointment, client and valuer details are automatically added — so you're ready to go, faster.

AUTOMATIC PRE-APPRAISAL INVITATION SENDING

Choose to send your pre-appointment presentation automatically—complete with your branding, branch and contact details. Your valuer details are matched so any valuer specific content will be dynamically updated too.

Or you can choose to review and tweak each invite before it goes out.

VALUER DATA SYNC IN PRE-PROPOSAL & PROPOSAL DOCUMENTS

Valuer details are automatically pulled into your proposal presentation, creating dynamic, valuer-specific content to speed up proposal creation.

DATA AND TIME SYNC

If an appointment date or time changes, the update is reflected in both systems — no double entry needed. And the pre-appraisal invitation is resent – so your prospect has the latest appointment details.

JOURNAL ENTRIES

Appraisals, proposal sends and status updates are logged automatically in your CRMs journal, including key activity notes and a link to the proposal.

TASKS CREATED

Tasks are triggered automatically in your CRM, helping you move things forward and follow up at the right time.

ONE-WAY INTEGRATION WITH REAPIT

Eliminate double entry! Reapit sends data to the Marketing Toolkit for a smooth and simple process.

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PROPERTY REPORTS

Showcase local expertise with confidence. Agents can build reports packed with property data, market trends, and local insights.

Agents can showcase their local expertise by providing key property and neighbourhood data—including EPC ratings, recent sales, local schools, healthcare providers, and transport links. At the click of a button, Property Reports can be downloaded instantly or printed to suit the agents needs.
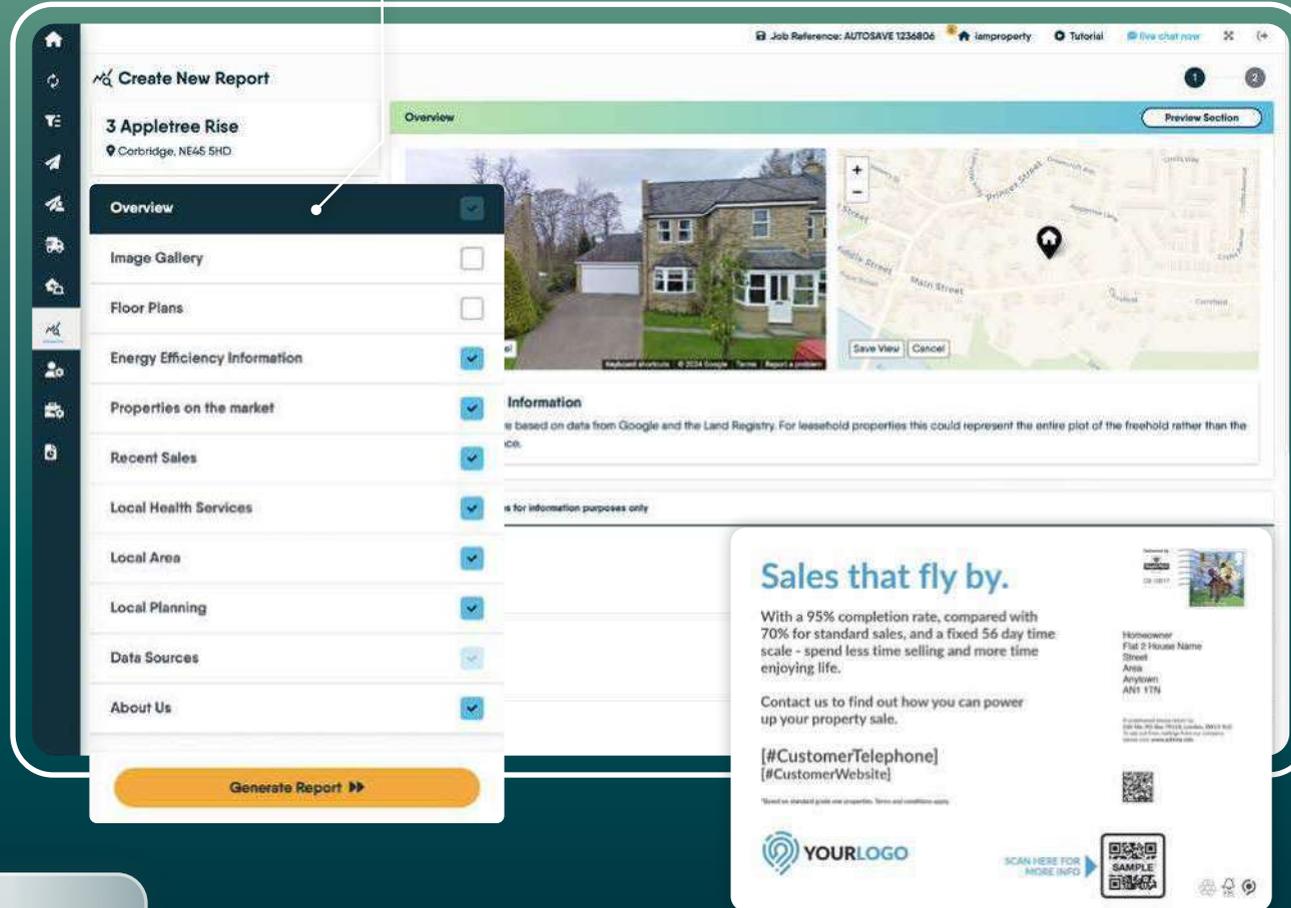
Track every lead.

Agents can drive more instructions with unique reports for each prospect. Adding QR codes to marketing campaigns lets our agents track valuation requests online.

Our powerful Property Reports, give agents instant access to real-time market insight on over 28 million UK residential properties.

Over 70% of your clients upfront material information covered.

Agents can drive more instructions with QR code lead capture.

Create New Report

3 Appletree Rise
Corbridge, NE45 5HD

Overview

Image Gallery

Floor Plans

Energy Efficiency Information ✓

Properties on the market ✓

Recent Sales ✓

Local Health Services ✓

Local Area ✓

Local Planning ✓

Data Sources ✓

About Us ✓

Generate Report ▶▶

Sales that fly by.

With a 95% completion rate, compared with 70% for standard sales, and a fixed 56 day time scale - spend less time selling and more time enjoying life.

Contact us to find out how you can power up your property sale.

[#CustomerTelephone]
[#CustomerWebsite]

YOURLOGO

SCAN HERE FOR MORE INFO

Marketing Toolkit

+ iamproperty

+ Proposition

+ Features

+ Pricing

+ Competitor Landscape

+ FAQs

+ Book a Demo

+ Ecosystem Solutions

PROPERTY COMPARISONS

NEW

Back every valuation with data-led insight and turn local knowledge into instruction-winning conversations.

Analyse properties with confidence by comparing all relevant data points including. listings, recent sales, and local market trends.

Instant side by side comparisons.
Select nearby on and off market properties to compare price, tenure, history and more.

Local area insights.
Factor in local schools, transport, and broadband speeds to give buyers and sellers a complete view of the area.

Tailored insights for every client.
Download professional reports to show exactly where a property sits in the market — building trust and helping secure new instructions.

Data backed recommendations.
Support seller conversations with data-backed recommendations — justify valuations, highlight market position, and showcase your local expertise.
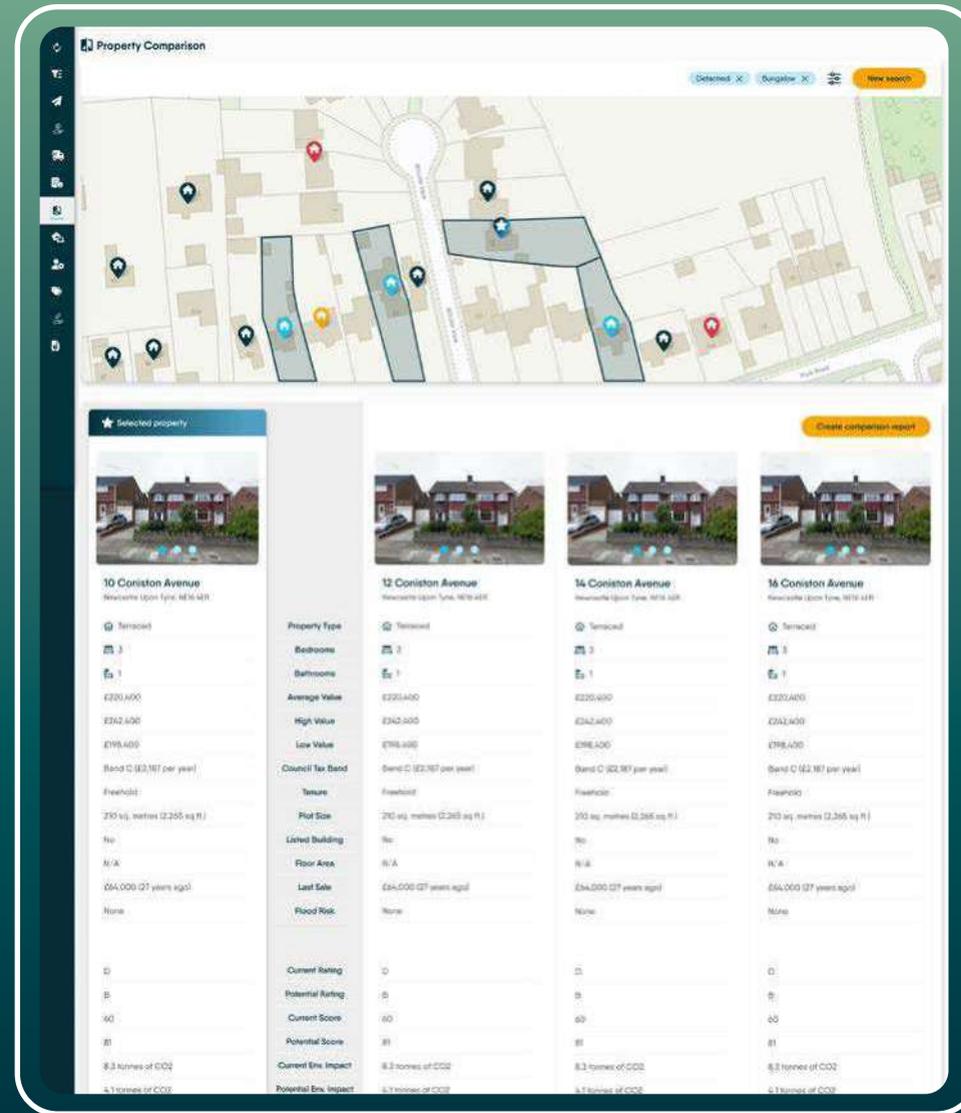
COMPETITOR ANALYSIS

NEW

Stay ahead of the competition.

Agents can compare their branch to other local agents. Using powerful insight tools agents can see who's listing more properties, selling faster or dropping prices. Using this expert data agents can adjust their strategy, stand out locally and stay one step ahead.

Stay ahead of the competition.
Agents can compare their branch with up to 10 local agents – track listings and see where they rank.

Track market share.
Compare current performance with last year's figures to see whether agents are gaining ground or need to act.

Monitor pricing performance.
See who's achieving their asking price and spot where others are falling short.

Speed of sale matters.
Track how fast properties are selling, as its a clear edge for potential vendors if its your agency.

Spot the warning signs.
Agents can monitor cancelled sales, price drops and withdrawals as this will identify struggling agents

Turn insight into action.
With built-in direct mail templates agents can create campaigns that highlight their strengths and win over sellers.
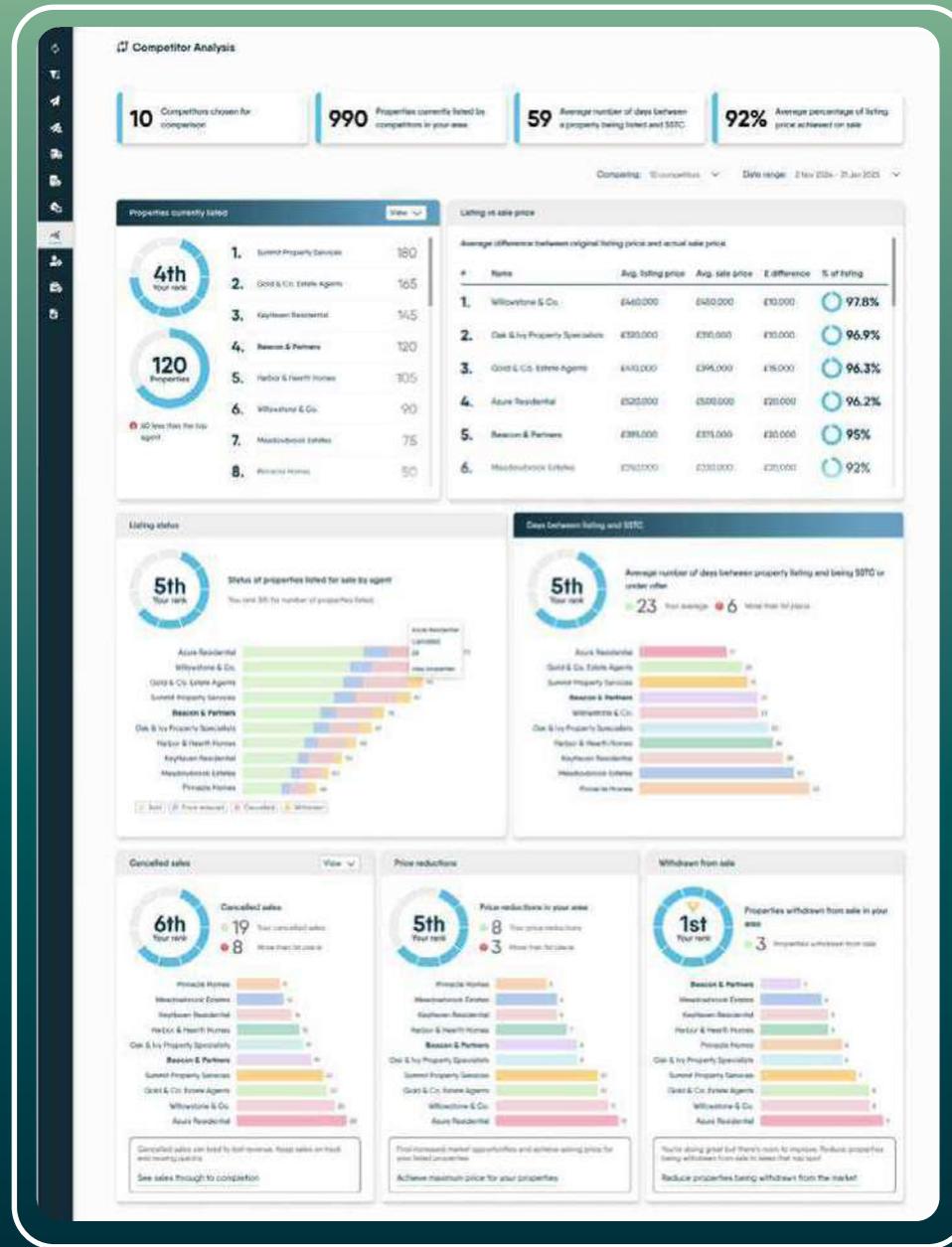
Marketing Toolkit

iamproperty

Proposition

Features

Pricing

Competitor Landscape

FAQs
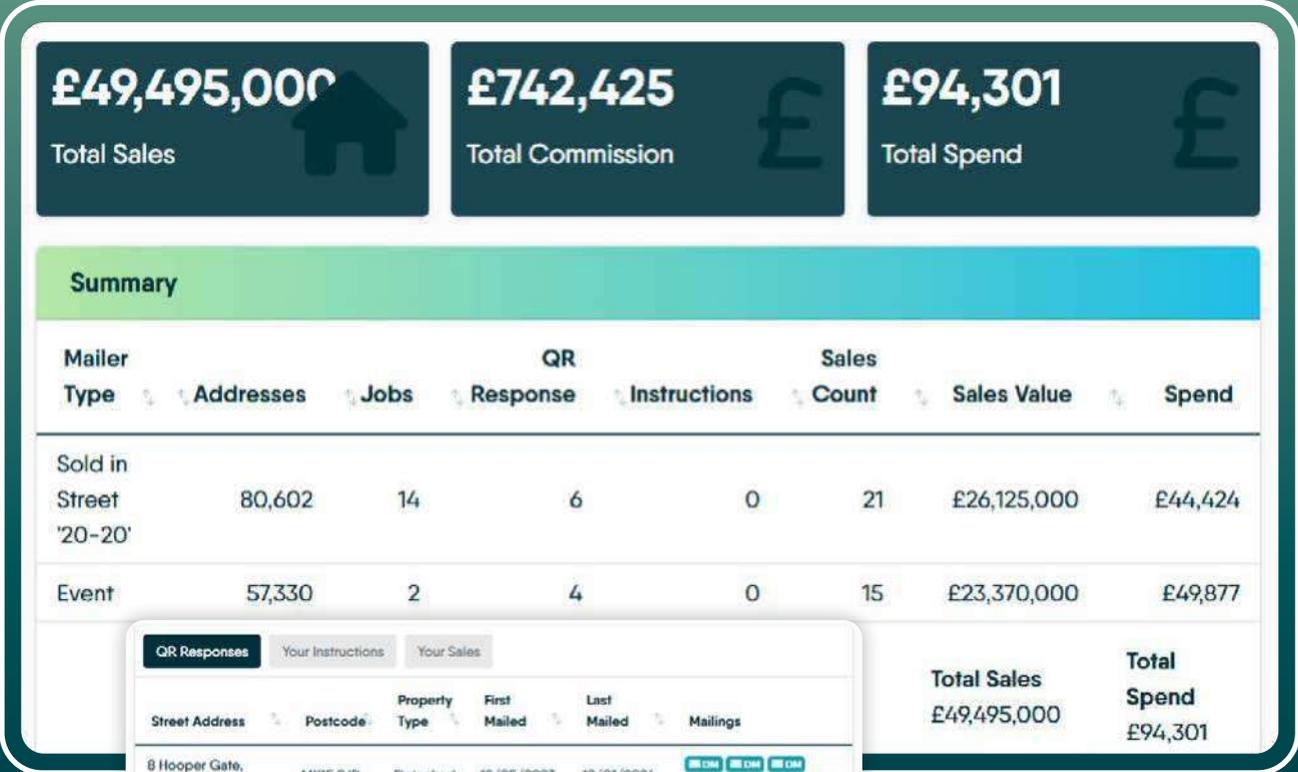
Book a Demo

Ecosystem Solutions

REPORTING DASHBOARDS

Powerful insights, greater ROI.

With a clearview of how campaigns are performing and what's delivering results, it's easy for our agents to optimise activities and improve results.

+ **Company level:**
Tracks performance, monitors spend, and builds detailed reports by branch or business-wide — all automatically.

+ **Campaign level:**
Shows total sales, commissions, and spend. Agents can drill into individual campaigns to identify what's delivering the best ROI.

+ **Individual level:**
Match responses to instructions and sales gives our agents a clear picture of what's working — and what's not.

Marketing Toolkit

+ iamproperty

+ Proposition

+ Features

+ Pricing

+ Competitor Landscape

+ FAQs

+ Book a Demo

+ Ecosystem Solutions

ONBOARDING & PRICING

	Option 1	Option2*	Option 3*
Modules included	**Data & Prospecting**	**Option 1 + Market Appraisal module**	Option 2 + £150 print
Setup cost (per agency)	£0	£499	£499
Monthly Branch Subscription	£50 p/m/pb	£99	£200
Additional valuers (3 per branch included)	X	£25	£35
Branded prospecting flyers	✔	✔	✔
Branded Property Reports & Insights	✔	✔	✔
Appraisal bespoke designs or dev requests	X	POA	POA
Pre-appraisal template	X	5 Pages	5 Pages
–Circumstance checker page set up	X	✔	✔
–Limited changes for subsequent branches	X	✔	✔
Main presentation template	X	10 Pages	10 Pages
–Limited changes for subsequent branches	X	✔	✔
–Services pages and configuration setup**	X	✔*	✔
Market update setup	X	✔	✔
Reporting and Competitor Insights	✔	✔	✔
Branch onboarding & setup	✔	✔	✔
Training	✔	✔	✔

OPTION 2 OFFERS

OFFER 1*
Setup £0
3 months free
12-month contract

OFFER 2*
Setup £0
6 months free
24-month contract

*You can cancel within 30 days from the start of your contact.

**iamproperty services & Private Treaty

- 🏠 **Marketing Toolkit**
- ➕ **iamproperty**
- ➕ **Proposition**
- ➕ **Features**
- ➕ **Pricing**
- ➕ **Competitor Landscape**
- ➕ **FAQs**
- ➕ **Book a Demo**
- ➕ **Ecosystem Solutions**

COMPETITOR LANDSCAPE
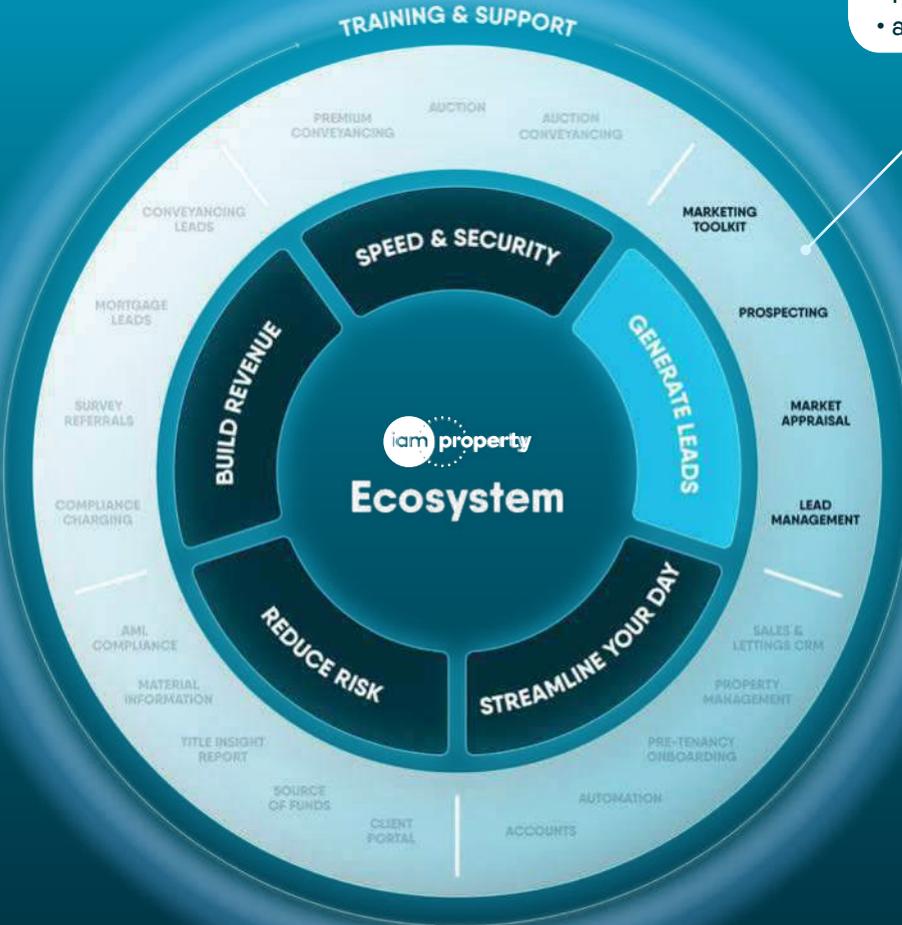
Prospecting tools

- Spectre
- Homesearch
- Sprift
- Nurture
- acaboom

Ecosystem diagram:

TRAINING & SUPPORT

Outer ring segments: PREMIUM CONVEYANCING, AUCTION, AUCTION CONVEYANCING, MARKETING TOOLKIT, PROSPECTING, MARKET APPRAISAL, LEAD MANAGEMENT, SALES & LETTINGS CRM, PROPERTY MANAGEMENT, PRE-TENANCY ONBOARDING, AUTOMATION, ACCOUNTS, CLIENT PORTAL, SOURCE OF FUNDS, TITLE INSIGHT REPORT, MATERIAL INFORMATION, AML COMPLIANCE, COMPLIANCE CHARGING, SURVEY REFERRALS, MORTGAGE LEADS, CONVEYANCING LEADS

Inner segments: SPEED & SECURITY, GENERATE LEADS, STREAMLINE YOUR DAY, REDUCE RISK, BUILD REVENUE

Center: **iam property** Ecosystem

Right navigation:
- Marketing Toolkit
- iamproperty
- Proposition
- Features
- Pricing
- Competitor Landscape
- FAQs
- Book a Demo
- Ecosystem Solutions

ONE SOLUTION. EVERYTHING YOU NEED!

KEY

🟩 Comprehensive Offering

	iam property	Homesearch.	nurtur	sprift	SPECTRE	acaboom
Prospecting	🟩	🟩	🟩	🟩	🟩	—
Property Reports	🟩	🟩	—	🟩	🟩	—
Competitor Insights	🟩	🟩	—	🟩	🟩	—
Property Insights	🟩	🟩	—	—	—	—
Market Appraisal	🟩	—	—	—	—	🟩

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SPECTRE®

The UK's Leading instruction generation tool. We help move real estate to the digital age. Since launching in 2015, our mission has been to put the process of winning second instructions on autopilot, allowing agents to allocate their time and resource where it's needed most.

Product overview

+ Sales: off-market, on-market and Anniversary targeting

+ Letting: Land registry integration – target landlords, Advertised to let property, currently let with tenancy renewal dates

+ Spectre AI: Marketing targeting, Tailored to your agency and demographic – maximising ROI by targeting properties most likely to instruct

Pricing

+ Monthly subscription – per postcode sectors, p/m

+ Inner London – £45+VAT, 5+ sectors £39+VAT

+ Outer London – £39+VAT, 5+ sectors £32+VAT

+ Other – £32+VAT, 5+sectors £26+VAT

Strengths

+ Branding and client journey

+ Integrates with Street CRM and Reapit

+ AI targeting of prospects

+ Training Centre

+ User-friendly interface

Weaknesses/How we win

+ Pre-val data only, no onward journey

Kill points

+ Targeted prospecting with low mailing costs and follow up journeys

+ Spectre AI

Product comparison

	Spectre	Marketing Toolkit
Campaign types		
On-market prospecting	✓	✓
Off-market prospecting	✓	✓
Landlord targeting	✓	✓
Prospecting journeys	✓	–
Campaign triggers	✓	✓
Build your own campaigns	✓	✓
Admin and printing		
Campaign automation	✓	✓
AI targeting	✓	–
Direct mail print and fulfilment	✓	✓
Office printing	–	✓
Property Reports		
Property information reports PDF	✓	✓
Interactive/online property information reports	✓	✓
Client facing Property Report generator	✓	–
Reporting and data		
QR Code lead capture	✓	✓
ROI reporting	✓	✓
Market data	✓	–
Competitor data	✓	–

Homesearch.

Your ultimate weapon in the battle for market share. Grow your estate agency using our suite of lead generation, prospecting, and nurture tools. No matter what the market is doing.

Product overview

+ Property Reports – Seller, Landlord, Buyer and market updates
+ Off-market and on-market prospecting
+ Market data
+ Home finding service
+ White label Homesearch search engine

Pricing

+ Full monthly subscription, 3 month notice. £295 per month: https://homesearch.co.uk/pricing/
+ Lower price subscriptions available, depending on services
+ Letters print and fulfillment from 38p

Strengths

+ Off-marketing search engine providing an additional service for estate agents to offer clients
+ Market reports
+ Different Property Reports

Weaknesses/How we win

+ Limited to 6 postcode areas
+ Mainly letters
+ No additional print

Kill points

+ Prospecting tool that gets buyers for on or off the market properties

Product comparison

	Homesearch	Marketing Toolkit
Campaign types		
On-market prospecting	✓	✓
Off-market prospecting	✓	✓
Landlord targeting	✓	✓
Prospecting journeys	–	–
Campaign triggers	✓	✓
Build your own campaigns	✓	✓
Admin and printing		
Campaign automation	–	✓
AI targeting	–	–
Direct mail print and fulfilment	✓	✓
Office printing	–	✓
Property Reports		
Property information reports PDF	unknown	✓
Interactive/online property information reports	✓	✓
Client facing Property Report generator	unknown	–
Reporting and data		
QR Code lead capture	–	✓
ROI reporting	unknown	✓
Market data	✓	–
Competitor data	✓	–

- Marketing Toolkit
- + iamproperty
- + Proposition
- + Features
- + Pricing
- + Competitor Landscape
- + FAQs
- + Book a Demo
- + Ecosystem Solutions

Sprift
Know any property instantly

Our award-winning platform provides you with all the data you need to support your interactions with vendors and buyers, helping you win more listings and close more deals by showcasing your local market expertise.

Product overview

+ Printable PDFs, dashboards, interactive Property Reports

+ White labelled – customised content, with different reports for different targets i.e. market appraisal report, Key facts for buyers

+ Lettings and sales data - Sold for, for sale/let for, EPC, when sold, when built, planning, utilities and mobile

+ Track opens and receive alerts

+ Competitor analysis - listings, stock type and sales achievements

+ Watch Video

Pricing

+ Usage-based pricing policy, paid on a contract basis

+ OTM offer £50 per month (usually £75) sales or lettings or £75 pm for both (usually £125) (2021 pricing)

+ Competitor analysis – 3 areas free £5 if additional areas added

Strengths

+ Fully white labelled

+ Share access to information

+ Competitor analysis based on data from their local area

+ OTM and Dezrez, Mri integrations

Weaknesses/How we win

+ They have no additional services

+ Material information is from integrations – not verified by vendor. We have both services

Kill points

+ Trackable online reports, with open analysis

+ Competitor analysis

Product comparison

	Sprift	Marketing Toolkit
Campaign types		
On-market prospecting	●	●
Off-market prospecting	●	●
Landlord targeting		●
Prospecting journeys	●	–
Campaign triggers		●
Build your own campaigns		●
Admin and printing		
Competitor analysis	●	coming soon
White labelled	●	●
Printing services	–	●
Property Reports		
Property information reports PDF	●	●
Interactive/online property information reports	●	●
Client facing property report generator	●	–
Data types		
Lettings data	●	●
Sales data	●	●
EPC	●	●
Land reg	●	●
Comparable properties	●	●
Utilities and mobile	●	●
Local services	●	●
Education and health	●	●

acaboom

A leading provider of innovative property presentation and client communication tools. To empower estate agents with the technology they need to enhance their efficiency, effectiveness, and success in an increasingly competitive market.

Product overview

+ Before the Appraisal – Online presentation doc with limited slides for personalised valuer video, survey, notifications and appointment reminders.
+ During the Appraisal/after the appraisal digital presentations (see next page for details)
+ Follow ups – Notifications, daily update reports, prospect reminders, priority prospects
+ Client Nurturing – Market update reports, Notifications on any client whos opened the proposal

Strengths

+ Additional service for mortgage advice
+ There is an animation library for agents to pick from
+ Notifications on all aspects of the journey (not unique to them)
+ They have the option for E-sign (we offer this in CRM)
+ They have integrations with Reapit, Miri, Rezi, Street Loop. We will have them with Reapit and ours

Weaknesses/How we win

+ They limit templates - we have unlimited presentation and email templates.
+ With us they can edit/create templates themselves or use our setup service.
+ They limit the additional slides in a deck, with us they can have as many as they want.
+ They charge for surveys, we have them as standard
+ We have sale method information built in.
+ We have additional property data fields.

Product comparison

Feature	Acaboom	iamproprty
Primary Focus	Compliance	End to end onboarding
Unlimited template library	–	✓
Bespoke slide creation	Limited- 1-2 per toolkit	✓
Pre appointment presentation	✓	✓
Main presentation/Digital proposal	✓	✓
Surveys	at cost*	✓
Recommendations based on circumstance checker results	–	✓
Personalised valuer video	✓	✓
Homeowners property data	✓	✓
On market & sold comparables	✓	✓
Local and national market data	✓	✓
E-sign	at cost*	–
Clients digital footprint & read notifications	✓	✓
Prospect ranking	✓	✓
Daily activity reports	✓	✓
Client reminders to view proposals	✓	✓
Ongoing nurturing with market update reports	✓	✓
Ongoing customer service support & training	✓	✓
CRM integration	✓	✓

Additional cost* Free with business package or £95 Per toolkit

Navigation

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Pricing

+ Main office subscription £149
+ Subsequent offices £99

	Starter	Professional	Business	Enterprise
Setup cost	£225	495	£925	£1,245
Bespoke content slides Pre-val	£495	room	room	room
Bespoke content slides Main presentation	1	4	9	12

KEY

▬ **Comprehensive Offering**

FAQs

GENERAL

I have a general question and want to get in touch with the team, who do I contact?

Our agents can use Live Chat which is available across every page of the Marketing Toolkit to speak to one of our team members.

Alternatively, call the team on 020 3089 1177 or email info@informationworks.co.uk.

PROPERTY REPORTS

I want to create a Property Report, is there anything I can set up in advance?

Go to 'Account Administration' > 'Account' > 'About Us.'

Here agents will be able to enter an overview of their company and branch specifically, as well as add a team photo and a branch photo to appear within each Property Report downloaded or ordered to branch, rather than entering it each time they go to produce a Property Report.

Testimonials can be added to Property Reports, just go to 'Account Administration' > 'Account' > 'Testimonials.' Then enter testimonials, including star ratings if required. This will then be placed on each Property Report downloaded or ordered to branch, rather than agents having to enter it each time they go to produce a Property Report.

Can you change the number of pages in the Property Reports?

The standard template for Property Reports has 12 pages. Agents can choose to remove sections from the report which may reduce the length. If they would like to discuss the possibility of having different templates, agents contact us via the in-platform chat or by calling 020 3089 1177 or emailing info@informationworks.co.uk.

Can you get the Property Report in other formats other than PDF, for example PNG?

Property Reports are available in physical printed form, PDFs and via QR code links on direct mail and letter campaigns. Other image formats are not currently available.

Where in the journey are the Property Reports used, for example, Pre-Val, On-Val, Post-Val?

Property Reports can be used at all points in the valuation journey but primarily for the pre-valuation and on-valuation stages.

Is the Dataloft local market data configurable?

Dataloft local market data is pre-set to the postcode districts covered by the branch there are currently no additional configurations for this data.

What if there are no images or other data, for example, EPC for the property?

If the property is currently on the market the photos will automatically pull from the portals for our agents to select from. However, if the data is missing, some data fields, such as EPC, can be uploaded via the agents own images, or these pages can be exclude from the Property Report.

DIRECT MAIL

What is the difference between Map Search and List Search?

Map Search uses Google Mapping technology to present all residential addresses across the UK. Agents enter a postcode to use as their centre point and target by either radius, polygons, or quantity to create an address list for their campaigns.

List search allows agents to select from a list of streets, localities, or postcodes that they have available on their account, to allow them to build their market share in a range of areas.

Once they have moved past the first page of either map or list search the entire process, templates our agents have access will appear. Agents will then be able to 'Filter Addresses' and view 'Available to Mail' through both options and finally proceed to the 'Template Gallery'.

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On the landlord mailing How much does it cost for the Title deed and then to mail?

The Title deed costs £3.00 (Ex VAT) from our integration with Land Registry. This is paid for as credits, in advance of the purchase. Once agents have purchased the Title document, they can then process their order for the mailing and agents will then be invoiced for this in the usual way.

The Title document includes the full name and the registered address of the landlord, which will be added to history for future use.

I don't have time to place an order this week but want to get campaigns out more frequently.

We recommend agents automate orders for future use, allowing them to set up specific campaigns in advance, targeting the right prospects, on time and within budget.

Depending on the facility they might want to automate, click into 'Automated Mailings' and then click into the relevant service. To add a new automated schedule, agents need to select the schedule name, run frequency, template, and signature sign off. Then once that's done, activate the schedule and its saved. Automation will run indefinitely, until agents decide to edit or pause the campaign.

On the morning of the campaign, agents will be sent a reminder email to let them know the campaign is going out. Agents can then review the campaign and costings, or cancel the send prior to 4pm. If no action is made in this time, the campaign will be sent out.

How do I upload my own address list but still access the wide range of templates available?

Go to 'Direct Mail – Resident' < 'Data Upload.'

Upload a spreadsheet of addresses to send a campaign to (This will be for our agents use only). Agents can use our sample layout to help guide them through the process.

Once the address list is uploaded, agents are then able to coordinate it against the Royal Mail PAF address file, meaning all of their addresses are matched against the Royal Mail and are therefore mailable in the UK.

The addresses can then be filtered using our range of property filters available and then agents are able to go through and utilise any templates available on their account.

I was working on a job, but I didn't finish it and I have been logged out, where do I find it?

All jobs get automatically saved at any point. Agents can then simply pick them back up later. To find the job go to 'Job Management' > 'History' > 'In Progress.'

Agents can view the date, user and data list created and a preview the template. Click 'Use' on the relevant job and agents will be taken back into the part they were working on.

ORDERS & PRINT

What are the delivery times?

Orders are sent twice daily to print. If you order before 1pm, it will be sent to print the same day.

+ We advise 5–6 working days from the point the order is placed for Direct Mail.
+ We advise 4–5 working days for Office Delivery.
+ We advise 1 working day for printed Property Reports delivered to branch.

How can you guarantee next day delivery?

Next working day delivery is guaranteed for all printed Property Report orders placed prior to 12pm, as they are delivered by courier.

Who is your print supplier?

Our print supplier is Print Concern Ltd. They also issue all invoices on our behalf and so each invoice agents receive will contain their details for payments.

How do I see what jobs I've sent out?

Go to 'Job Management' > 'History' > 'Completed.'

Here agents will be able to see all historic orders, including their Job ID, date sent, the user that produced the campaign and preview of the mailing sent.

If agents want to see any of the addresses mailed in a specific historic campaign, click 'View Data.' To view historic campaigns go to 'Re-Use.'

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I've placed and order, but I have changed my mind and want to cancel it.

Agents can cancel their order by call us on 020 3089 1177. They need to call to cancel within an hour of the order being placed, or for automated jobs, within an hour of receiving the email confirmation. This will allow us to catch the job before it has been fully processed. After that time the agent will be charged in full. Agents need to provide the job reference and the record count, so we can rectify the cancellation as quickly as possible for you.

I've sent a job for approval, but it hasn't been approved yet.

Go to `Job Management' > `History' > `Pending Approvals.'

Agents can then resend a specific campaign for approval.

I can't mail this postcode.

Agents might not have access to this postcode yet. Throughout various products within the site, if a postcode is not covered it will show as 'out of territory.'

We can add this to their account for them, they just need to contact us with the postcode and it will be applied free of charge. They may need to log out and back in to see the new addition.

Can you check an order for me?

They need to call us, email us, or use Live Chat and let us know the name or order ID of the job so we can check it has been processed.

Once an order is confirmed through the site, agents will be sent an automated confirmation email, with a proof of the mailing, as well as costings and a unique order number.

TEMPLATES

I need an alteration on one of the templates currently on the system.

Email our design team who will be able to assist at templates@informationworks.co.uk

I've requested an update, but I can't see any changes.

If agents can't see the changes requested, they may need to clear their cache to pull the update through. Select 'Ctrl+F5' on the keyboard to refresh the page.

Alternatively, if agents are looking at the thumbnail of the template, they will need to click into the template itself to see all the changes, as there may be a delay with the thumbnail regenerating.

I need to add a template that I have created onto the Marketing Toolkit.

Email the design team the artwork at templates@informationworks.co.uk. The design team prefer PSD or PDF files where possible. The team can then add postage information, as well as the relevant crops and bleeds, if required.

How do I view all the templates on my account all in one place, and view the differing costings?

Go to 'Account Administration' > 'Template Gallery.'

Here agents can click into each template and go through each of the pages available. They are also able to see their placement within the Marketing Toolkit and can click into each to view more information including their category, campaign type, size, standard weight, and price.

If there is a particular template agents would like, but require a few adjustments, they need to contact our design team at templates@informationworks.co.uk

PROFILES

What are profiles?

Profiles are pre-set filters on your account, and are located within `Profiled Direct Mail' on the main menu. A range of profiles have already been created. Agents can then target homeowners that match the profile and they can be filtered down further within the list and map searches.

Agents are also able to see profiles within each of the products on their account, if they would like to activate a profile they click 'Select Profile' and then click on the relevant profile required for their campaign.

Some branches will have pre-set profiles set against the entire branch, showing as 'Using Profile.' If agents want to identify this profile, click into section and there will be an information (i) explaining what the profile is excluding from agent's campaign list.

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I want to add a profile to my branch myself, how do I do it?

Firstly, agents need to make sure they have the relevant permissions and allowances to action this change, within their own company.

If they want to add additional profiles onto their account, click into 'Manage Profiles' and create and activate and new one. Agents can lock profiles, so it will be automatically applied against all products across their entire account. And if they select 'Group Profile' all their agency branches will receive this additional profile.

Finally, you can include this in the main menu by clicking `Include in Menu` this will then be created within the `Profiled Direct Mail` section of the menu.

SYSTEM & DATA

How accurate is the data in the system and who provides it?

The data is sourced from different providers, including the 3 main property listing portals (Rightmove, Zoopla and OTM), the Land Registry, open Government data sources and local councils.

All data is compiled, cleaned, and managed by iamproperty (Information Works) and goes through several matching and verification processes to ensure the data is as accurate and up to date as possible. The cleaning and management of the data is an ongoing process, and we are constantly reviewing and improving our procedures based on customer and internal feedback. We also regularly look for new and alternative sources of data so that we can improve our data offering and validation processes.

How frequently are the data sources updated?

The data is updated on various frequencies depending on the type of data. For example, portal listings and status changes etc. are updated daily, EPC data is updated weekly and most other data such as Land Registry sales prices is updated monthly. Some data such as schools, NHS etc is updated less frequently in a 7-day window, as and when it is made available.

I've received a call from someone that doesn't want to receive mail anymore, can I remove them from the mailing list?

If someone would like to be removed from future mailings

lists, agents can suppress an address. Go to 'Job Management' > 'Edits' click 'New Edit' and then enter the postcode of the property that needs to be removed.

A list will appear below, pop a tick in the box next to the address to be removed and select 'Do Not Mail' from the drop-down list of addresses. Then select a duration between 6 months and 3 years and click 'Apply.'

The relevant address suppressed will then appear in the 'Existing Suppressions and Flags' list with the status of 'Do Not Mail' along with the date that action was applied. Any addresses removed in this way will automatically be removed from future campaigns until the duration date has been reached.

ACCOUNT MANAGEMENT & BILLING

Can the system be set up so certain elements can be managed centrally vs. branch level?

Profiles suppressions and automation can be set up at both branch level and centrally. Budgets, approvals, and central campaigns (bulk campaigns to be sent from the entire group) can be managed centrally as well. Agents looking to set up campaigns centrally need to contact us and we'll discuss the best route forward for their agency.

How do I set the primary branch?

Branch set up is done from the iamproperty homepage or within the CRM. Click the Marketing Toolkit link. If you're the first person from your agency to register, we'll contact them to complete the registrations details for the agency. This will include, Primary branch details as well as other office information, logo, colours, fonts, and postcode areas they would like the account to cover.

How can I set up an approval process for print jobs?

Contact our customer service team on 020 3089 1177 or email info@informationworks.co.uk, to discuss options or if agents know how they would like it to work they can send the approvers name, email address and how they would like the process to run and we will action it for our agents.

The approval person is on holiday, how can I temporarily change them?

Let our team know and we can action the change for any length of time our agents wish, or we could add a secondary person for a set period of time.

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Can I add more than one approver of print jobs?

Yes, agents can set as many approvers as they wish to a group. All approvers will be able to access all jobs being sent for approval and will be able to approve or reject each campaign through an approval page on their account.

How will I be invoiced for print and fulfilment and when will it be due to be paid?

Agents will receive a weekly invoice for the previous weeks print, fulfilment and downloaded Property Reports. This is 28 days from the date of invoice.

How do I add Land Registry credits to my account to get landlords addresses?

Start by going into any of the 'Direct Mail – Landlord' Products. At the bottom of each of these services agents will be able to click into 'Purchase Credits.' From here agents will be able to purchase credits towards landlord information, including their full name and registered address.

+ It costs £3.00 (Ex VAT) per credit and the minimum order quantity is 10 credits. If agents don't use all these credits at once they will remain on their account.

+ Credits can be either purchased through credit card via a secure stripe link or through bank transfer.

+ Once credits are available on account agents can 'Lookup Title' and purchase them to then create a campaign specifically aimed at a landlord rather than a resident of a property.

How can I change the billing address/branch?

Contact our customer service team on 020 3089 1177 or email info@informationworks.co.uk, and send details of the existing and new billing address. We can also change billing contact name and email address and add multiple individuals if required.

How can I setup print budgets?

Contact our customer service team on 020 3089 1177 or email info@informationworks.co.uk to tell us which branches will require which budget amount, whether it will be rolling or fixed and the reset period.

Who can see the budgets and are these set at branch or agency level?

All users of the relevant branch can see budget remaining as they produce a campaign. This allows them to keep track of spending.

Where can I see how much budget I have left?

Go to 'Account Administration' > 'Account' > 'Budgets.'

Here agents can see their available budget and how much they have spent so far this month. This helps agents managed their campaign investments.

I've gone over budget and can't send my job to print, help?

If agents go over their budget in a single campaign it will not be able to proceed to print and the confirm button will be frozen. The budget at the bottom of the page will be in red.

Agents can reduce the number of mailings in their campaign by clicking back to 'Step 1' and lower the number of mailings and then click back into the confirmation page to confirm the order successfully. However, if agents don't want to amend the campaign in any way, agents will need to get in touch with their manager to request additional budget to be added to your account and confirm it with our customer service team by contacting info@informationworks.co.uk

## I've been asked to send our accounts team an invoice, how do I do that?

Go to 'Account Administration' > 'Account' > 'Invoices.'

You can see and download the weekly invoices and see details of who is receiving the automatic emails. The Invoices are sent on a Sunday night consolidating the previous weeks activity. You can also edit existing and add additional email addresses to the invoice emails.

How do I see the areas my branch is covering, and can I add new ones?

Go to 'Account Administration' > 'Account' > 'Allocations.'

If any changes/updates are required contact our customer service team.
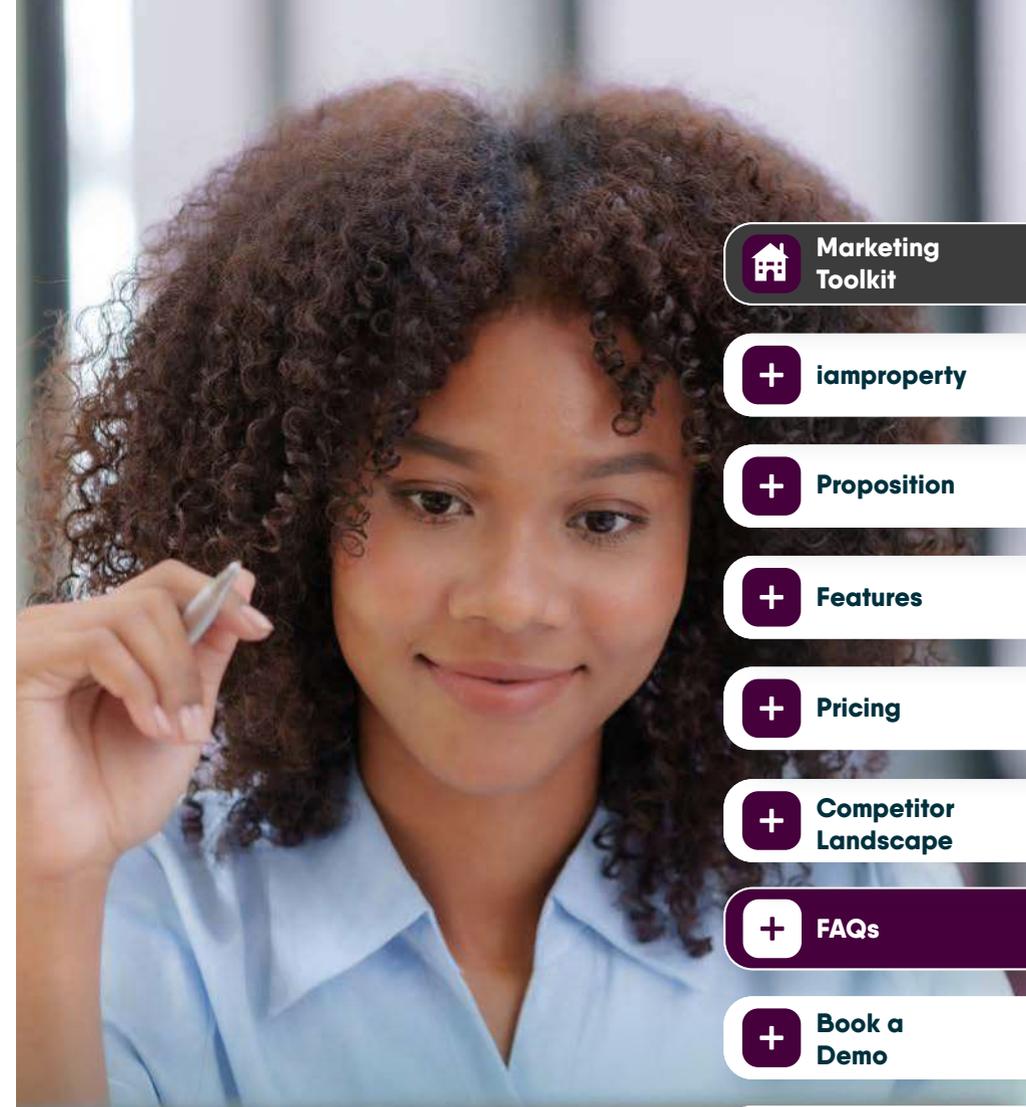
Marketing Toolkit

+ iamproperty

+ Proposition

+ Features

+ Pricing

+ Competitor Landscape

+ FAQs

+ Book a Demo

+ Ecosystem Solutions

We have a new starter at the office, and we need to arrange access for them.

They can either register through the link on the my.iamproperty homepage and CRM or send us their first name and surname, email address and confirm the office(s) they require access to so we can setup the access. Once we've set them up they will have access to the branches Marketing Toolkit account.

Online training is also available for new users, this normally last around 30 minutes. Alternatively, users can access our on-demand training videos within the Marketing Toolkit, which will take you through the platform at their own pace.

REPORTING

How do I see who has scanned the QR codes on my templates?

If agents have opted for trackable QR codes, go to 'Reporting' > 'QR Scan Results.' Agents select the specific timescale they want to work from, then click 'Refresh' and it will pull a list of all QR codes that have been scanned. The report will include the Job ID, campaign name, office name, specific address that scanned the QR code, as well as the date and time the QR code was scanned.
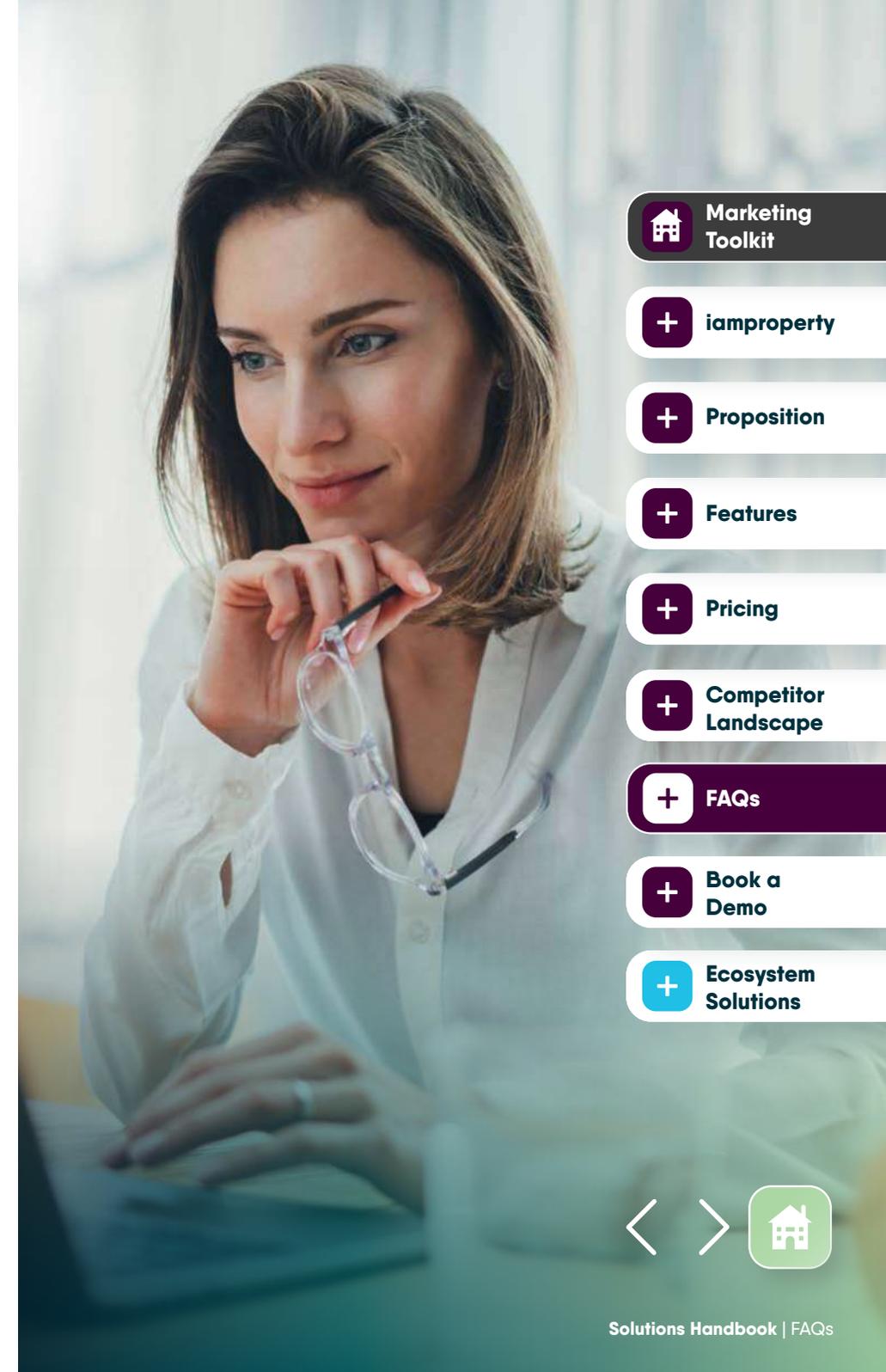
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MARKET APPRAISAL
FAQS
COMING SOON

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BOOK A DEMO

The demo will help our agents understand the benefits of setting up targeted and automated campaigns to help maximise their marketing investment, win more instructions and increase their marketing share.

IN THE DEMO WE'LL SHOW:

+ On-Market Prospecting

+ Off-Marketing Prospecting

+ Market Appraisal

+ Property Insight

+ Trigger and automation campaigns

+ Smart Filters

+ Reporting dashboards and campaign tracking

If our agents would like a detailed demo of the Market Appraisal module, or an overview of the Marketing Toolkit platform, please contact Tatyana or David. David will also cover the integration process between Market Appraisal and CRM.

Tatyana Ross
Senior Manager of Business Operations

To book a Marketing Toolkit demo contact:

t: 020 3089 1177
iamproperty@informationworks.co.uk

David Wilton
National Sales Manager

To book a Market Appraisal demo contact:

david.wilton@iamproperty.com

IAMPROPERTY CRM

IAMPROPERTY CRM
HOW WE WIN

Our CRM sits at the heart of our ecosystem. Built to put agents in control, they can manage their agency their way.

OUR SOLUTION MESSAGE

MAKE YOUR OWN RULES

Finally, a CRM as unique as you. Built to put you in control, you can manage your agency your way. It's flexible and it's cloud based. It gives you the tools to grow your agency, streamline your processes and delight your clients.

Everything you need, without breaking the bank. With Sales, Lettings, Property Management and Accounts as standard. It's the smart choice for forward thinking Estate Agents.

EVERYTHING YOU NEED, WITHOUT BREAKING THE BANK.

Functionally rich. Cost conscious. With Sales, Lettings, Property Management and Accounts as standard. It's the smart choice for forward-thinking Estate Agents.

WORK SMARTER. GROW FASTER.

No more time sucking admin. No more missed opportunities. Complex tasks made easy. With over 1,800 automations, triggered lead-gen campaigns and optimised workflows at your fingertips, our CRM works while you sleep and frees you up to do what you do best.

SUPPORT ON YOUR TERMS.

Be gone outdated ticketing systems! Our specialists are here to help – whenever and however you need it, in a way that works for you. Telephone, email, in person – you choose, we're here.

THE IAMPROPERTY DIFFERENCE.

Success fast-tracked. With our unique blend of people and technology and all the benefits of our integrated Next Gen agency solutions – we're your perfect partner, today and tomorrow.

Our switching promise - we'll do it quicker and with more support. With our ready to go migration scripts transferring ALL your data and API tool suite, we'll have you up and running in no time. Less stress. Less hassle. More support.

REASONS TO BELIEVE

4.7/5
Google review

IN 30 SECONDS WE'LL ANSWER THE CALL
No logging tickets and waiting in a call queue. We are on hand to help our agents every step of the way.
*During business hours.

STAND OUT PROSPECTING
Win more instructions and grow your market share with the Marketing Toolkit.

35 YEARS IN PROPERTY CRM

965 Agents   **802** Branches

SWITCHING PROMISE
We'll get you up and running quicker with more support.

MIGRATE 100% STATIC DATA
We've been migrating agents data for over a decade with a 100% success rate of static data.

OVER 1,800 UNIQUE AUTOMATIONS
Agents can make their own rules to fit every process.

113,735 PROPERTY MAINTENANCE JOBS
Completed in 2024.

18,744 PRE-TENANCY JOURNEYS
Completed in 2024.

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+ Target Audience
+ Competitor Landscape
+ What our Agents Say
+ FAQs
+ Book a Demo
+ Ecosystem Solutions

IAMPROPERTY CRM AT A GLANCE

Our CRM's flexibility allows our agents to add-on modules to suite their agency requirements.

Our USP is automation, saving countless administrative hours for our agents - its like having another team member!

Sales and Lettings CRM

From Prospecting to Sales Progression and Property Management, all the tools needed to take care of Sales and Lettings in one central intuitive system, one login and one client view.

+ Property matching with clients

+ Client Portals

+ Online bookings

+ Speedy sales progression

+ Property management and inspections

+ Lettings Compliance

+ AML Compliance

+ Personalised brochures, SMS and emails

+ Reporting dashboards

Client Portal

Saves time and enhances client satisfaction.

+ Effortless communication

+ Personlised branded experience

+ For all client types

+ Better relationships. Less admin

Client Accounting

From rent chasing automations to landlord statements, everything's connected—no double entry, just streamlined property accounts management.

Pre-tenancy process

With documents and tasks in one place, from compliance docs, right to rent uploads and built-in e-sign for tenancy agreements, say goodbye to unnecessary admin and hello to delighted clients.

+ Prequalify tenants

+ Seamless tenant referencing with Rightmove, or Vision+ Homelet and LetAlliance*

+ Tenancy compliance

+ Customsiable client onboarding

+ Document upload

+ Online signing

*Additional third party charges apply.

Property Management & Inspections

Manage your landlord's portfolios effortlessly, from one central place – from inspections and maintenance jobs to effective and robust reporting. No need for expensive third-party add-ons – we have you covered.

Automations

Choose from over 1,800 rules or create personalised workflows. They save so much time – It's like having another pair of hands.

Stand out prospecting

Watch CRM feature videos

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IAMPROPERTY CRM KEY FEATURES

iamproperty CRM makes our agents life easier – It provides the right tools so they can accelerate their own success.

Sales and Lettings streamlined

From Prospecting to Sales Progression and Property Management, all the tools our agents need to take care of Sales and Lettings in one central intuitive system, one login and one client view.

Supercharged pre-tenancy onboarding

With documents and tasks in one place, from compliance docs, right to rent uploads and built-in e-sign for tenancy agreements, our agents say goodbye to unnecessary admin and hello to delighted clients.

Spreed up sales success

With a single view of sales progression, chain information and sales progress reports, our agents can keep transactions moving from sale to completion.

▶ Watch speedy sales video

Compliance. Covered.

Stay ahead of AML legislation with our movebutler integration. Agents can automatically import client details and AML information, with less duplication, less admin and less risk - its a one-stop shop for our agents AML Compliance needs.

Fast-track your day with automations

From over 1,800 rules our agents can create their own personalised workflows. They save so much time - It's like having another pair of hands.

Client accounts. Made simple

From rent chasing automations to landlord statements, everything's connected—no double entry for our agents, just streamlined property accounts management.

Effortless inspections

Simplify inspections, check-ins, and inventories with our all-in-one solution. With our Mobile first design, it's a one stop shop to streamlined property management.

Lettings, sorted!

Simple, more efficient journeys at every stage! From advertising and property matching to viewings, move-in and repairs, our agents can wow their tenants and landlords and never miss a task or opportunity.

Stress-free property management

Agents can manage landlord's portfolios effortlessly, from one central place – from inspections and maintenance jobs to effective and robust reporting. There is no need for expensive third-party add-ons.

SPEED UP SALES SUCCESS

With a single view of sales progression, chain information and sales progress reports, keep transactions moving from sale to completion.

Compliance. Covered.

Stay ahead of AML legislation with our movebutler integration. Our agents can automatically import client details and AML information, with less duplication, less admin and less risk – its a one stop shop for all their AML compliance needs.

One click property matching

Match buyers or tenants with the ideal property at the touch of a button.

Streamline sales progression

From offer to completion, our agents manage every stage with ease, with a single view of all key milestones, including notes and chain information.

Your own brand vendor portal

Agents can share progress and outstanding tasks directly through the Client Portal. Keeping everything moving and everyone informed.

At a glance sales performance

Track what matters – From appraisal to completions, our agents can monitor how their branch and agency is performing with the sales reporting dashboard.

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COMPLIANCE. COVERED. POWERED BY MOVEBUTLER

Stay ahead of AML legislation with our movebutler integration. Our agents can automatically import client details and AML information, with less duplication, less admin and less risk.

Easy AML checks.
Agents can send onboarding journeys to their clients directly from our CRM.

Agency wide compliance report.
Agents can view vendor compliance statuses from within transactions and clearly see what's needed with our out of the box agency-wide compliance report.

Manage transaction compliance.
Receive notifications for any missing AML checks, this ensures our agents are complying with the latest legislation.

Boost revenue on every transaction.
Agents can earn additional income by charging for AML checks and receive referral fees from add-on services.

Ecosystem integration

What's included in movebutler

+ Electronic confirmation from £3.40 per check
+ Biometric checks from £4.63 per check
+ Risk analysis
+ Upfront Material Information
+ Additional revenue generation
+ Client portal with full onboarding journey

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LETTINGS, SORTED!

From advertising and property matching to viewings, move in and repairs, we help our agents wow their tenants and landlords with an automated lettings service that makes sure they don't miss a thing, and can focus on building their agency's lettings pipeline.

Designed to automate must-do-tasks our CRM takes the hard work out of tenancy management and creates a simpler and more efficient journey at every stage, so our agents get to focus on building their agency's lettings pipeline.

> **"iamproperty CRM is designed to help every member of your team make the most of their day with ease. With minimal training needed and everything accessible in one place, you'll wish you moved sooner."**

One click property matching

Agents can match tenants with their ideal property at the touch of a button.

Instant eligibility checks

Verify tenant eligibility, right to rent, and references instantly, providing a hassle-free pre-tenancy experience.

24/7 online bookings

Prospects and applicants can book viewings when it suits them. Our agents will save time too with custom qualifying questions and direct booking slots.

Stay ahead of lettings compliance

Never miss a compliance deadline again. With automated reminders for crucial tasks like safety certificates, our agents will always stay ahead.

Supercharge pre-tenancy onboarding

With documents and tasks in one place, from compliance docs, right to rent uploads and built in e-sign for tenancy agreements, our agents can say goodbye to unnecessary admin and hello to delighted clients.

Compliance automations

From task creation and communications, to invoice matching, our CRM does the hard work for our agents. Complete with a full audit trail and built-in e-signatures.

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SUPERCHARGE PRE-TENANCY ONBOARDING WITH LETZONE

Our Letzone dashboard not only keeps our agent's admin to a minimum; it gives their prospective tenants a fantastic experience.

Prequalify tenants with ease.
With onboarding questions and Right to Rent checks as standard, our agents can ensure the right fit for the right property.

Seamless tenant referencing.
Fully integrated process delivering faster, more reliable tenancy decisions.

Stay ahead of tenancy compliance.
Keeping our agents compliant from data to document, at every stage is easy with our automated processes.

Customised client onboarding.
Our agents can deliver a bespoke onboarding experience with their own branded pre-tenancy portal. Plus, once onboarded they'll seamlessly transition to their branded tenant portal, where they can manage their tenancy.

Manage the entire pre-tenancy process with ease:

+ Pre-tenancy client login area

+ Online document signing

+ Document upload

+ Integration to Vision+ referencing including LetAlliance and HomeLet

+ Automated compliance

▶ **Watch video**

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STRESS-FREE PROPERTY MANAGEMENT

Agents can manage landlord's portfolios effortlessly, from one central place – from inspections and maintenance jobs to robust reporting. No need for expensive third-party add ons!

PROPERTY MANAGEMENT PORTAL:

Property maintenance
Tenants can report property maintenance tasks from within their portal.

Quick access to jobs.
Agents can view outstanding tasks, assign new jobs, track progress, and request updates from contractors.

Keep everyone updated.
Our Client Portal keeps all parties updated, reducing agents admin.

Contractor management – it's a breeze!
Adding jobs to contractors, is easy! The Client Portal updates status, certificates and automatically matches invoices once uploaded on job completion.

Automated invoicing.
Once invoices are uploaded, they are attached to the landlord statements.

Effortless Inspections.
Inspections, check-ins, and inventories are made easier with our all-in-one module. Mobile-friendly, no third-party tools needed and fully integrated for streamlined property management.

➕ **Add-on module**

▶ **Watch video**

BRANDED CLIENT PORTAL

Effortless, transparent communication

Managing updates for multiple clients can be complex, but with our Client Portal, our agents clients have the information they need at their fingertips. Available 24/7, the portal helps sales clients, tenants, landlords, and contractors stay informed, with minimal admin for our agents.

Personalised branded client experiences.

Agents can add their personal touch with their branding, making their clients experience more memorable.

Designed for all client types.

The Client Portal offers features for every type of client, enhancing service quality and reducing time spent on repetitive updates.

+ **Sales client**s can view property brochures, track viewings, and monitor sales progression.

+ **Tenants** can report maintenance issues, view important documents, and stay in the loop on property updates.

+ **Landlords** gain visibility into property viewings, financial statements, and rent payments. Automated reminders for essential compliance tasks like gas safety certificates keep them up-to-date and compliant.

+ **Contractors** receive instant notifications for new jobs, update on job status, and submit invoices directly in the portal.

BETTER RELATIONSHIPS. LESS ADMIN

Keep everyone updated in real-time, giving our agents more time to nurture relationships and grow thier agency.

FAST-TRACK YOUR DAY WITH AUTOMATIONS

Alongside our standard automation packages and 1800+ existing rules, our agents can define their own automations. It's like having another pair of hands, saving our agents so much time!

Automate your admin!
+ From SMS and emails to document handling, our automations take care of the admin, so our agents don't have to.

Automations that work your way.
+ We work with our agents to create personalised automations to suit their agency's needs. With thousands of existing and customisable rules – the possibilities are endless!

Manage compliance without lifting a finger.
+ Automate compliance reminders, job scheduling, and document management, keeping portfolios up-to-date and clients.

Effortless property approvals and matches.
+ Agents can automatically send listings to vendors for approval and instantly notify matching applicants of new properties.

Simplify the offer process.
+ When an offer is made, vendors and buyers are notified instantly. Once accepted, our CRM takes care of all the necessary follow-up communications.

Now agents can automate their prospecting with the Marketing Toolkit.

Automation

+ **Add-on module**

▶ **Watch video**

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+ Ecosystem Solutions

CLIENT ACCOUNTS. MADE SIMPLE

From rent chasing automations to landlord statements, everything's connected—no double entry.

Intuitive accounts dashboard.

+ Invoices, balances, expenses, deposits and rents all in one graphical view.

Reconcile on the go.

+ Agents can upload receipts directly into the system and produce summary payment lists to upload directly into their client account, reconciling as they go.

Accounts linked to lettings module.

+ No double entry requires as our accounts module data is linked to the letting processes.

One property. One view.

+ Mail merged email, postal statements and tenancy accounts information from the property record.

Accounts automations.

+ No more chasing outstanding payments with our automation workflows.

Proactive arrears management.

+ Payment reminders automatically chase arrears by email or SMS.

Contractor statements. Sorted!

+ Contractors upload invoices to their portal, so they're ready for payment and to be sent to the landlords.

+ **Add-on module**

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+ What our Agents Say

+ FAQs

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+ Ecosystem Solutions

SWITCH WITH EASE

iamproperty is about people and partnerships. Every agent has a dedicated Onboarding Specialist on hand every step of the way, making sure the switch to iamproperty CRM is pain free.

Our switching promise – we'll do it quicker and with more support. With our ready to go migration scripts transferring ALL their data and API tool suite, we'll have our agents you up and running in no time. Less stress. Less hassle. More support.

"The services that we use with iamproperty started with auction and have developed into compliance with movebutler and now CRM. These systems all make our life day-to-day much, much easier. They are an extremely efficient and modern way of thinking."

John Nicholson,
Managing Director,
Dowen Auction Sales & Lettings

OUR SWITCHING PROMISE

We'll do it quicker and with more support.

What our agents can expect from us

+   Consultancy and requirement scoping

+   Data migration and testing

+   Design and configuration

+   Personalised training

+   Go live

+   Post onboarding check

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TRAINING AND ONBOARDING

Our dedicated onboarding team makes the journey smooth for our agents and will get them up and running with no CRM downtime.
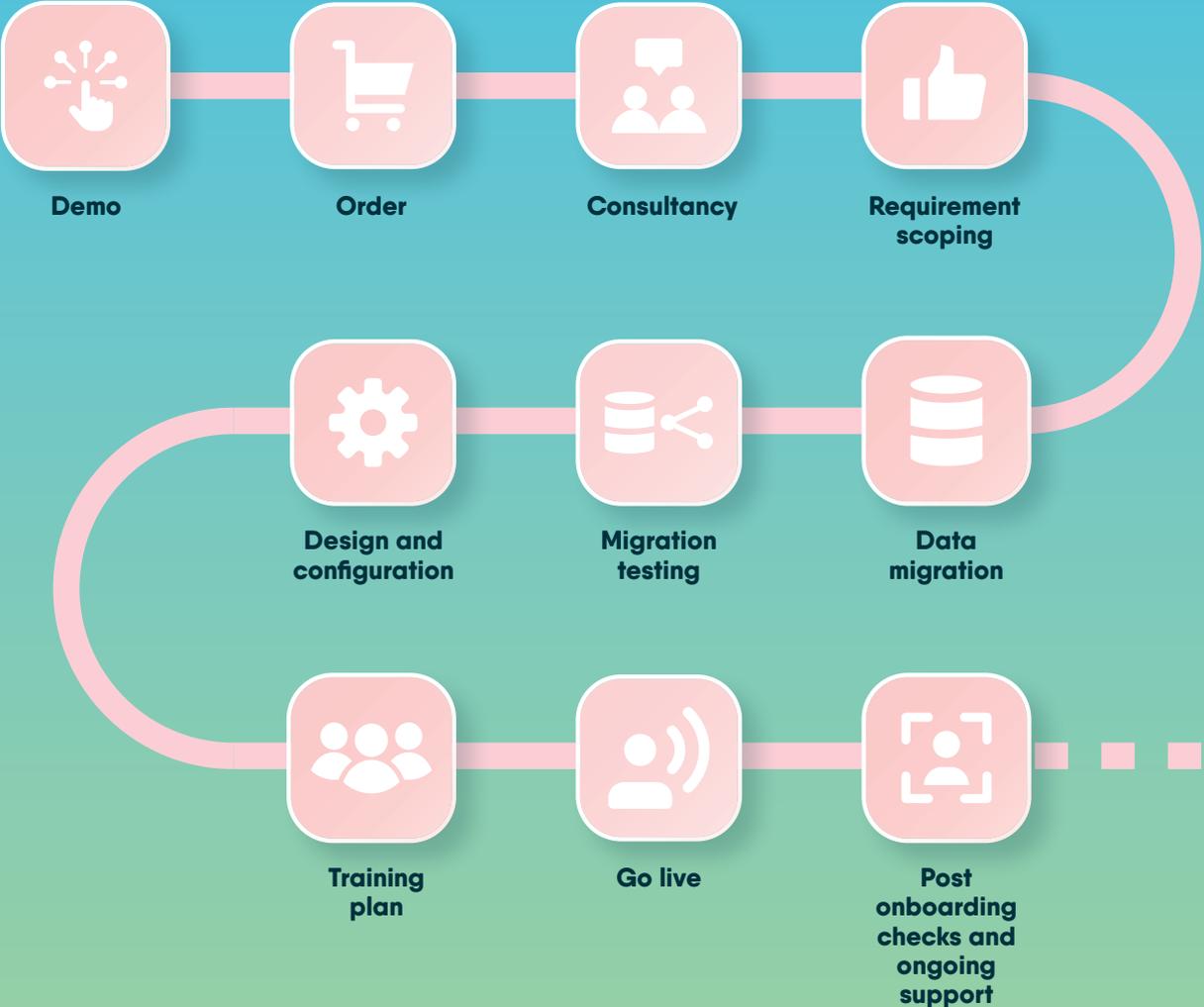
What's more, with our experience of working with Estate Agents, our dedicated support team will guide our agents through the onboarding process, getting them up and running quickly with support when they need it and with tailored training options.

Our comprehensive, personalised training plans, ensure our agents are set up for success from day one.

Training:

+   One day on-site training

+   Online sessions

+   Video library content and how-to-guides

Demo

Order

Consultancy

Requirement scoping

Design and configuration

Migration testing

Data migration

Training plan

Go live

Post onboarding checks and ongoing support

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CRM PRICING

Prices should not be quoted without qualification from our CRM sales team.

CRM Lite

Sales/Lettings/Prospecting

20 standard automations

1 x user £100

Additional users £75

Online training

Additional onsite training day at £600 per day

Set-up and migration £500 (12 month contract)

Set-up and migration £250 (24 month contract)

CRM Pro

Sales/Lettings/PM/Accounts /Prospecting/Legal Pack

20 standard automations

1 x user £100

Additional users £85

1 day onsite and free online training (subject to number of users as may need more onsite days)

Additional onsite training day at £600 per day

Set-up and migration £500 (12 month contract)

Set-up and migration £250 (24 month contract)

CRM Enterprise

Sales/Lettings/PM/Accounts /Prospecting/Legal Pack

20 standard and 10 bespoke automations

20 x users £1600

Additional users £75

3 days onsite and free online training

Additional onsite training day at £600 per day

Set-up and migration is free of charge

TARGET AUDIENCE

BUSINESS OWNERS/MD

"I've been in this environment all my career and there is nothing I do not know about running my business"

View Persona

Key messages

+ Functionally rich. Cost conscious. With Sales, Lettings, Property Management and Accounts as standard. It's the smart choice for forward-thinking Estate Agents.

+ No more time sucking admin. No more missed opportunities. Complex tasks made easy. With over 1,800 automations, triggered lead-gen campaigns and optimised workflows at your fingertips.

+ Our switching promise – we'll do it quicker and with more support .

Pain point	Counter comments
It's a challenging market, competition is increasing, and fees are unstable.	Choose from over 1,800 rules or create your own personalised workflows. They save so much time – It's like having another pair of hands, so our team can concentrate on winning more business. Boost your marketing ROI and make your prospecting campaigns work harder, delivering an average return of £62 for every £1 spent with our Marketing Toolkit. Integrate movebutler and iamsold Auction into your CRM to unlock extra income — without the hassle of duplication.
Stock availability is low, particularly in lettings.	Stand out from the competition with our landlord and tenant portals. Effortlessly manage your stock and make smarter, data driven decisions using our our Lettings and Property Management Dashbaords, and Lettings Reporting. Plus, boost your stock levels and connect with potential Landlords using our powerful Marketing Toolkit.
Its and everchanging landscape and there is always the threat of legislation changes.	Stay one step ahead of ever-changing legislation. With our Lettings Letters pack, powered by a CLC-certified legal partner, you can rest easy knowing all your standard lettings documentation is always up to date. Automate your property compliance, ensuring it's completed on time with minimal admin. Plus, stay compliant with AML regulations effortlessly through our movebutler integration—less duplication, less admin, less risk.
Switching CRM is just too hard, its fine the way it is.	Switching your CRM doesn't have to be a daunting task. Our switching promise – we'll do it quicker and with more support. With our ready to go migration scripts transferring ALL your data and API tool suite, we'll have you up and running in no time. Less stress. Less hassle. More support.

SALES OR LETTINGS VALUER

> "If I can spend quality time with people, I know I will help set the right price for them and I will get them on board"

View Persona

+ Designed to make your life easier, automate your must-do-tasks and supercharge your success and client experience.

+ Helping you deliver exceptional client experiences with ease and helping you stand out in your market.

Pain point	Counter comments
It's a challenging market, competition is increasing.	Stay ahead of the competition with our Client Portals. Designed for landlords and vendors, these dashboards give your clients instant access to the information they need, when they need it—helping you stand out and build stronger relationships.
I just want my day to go as smoothly as possible.	Built to make your day effortless. From intuitive dashboards that show your day's appointments at a glance to automations that handle the time-consuming tasks, everything works together to help you stay organised.
I have targets to meet.	Automate your daily must-dos and free up your time to focus on winning new business. With integrated client dashboards, streamlined communications, and powerful Property Reports as part of the Marketing Toolkit, stand out from the competition and stay ahead of the game.

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+ Ecosystem Solutions

SALES OR LETTINGS NEGOTIATOR

> "My days are so varied but I have a great team around me and a system that works so I just ensure I keep on my to do list!"

View Persona

+ CRM should automate your day, not dictate it.

+ Designed to make your life easier, automate your must-do-tasks and supercharge your success.

+ You're more than a number to us!

Pain point	Counter comments
I have targets to meet.	With over 1,800 automation rules and workflows, our CRM keeps working even when you're not. By taking care of repetitive tasks, it frees up your time to focus on what you do best—building relationships with clients and smashing your targets!
I have targets to meet.	iamproperty CRM is one of the most flexible solutions out there, built to work the way you do. Whether it's automating the time-consuming tasks, setting up custom fields, or creating tailored triggers, you're in control. It's a CRM that makes your life easier and setting you up for success.
If things go wrong, I want to be able to speak to someone.	Our specialists are here to help – whenever and however you need it, in a way that works for you. Telephone, email, in person – you choose, we're here.

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COMPETITOR LANDSCAPE

TRAINING & SUPPORT

AUCTION

AUCTION CONVEYANCING

MARKETING TOOLKIT

PREMIUM CONVEYANCING

PROSPECTING

CONVEYANCING LEADS

MARKET APPRAISAL

MORTGAGE LEADS

LEAD MANAGEMENT

SURVEY REFERRALS

COMPLIANCE CHARGING

AML COMPLIANCE

SALES & LETTINGS CRM

MATERIAL INFORMATION

PROPERTY MANAGEMENT

TITLE INSIGHT REPORT

PRE-TENANCY ONBOARDING

SOURCE OF FUNDS

AUTOMATION

CLIENT PORTAL

ACCOUNTS

AUCTION · **LEAD GENERATION** · **CRM** · **ONBOARDING** · **ADD-ON SERVICES**

iam property
Ecosystem

CRM

- Reapit
- Alto
- Jupix
- Expert Agent
- Dezrez
- Agent OS
- Street
- Rex
- Loop
- Apex 27

Navigation menu
- iamproperty CRM
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- Proposition
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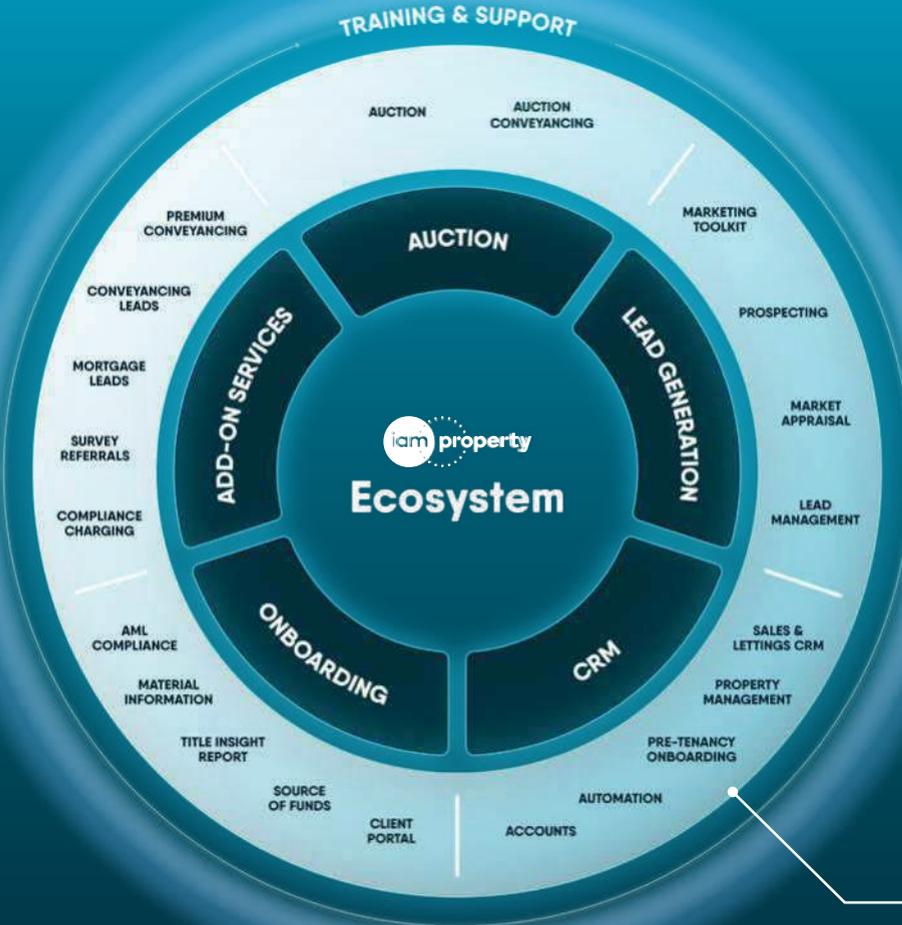
IAMPROPERTY CRM KEY COMPETITORS

KEY
- 🟢 Comprehensive Offering
- 🔴 Integrations or Group Offering

	iamproperty CRM	Street	Reapit	Alto	Loop
Custom workflows and automation	🟢		🟢		
Lead Generation / Prospecting	Coming soon	🟢	🔴		🟢
Contracts and engagement	🟢	🟢	🟢	🟢	🟢
Onboarding and Compliance	🟢	🔴	🔴	🔴	🔴
Digital contracts	🔴	🟢	🔴	🟢	🟢
Property marketing	🟢	🟢	🔴🟢	🟢	🟢
Conveyancing referrals	🔴				
Conveyancing updates	🟢	🟢	🔴	🟢	agent only
Financial Preparation	🔴				
Moving Services	🔴		🔴	Limited	
Pre-tenancy	🟢		🔴	🔴	agent only
Lettings Management	🟢	🟢	🟢	🟢	🟢
Inspections Management	Coming soon		🔴		
Property Management	🟢	🟢	🟢	🟢	
Client Accounting	🟢	🟢	🟢	🟢	🔴

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IAMPROPERTY CRM COMPETITORS

	Strengths	Weaknesses	Opportunities	Threat to us
Street	+ Addresses current market challenges with enhanced on and off market prospecting tools + Good UI on platform + API integrations and AI + Whatsapp and Slack integrations + Good industry influence + White-labelled App	+ Basic functionality with nothing on sales progression support other than communication App + Spectre focused around Pre-valuation data only + No Task Manager and Property Management and Accounts is still new, which can take a long time to perfect + Reports of poor customer service	+ Future API developments (more coming soon mentioned on the site)	+ Their prospecting tools and AI support is capitalising on current market trends
Reapit	+ Large number of integrations + Large customer base + Very well-known brand + Comprehensive system for Sales and Lettings + Strong reporting capabilities + Cloud version low set up costs + Designed for larger Estate Agents	+ Legacy system that has not really kept with the times + Poor customer service + Doesn't have automation + Doesn't have a Property Maintenance Task Manager + Not a true cloud solution + Solution will not work on Mac's only PC's	+ Further integrations	+ Agent apathy
Alto	+ Cloud based with the backing of a portal + Tried and tested accounts solution + App market place and building integrations fast inc. AML/Goodlord/ fixflo + API Hub for proptech companies + Free set up and becoming aggressive on price + Easy to navigate	+ Lots of manual processes (agent feedback) + Relies on 3rd party integrations + Not mobile friendly + Poor customer support + No custom automations + Rigid system with limited configurations	+ Migration tool to switch from Jupix to Alto in 4 weeks promoting a simple switch over process for agents	+ The number of API integrations is expanding the capabilities of the CRM quickly.
Loop	+ Addresses current market challenges with enhanced prospecting tools + Market intelligence + Low prices + 30-day contract + Website division	+ No Property Management + Contract period means they are left open to clients leaving + Smaller company with less financial backing	+ Integrations to expand their offering	+ Their prospecting and market intelligence tools are capitalising on current trends

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STREET GROUP

Street.co.uk is everything you wish your current Estate Agency CRM could be. Beautifully designed, easy to use and meticulously built with the sole purpose of making your life easier.

Product overview

+ Sales and Lettings CRM
+ Online bookings, Client Apps
+ Sales progression tracking
+ Dctor.photo

Pricing

+ 5p per WhatsApp message. AML Checks by Landmark £3
+ £6 per active property per month (min £300pcm)
+ £900 first branch set up fee – £200 for additional branches Startups – 50% discount for 12 months. Volume pricing, up to 50% discount for 2,500+ properties

Strengths

+ Addresses current market challenges with enhanced on and off market prospecting tools
+ Good UI on platform
+ API integrations and AI
+ Whatsapp and Slack integrations
+ Good industry influence
+ White labelled App

Weaknesses/How we win

+ Street itself has basic functionality with nothing on the sales progression support other than communication App
+ Spectre focused around Pre-valuation data only
+ No Task Manager and Property Management and Accounts still new, can take a long time to perfect
+ Reports of poor customer service

Kill points

+ Their prospecting tools and AI support is capitalising on current market trends

Product comparison

	Street	iamproperty
Lead generation	Comprehensive	Comprehensive
Custom workflows and automations	-	Comprehensive
Pre-valuation		
Contracts and engagement	Comprehensive	Comprehensive
Post-instruction		
Onboarding and Compliance	Integrations/Group	Integrations/Group
Digital contracts	Comprehensive	Comprehensive
Property marketing	Comprehensive	Comprehensive
Post sale agreed		
Conveyancing referrals	-	Integrations/Group
Conveyancing updates	Comprehensive	Comprehensive
Financial Preparation	-	Integrations/Group
Moving services	-	-
Lettings		
Pre-tenancy	-	Comprehensive
Lettings management	Comprehensive	Comprehensive
Inspection management	-	Comprehensive
Property management	-	Comprehensive
Client accounting	Comprehensive	Comprehensive

KEY
- Comprehensive Offering
- Integrations or Group Offering

Reapit

Reapit is an Estate Agency Business Platform provider that has been helping residential estate agencies in the UK and Australia for nearly 25 years with a variety of continuously innovative, market-leading products.

Product overview

+ Agency Cloud CRM including Sales and Lettings CRM
+ Property Management
+ Client Accounts
+ Analytics
+ Websites, self serve portals

Pricing

+ Unknown
+ Website builder £1,500/£2,950

Strengths

+ Large number of integrations
+ Large customer base
+ Very well-known brand
+ Comprehensive system for sales and lettings
+ Reporting
+ Cloud version low cost
+ Designed for large Estate Agents

Weaknesses/How we win

+ Legacy system that has not really kept with the times
+ Doesn't have automation
+ Doesn't have a Property Maintenance Task Manager
+ Not a true cloud solution
+ Solution will not work on Mac's only PC's
+ Reports of poor customer service

Kill points

+ Longstanding CRM company with a large reach and agents might be apathetic to change
+ Large number of integrations which will already be established within the agents workflows

Product comparison

	Reapit	iamproperty
Lead generation	Integrations or Group Offering	Comprehensive Offering
Custom workflows and automations	Comprehensive Offering	Comprehensive Offering
Pre-valuation		
Contracts and engagement	Comprehensive Offering	Comprehensive Offering
Post-instruction		
Onboarding and Compliance	Integrations or Group Offering	Integrations or Group Offering
Digital contracts	Integrations or Group Offering	Comprehensive Offering
Property marketing	Integrations or Group Offering	Comprehensive Offering
Post sale agreed		
Conveyancing referrals	–	Integrations or Group Offering
Conveyancing updates	Integrations or Group Offering	Comprehensive Offering
Financial Preparation	–	Integrations or Group Offering
Moving services	Integrations or Group Offering	–
Lettings		
Pre-tenancy	Integrations or Group Offering	Comprehensive Offering
Lettings management	Comprehensive Offering	Comprehensive Offering
Inspection management	Integrations or Group Offering	Comprehensive Offering
Property management	Comprehensive Offering	Comprehensive Offering
Client accounting	Comprehensive Offering	Comprehensive Offering

KEY
- Comprehensive Offering
- Integrations or Group Offering

A cloud-based Sales and Lettings platform with built-in property management and client accounting functionality, Alto powers up your whole business.

Product overview

+ Sales and Lettings CRM, Client Accounting and Property Management
+ Integrations including auctions/AML/ tenancy management etc.
+ Property Marketing and Property Matching
+ Maintenance reporting with client updates
+ Alto Marketplace for integrations

Pricing

+ Unknown

Strengths

+ Cloud based with the backing of a portal
+ Tried and tested accounts solution
+ App market place and building integrations fast inc. AML/Goodlord/ fixflo
+ API Hub for proptech companies
+ Free set up and becoming aggressive on price
+ Easy to navigate

Weaknesses/How we win

+ Alto – Lots of manual processes (agent feedback)
+ Relies on integrations
+ Not mobile friendly
+ Poor customer support
+ No custom automations
+ Rigid system with limited configurations

Kill points

+ Fast pace of integration with third parties to expand its reach/offering
+ The number of API integrations is expanding the capabilities of the CRM quickly

Product comparison

	alto	iamproperty
Lead generation	–	Comprehensive
Custom workflows and automations	–	Comprehensive
Pre-valuation		
Contracts and engagement	Comprehensive	Comprehensive
Post-instruction		
Onboarding and Compliance	Integrations or Group	Integrations or Group
Digital contracts	Comprehensive	Comprehensive
Property marketing	Comprehensive	Comprehensive
Post sale agreed		
Conveyancing referrals	–	Integrations or Group
Conveyancing updates	Comprehensive	Comprehensive
Financial Preparation	–	Comprehensive
Moving services	Limited	–
Lettings		
Pre-tenancy	Integrations or Group	Comprehensive
Lettings management	Comprehensive	Comprehensive
Inspection management	–	Comprehensive
Property management	Comprehensive	Comprehensive
Client accounting	Comprehensive	Comprehensive

KEY
- Comprehensive Offering
- Integrations or Group Offering

- iamproperty CRM
+ iamproperty
+ Proposition
+ Features
+ Pricing
+ Target Audience
+ Competitor Landscape
+ What our Agents Say
+ FAQs
+ Book a Demo
+ Ecosystem Solutions

LOOP

Fully integrated Residential Sales, Lettings and Prospecting. Loop is the only all-in-one property software system in the UK to help residential Estate Agents Source, Secure, Service and Sell more property.

Product overview

+ Intelligent prospecting – Market appraisals
+ Property matching
+ Market intelligence

Pricing

+ Price per user per month
+ Prospecting is on a per postcode basis
+ Monthly/6 month/12 month contracts
+ Onsite training - priced per day
+ Website design - priced per template or bespoke
+ Text messages - priced per message

Strengths

+ Addresses current market challenges with enhanced prospecting tools
+ Market intelligence
+ Low prices
+ 30-day contract
+ Website division

Weaknesses/How we win

+ No Property Management Contract period means they are left open to clients leaving
+ Smaller company with less financial backing

Kill points

+ Their prospecting and market intelligence tools are capitalising on current trends

Product comparison

	LOOP	iamproperty
Lead generation	●	●
Custom workflows and automations	-	●
Pre-valuation		
Contracts and engagement	●	●
Post-instruction		
Onboarding and Compliance	●	●
Digital contracts	●	●
Property marketing	●	●
Post sale agreed		
Conveyancing referrals	-	●
Conveyancing updates	agent only	●
Financial Preparation	-	●
Moving services	-	-
Lettings		
Pre-tenancy	agent only	●
Lettings management	●	●
Inspection management	-	●
Property management	-	●
Client accounting	-	●

KEY
● Comprehensive Offering
● Integrations or Group Offering

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COMING SOON!

Houseful Competitor Analysis

WHAT OUR AGENTS SAY

"iamproperty CRM helps to save us a lot of time and I'm not sure what we would do without their management system, it is the core of everything we do within our lettings business."

Google review

"It's super user-friendly, the support team is super efficient and have configured the system to match what we've needed within reason and it's been a really great help in creating more business for us. It's a massive upgrade from our previous system."

Google review

"iamproperty CRM is designed to help every member of your team make the most of their day with ease. With minimal training needed and everything accessible in one place, you'll wish you moved sooner."

Google review

ACCELERATING AGENT SUCCESS

iamproperty CRM makes our agents lives easier, giving them all the tools they need to accelerate their success. Hear from some of our Partner Agents about how working with iamproperty is helping them to succeed.

"Using iamproperty CRM streamlines the business and keeps processes simple so that staff have more time to be out doing viewings and taking on new properties.

The system covers all the areas we need for our lettings business and the calls to technical support are very helpful. The service is easy for all staff to use and provides one portal for the day-to-day running of our business."

Louise Passfield
Operations Manager
Breckon & Breckon

Read case study

- iamproperty CRM
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- + Competitor Landscape
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- + Ecosystem Solutions

CRM FAQs

(INTERNAL FACING ONLY)

WHY IAMPROPERTY CRM

1. **How will iamproperty CRM improve the agents day-to-day?**

   iamproperty CRM will simplify day-to-day tasks, it will feed the agents property to their required portal, match applicants, give their clients the ability to view sales progression, landlord statements, log maintenance issues, interact with contractors, handle pre-tenancy management with Letzone, keep them compliant with client accounting, provide extensive reporting, produce letters and communications and handle online signing.

   We are unique with our ground-breaking market leading automations module which will handle day-to-day tasks for the agent without them lifting a finger saving them time and money.

2. **Why should the agent change CRM?**

   It's easy to switch! Our CRM helps our agents increase revenue by saving them time. As we make the complex simple, we help our agents stay more motivated and happier in their role. Our CRM simplifies internal processes and streamlines day-to-day processes, giving our agents more time to do what they do best – spend more time with their clients and offering a more professional and modern experience.

3. **What does iamproperty CRM do that the agents current software doesn't?**

   + Our automations are integral to our CRM solution making it market leading.

   + Letzone manages the pre-tenancy process with ease, and as it is integral to the system supplies continuity for tenants from pre-tenancy to property maintenance Apps.

   + Our contractor login streamlines property maintenance and keeps everyone up to date with progress.

   + Our customer support is second to none, and we don't just work off a ticket system, we're right here for our agents supporting them to succeed.

4. **How will the CRM roadmap adapt to changing tech?**

   As with all iamproperty ecosystem services, we don't stay still. We have invested heavily in recent months in added support teams and product enhancements which puts us in a fantastic position. We are an agile team who are always innovating to stay ahead of changing tech. Our open API lends itself to integrations with third-party suppliers, however this will be a targeted approach, for example, expanding our referencing offering, prospecting tools and marketing campaigns.

WHAT'S INCLUDED?

5. **What is included as standard in iamproperty CRM?**

   iamproperty CRM comes with Sales and Lettings CRM as standard. You can then upgrade further to include Property Management and Accounts, and some add on services such as Automations, Letzone and Lettings Legal Letters packs.

6. **What if an agent only wants to take some of the services?**

   Our CRM solution is modular so they can pick what is right for them, so if they only need Sales, Lettings or Property Management then we can adapt the offer for them.

7. **Can our agents use it for auction referrals?**

   This is not possible now; however, this is currently in development.

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8. How can my agent find and track potential vendors?

When an agent enters a vendor into our CRM, they will then be able to run reports on potential vendors and set up mass or individual communications with them by email or SMS.

Agents can also set specific customisable follow up tasks for prospects. These will be available on the 'My Day' dashboard, helping them to keep on top of communications.

We also have future integrations planned with partners who specialise in prospecting and marketing campaigns.

9. Are there target list and integrations for canvassing?

Although this is not available now, we have planned integrations with leading prospecting tools which will allow agents to enhance their prospecting.

10. How easy is it for agents to match buyers to properties?

Matching potential buyers to properties is extremely easy, there are multiple ways, but all are within 2 clicks.

11. Can agents find and track third-party services offered to their clients?

User defined fields can be easily created to track any third-party services. Once set up, these fields can be used to create reports or segment clients and to send mass emails. They can help to manage the third-party services and help ensure that mandatory actions are undertaken when registering new clients, feeding into tasks lists and triggering updates.

Staff Incentives

+ 1-5 branches = £200

+ 6-10 branches = £400

+ 11+ branches = £750

This will be paid once the first month's subscription is paid by the agent.

DEMOS AND COST

12. What incentives do I get for referring an agent for a demo?

There is an incentive fee for every referral that converts to an iamproperty CRM Partner Agent, it is dependent on the size of the agent:

13. How do I request a demo for a current movebutler/iamsold agent?

If you would like to request a CRM demo for an agent email: david.wilton@iamproperty.com

14. Is there a free trial available?

We currently don't offer free trials, although our CRM is intuitive and easy to use, the CRM works best when you have access to the system data. So rather than offering trials, we can run overview or more in-depth demos so the agent can get a full feel of how the system works.

15. How much does iamproperty CRM cost?

The CRM is quoted on a case-by-case, it is typically between £102 to £132 + VAT per user per month depending on requirements. **Prices should not be quoted without qualification from David Wilton:** david.wilton@iamproperty.com

iamproperty CRM is for all Estate Agents of all sizes and requirements. It works for all our agents, with flexible pricing options and add-on modules.
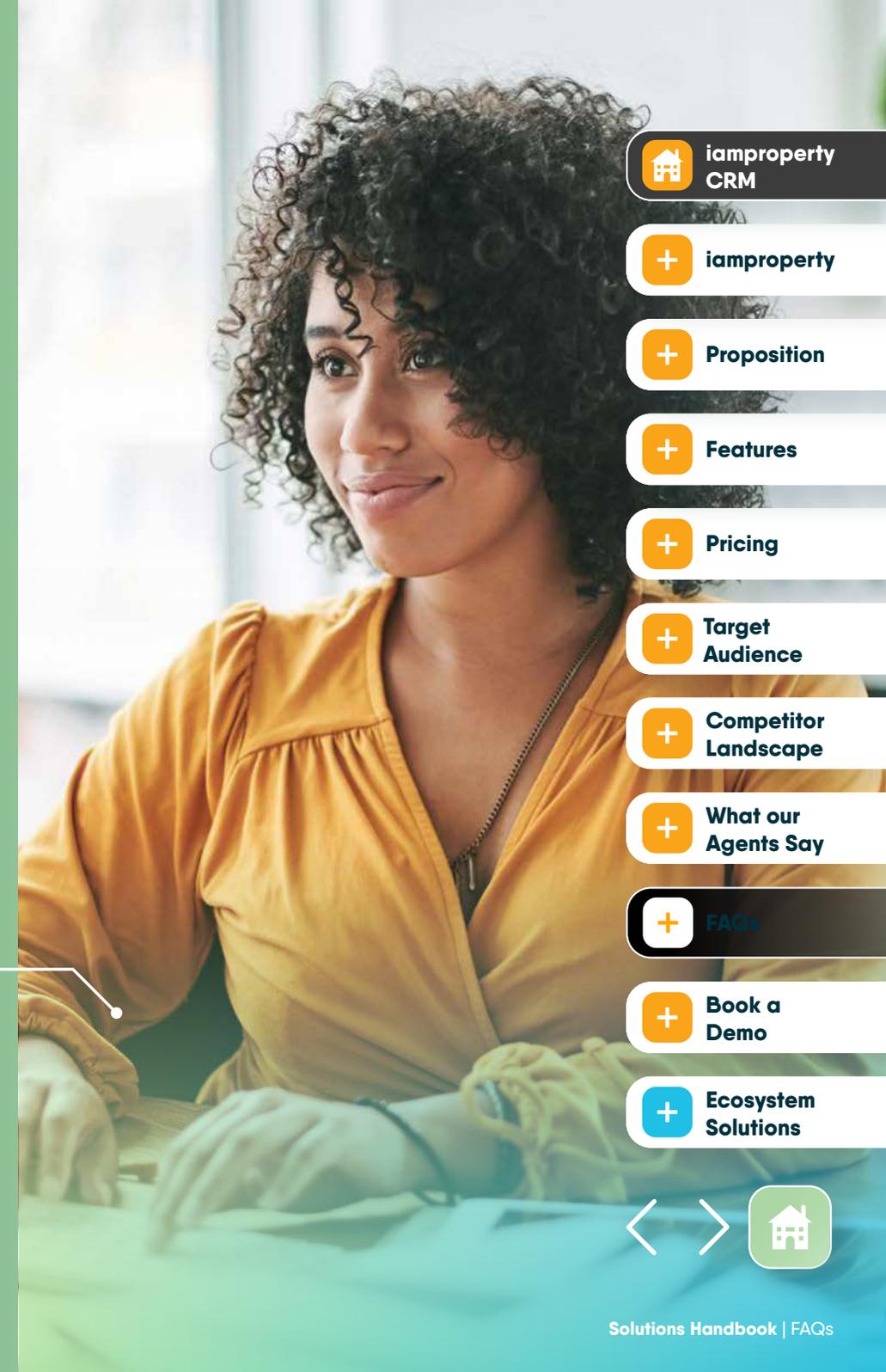
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BOOK A DEMO

We offer a bespoke experience, to our agents starting from a personalised demo.

Our CRM sales consultants will familiarise themselves with your agent's processes to ensure they have a full understanding of their needs and current CRM solution.

IN THE DEMO WE'LL SHOW:

+ Sales progression

+ Lettings and Letzone pre-tenancy module

+ Event and task management

+ Client and contractor portal

+ Digital communications and marketing

+ Automations discussion

+ Client accounting

There is an incentive fee for every referral that converts to an iamproperty CRM which is dependent on the size of the agent:

+ 1-5 branches = £200

+ 6-10 branches = £400

+ 11+ branches = £750

David Wilton
National Sales Manager

To book a CRM demo contact:

david.wilton@iamproperty.com

Prices should not be quoted without qualification from our CRM sales team.

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MOVEBUTLER
END-TO-END ONBOARDING

End-to-end onboarding

iamproperty

Proposition

Features

Pricing

Competitor Landscape

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Ecosystem Solutions

MOVEBUTLER END-TO-END ONBOARDING-HOW WE WIN

Today's market is slow and frustrating, with completion timescales at an all-time high and consumers demanding a better moving experience. movebutler end-to-end onboarding encourages upfront information, faster responses, and easier communication so our agents can build better relationships, delight their clients and make the entire process quicker and more secure.

OUR SOLUTION MESSAGE

GET YOUR CLIENTS MOVING FASTER

End-to-end onboarding helps our agents offer a digital experience that will delight their clients and help their agency stand out. Combining Compliance, Legal Preparation and Surveys it will help agents save time, stay compliant, build revenue and get paid quicker.

SPEED UP THE MOVING PROCESS BY UP TO 4 WEEKS*

movebutler's end-to-end onboarding process speeds up the moving process by up to 4 weeks*, as our agents' clients will get the essential and legal information, they need upfront, so buyers can make those all-important decisions sooner. It all makes for a speedy and secure process for all parties, by reducing transaction times and fall-throughs – meaning our agents get paid quicker.

STAY ONE STEP AHEAD OF COMPLIANCE

movebutler end-to-end onboarding keeps our agents one step ahead of Compliance. Our innovative platform takes care of ID Verification and anti-money laundering Compliance, to ensure our agents have everything they need if they are audited by HMRC – whilst creating an additional revenue stream.

MORE TIME TO DELIGHT YOUR CLIENTS AND BUILD REVENUE

With our brandable solution it's a great way for our agents to present additional services to their clients at the opportune moment without having to chase leads. Whether it's charging for Compliance checks or maximising Referral Fees for Conveyancing, Surveys and Mortgage leads.

SET YOURSELF APART FROM THE COMPETITION

movebutler helps our agents offer a digital personalised experience that will delight their clients, speed up the moving process and help their agency stand out from the competition.

*Based on standard industry vs movebutler managed conveyancers average completion timescales.

REASONS TO BELIEVE

2,023 PARTNER AGENT BRANCHES

As of March 2024.

863 PARTNER AGENT BRANCHES CHARGING FOR COMPLIANCE CHECKS

ONLINE ID VERIFICATION CHECKS DONE IN MINUTES

Partnering with Credas.

227,849 RISK ASSESSMENTS

Completed in the last 12 months.

CLIENTS ARE SUPPORTED BY OUR ONBOARDING SPECIALISTS

For all agents with legal preparation enabled, to help maximise referral revenue.

58,534 CLIENTS DIGITALLY ONBOARDED

In the last 12 months.

HMRC LAND REGISTRY INTEGRATION

For Title Registers and Plans.

REDUCING PRIVATE TREATY TRANSACTION TIMES BY UP TO 4 WEEKS

DESIGNED BY AGENTS FOR AGENTS

Imagine what our agents could do with more hours in the day. With our digital onboarding services, it's like having their own dedicated, expert team working on the admin, freeing up time while delighting their clients with a speedy and efficient service.

We know every business is different, so our flexible modular platform is not a one-size-fits all solution. It configures our agents' clients onboarding journey by branch, all in their own branding, offering a white-label solution to their clients.

With this flexibility, our agents can simply add the features they need to boost their revenue and streamline their administrative processes.

> "
> **"Every Estate agent should have a movebutler. It's like having another member of the team."**

movebutler creates configurable onboarding journeys

Automatic Title Review	Digital Risk Assessment	Identity Verification	Method of Sale Audit*	Legal Preparation
Upfront Material Information	Conveyancing Comparison	Property Surveys	Financial Preparation	New Services Coming Soon

*In line with the TPO guidance. For iamsold Partner Agents.

- End-to-end onboarding
- + iamproperty
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HOW IT WORKS

Agent process

Client process

movebutler process

Compliance Module

Client Onboarding

Title Check & Insight Report

Digital onboarding

...or continue in-platform

Risk Assessment

Client selects a Conveyancer

Legal Preparation Module

Method of Sale Audit

ID Verification

Additional services such as Surveys offered as part of the journey

Vendor completes Material Information Forms

TA6 created/ Searches ordered and all sent to your Conveyancer with title register documents

You manage the relationship with Agent Managed Conveyancer

We manage the relationship with movebutler managed Conveyancers

End-to-end onboarding

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STAY ONE STEP AHEAD OF COMPLIANCE

Our end-to-end onboarding keeps our agents one step ahead of compliance. Our innovative solution takes care of ID Verification and anti-money laundering compliance, to ensure our agents have everything they need if they are audited by HMRC – whilst creating an additional revenue stream.

▶ **Watch Charging for ID Verification Video**

£

INCREASE REVENUE

Our agents can turn compliance from a cost burden into a monthly revenue opportunity by charging their clients for compliance checks whilst setting their own prices.

View ROI Calculator

Automatic Title Review

Our integration with HM Land Registry, means our agents can download Title Registers and Plans allowing them to identify all parties associated with the sale and identify any early issues upfront whilst having a full audit trail.

Digital Risk Assessments

Our agents will get instant results and guidance from our online AML Risk Assessments. Their clients complete all their Risk Assessment and ID Checks online.

ID Verification and AML Checks

Our robust checks with PEP, Sanctions and Biometric Identity Verification help identify any high-risk clients which are immediately flagged to their Money Laundering Officer (MLO).

TPO Code of Conduct

A super easy way for our agents to capture their clients' moving preferences which demonstrates they are working within TPO guidelines. Our Method of Sale Audit survey quickly and easily checks client's moving priorities and helps them ensure they are being onboarded for the right service.

If they use our auction services, it can help drive additional auction sales on slow moving properties.

AML Training and Support

Our end-to-end onboarding educational resources keep our agents fully compliant and fulfil their AML training requirements. Certification is available on an annual basis, so everyone is up to speed with the latest legislation.
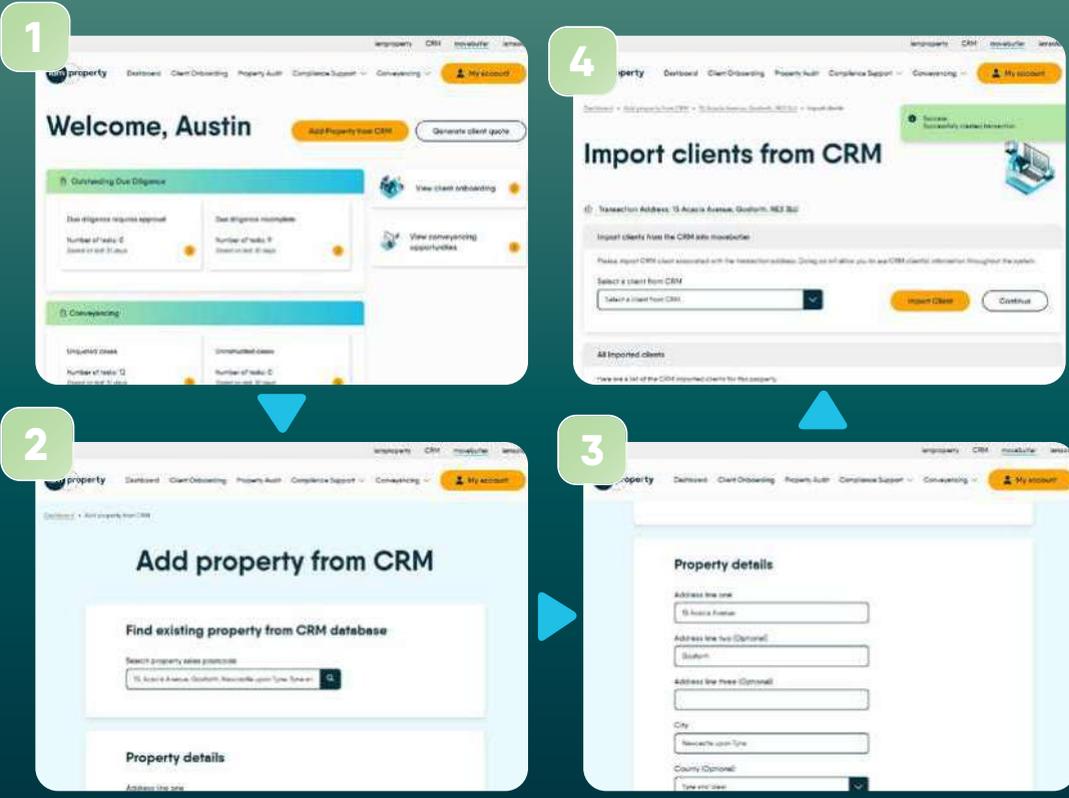
CONNECTING IAMPROPERTY CRM TO MOVEBUTLER

Reduced double entry and movebutler compliance indicators directly in iamproperty CRM

1 Welcome, Austin

2 Add property from CRM

3 Property details

4 Import clients from CRM

5 Import clients from CRM

6 Import clients from CRM

Compliance verified — Medium risk

Sarah Lane
1 Lake Court, Gosforth, Newcastle upon Tyne, NE3 3PE
sarah.lane@outlook.com
07261748390

Compliance incomplete
Lilly Smith
12 Peach Avenue, Ponteland, Northumberland, NE15 8RU
lilly.smith-1@outlook.com
07537682947

Compliance verified — Low risk
James Brown
58 Oak Road, Gosforth, Newcastle upon Tyne, NE3 6TY
james.brown-1@outlook.com
07655627483

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UPFRONT MATERIAL INFORMATION

Providing more Material Information upfront, speeds up the process and gives our agents more time to focus on what they do best.

Our Enhanced Property Information Questionnaire (Enhanced PIQ) covers everything needed as part of NTSELAT's guidance. As well as helping our agents digitise and speed up the entire PIQ process making it easier to share with potential buyers. To provide extra support, our team of Onboarding Specialists are also available to support their clients – reducing the admin burden to our agents.

Our Title Insight Report also provides guidance and advice on how they can approach any unforeseen issues with their client or their conveyancer, as early as possible.

With Material Information provided upfront our agents can:

+ Increase pipeline turn

+ Reduce time spent on sales progression

+ Make their clients more sticky to their agency services

+ Reduce fall throughs

▶ **Watch our Material Information webinar**

Support clients with the Marketing Toolkit Property Reports.

These reports not only demonstrate agents market knowledge, they also cover a lot of the upfront material information requirements. Giving clients a head start on their material information requirements.

End-to-end onboarding

iamproperty

Proposition

Features

Pricing

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SUPPORTING OUR AGENTS ON MATERIAL INFORMATION

KEY Recommendations

Vendors should appoint a conveyancer at the point of marketing. Buyers should appoint a conveyancer before placing an offer. As much information should be collated as soon as possible, so the buyer can make an informed decision.

✓ Material facts part of the journey

✓ Insight report as standard

GUIDANCE — Part A & B

Asking price
Tenure*
Property type
Number and types of room

movebutler solution:

+ Enhanced PIQ – Property Details, tenure and charges.

+ Title insight report

GUIDANCE — Part A & B

Council Tax / Rates
Property construction
Building safety

movebutler solution:

+ Enhanced PIQ – Construction, energy efficiency and council tax

GUIDANCE — Part A & B

Electric supply
Water supply sewerage
Heating
Broadband
Mobile signal/coverage

movebutler solution:

+ Enhanced PIQ – Utilities and services

GUIDANCE — Part B & C

Parking
Accessibility/adaptations

movebutler solution:

+ Parking arrangements and accessibility

GUIDANCE — Part C

Rights and easements
Flood risk coastal erosion risk
Coalfield or mining area

movebutler solution:

+ Enhanced PIQ – Additional PIQ information

GUIDANCE — Part C

Restrictions

movebutler solution:

+ Enhanced PIQ – Listing and Conservation Title insight report

GUIDANCE — Part C

Planning permission

movebutler solution:

+ Enhanced PIQ – Alterations and changes to the property, Notices that affect the property

MATERIAL INFORMATION SOLUTION

**1** **Pre-populated Material Information forms**

Keeping agents ahead of the latest legislation with an enhancement designed to take the stress and hassle out of Material Information. Aligning with NTSELAT's guidance, this feature offers you and your clients pre-populated forms with Material Information and easily shareable Property Report links, giving you much-needed time back and delighting your clients.

2 **Benefit further with the Marketing Toolkit**

Agents also using our complimentary Marketing Toolkit solution will benefit from fully branded versions of the Property Report. These reports not only demonstrate agents market knowledge, they also contain a lot of the required upfront material information; giving clients a head start and making the process much faster.

3 **Legal Preparation**

Benefit more with our Legal Preparation module, as movebutler automatically maps completed Material Property Information into TA forms; removing duplication for your vendors and helping speed up transaction times even further, when this module is enabled.
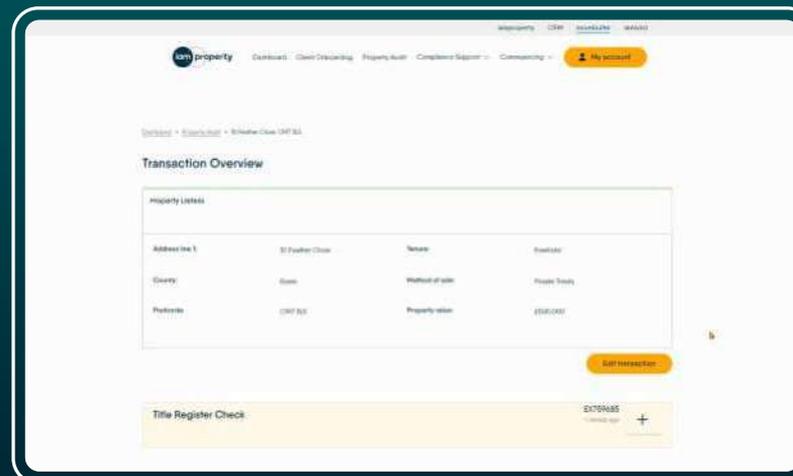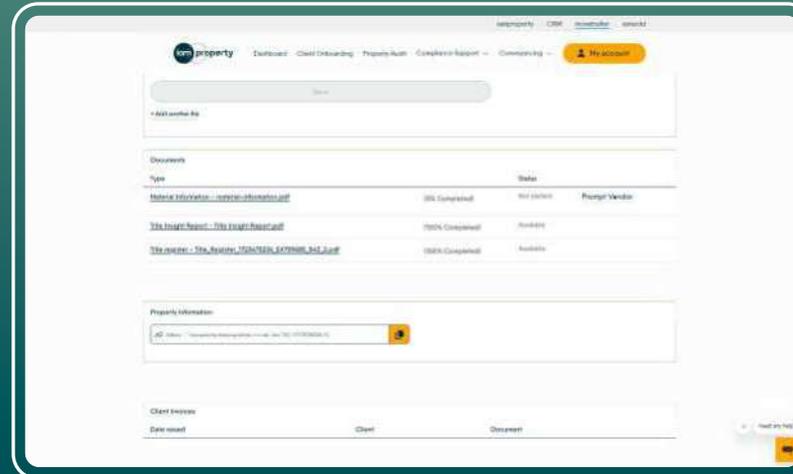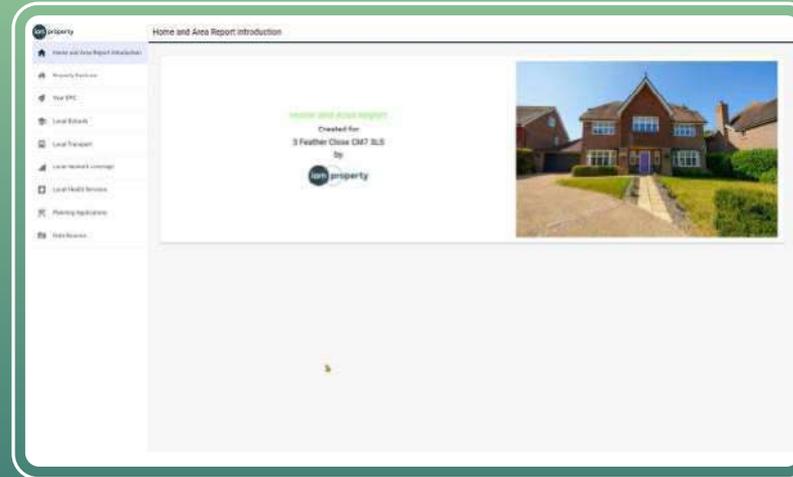
End-to-end onboarding

+ iamproperty

+ Proposition

+ Features

+ Pricing

+ Competitor Landscape

+ What our Agents Say

+ FAQs

+ Book a Demo

+ Ecosystem Solutions

DELIGHT YOUR CLIENTS

Our end-to-end digital onboarding platform encourages upfront information, faster responses, and easier communication so our agents can build better relationships and delight their clients.

Our agents clients will have access to the Client Portal, no matter if they started the process in branch or remote onboarding.

+ The Client Portal shows all the to-do-tasks and what actions are still outstanding. No more chasing updates for our agents by phone or email, as automated notifications keeps the onboarding journey moving for all parties.

+ As part of the onboarding process, if our agents have services enabled such as client charging for compliance or our Method of Sale Audit, their clients will be able to complete payment and provide sale preferences.

+ Our brandable Client Portal is a great way to present additional services to their clients at the opportune moment without them having to chase the leads. Whether it's charging for compliance checks, or getting referrals for Conveyancing or Surveys.

▶ **Client Portal Update**

*Based on standard industry vs movebutler managed conveyancers average completion timescales.

End-to-end onboarding

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LEGAL PREPARATION

With movebutler end-to-end onboarding, Legal Preparation is encouraged upfront, so any unforeseen issues are addressed earlier in the process, helping our agents clients make informed decisions quicker. It all makes for a speedy and more secure sales process, giving our agents the tools to delight their clients and getting them sale-ready faster.

+ Solicitors get a head start on instruction documents, receiving Title Register, Title Insight Report, and Material Information forms upfront. If they chose a movebutler Conveyancing, they'll be working to a managed SLA.

+ Conveyancers get standard searches ordered four weeks sooner than the normal process to keep things moving, if they use movebutler. If the purchase falls through, they'll benefit from our Search Guarantee, where movebutler re-supplies the searches for free.

+ Buyers get more property information upfront, from the Title Insight Report and Enhanced PIQ which covers Material Information requirements, to reduce sales timescales and help them make informed decisions earlier in the process.

GET YOUR CLIENTS EXCHANGE READY WITH PREMIUM CONVEYANCING

Conveyancing is the perfect addition to the Legal Preparation Module, putting you and your clients in control; with upfront material information and a complete conveyancing service.

Speed up transactions by up to 5 weeks and get paid quicker with exchange ready clients. Faster transaction times with less admin, less duplication, and with Searches, Material Information and Conveyancing included.

Part of our movebutler Legal Preparation Module, our Premium Conveyancing service does the hard work, so you can focus on your client and sale success. Wow your clients by addressing queries earlier in the process, keeping all parties up to date and everything on track.

Don't fear the fall through, save wasted time and expenses with more motivated sellers and informed buyers who are committed to the sale.

WHAT'S IN THE PREMIUM CONVEYANCING PACK?

+ **Vendor identity and Risk Assessment**
+ **Full Evidence of Title**
+ **Title Insight report**
+ **Full Vendor disclosure (TA6/TA7/TA10)**
+ **Standard Enquiries raised and addressed**
+ **Draft Contract**
+ **Search refresh guarantee**
+ **Search Pack to include:**
  - Regulated LA search
  - Regulated Water & Drainage
  - Environmental
  - Climate Change
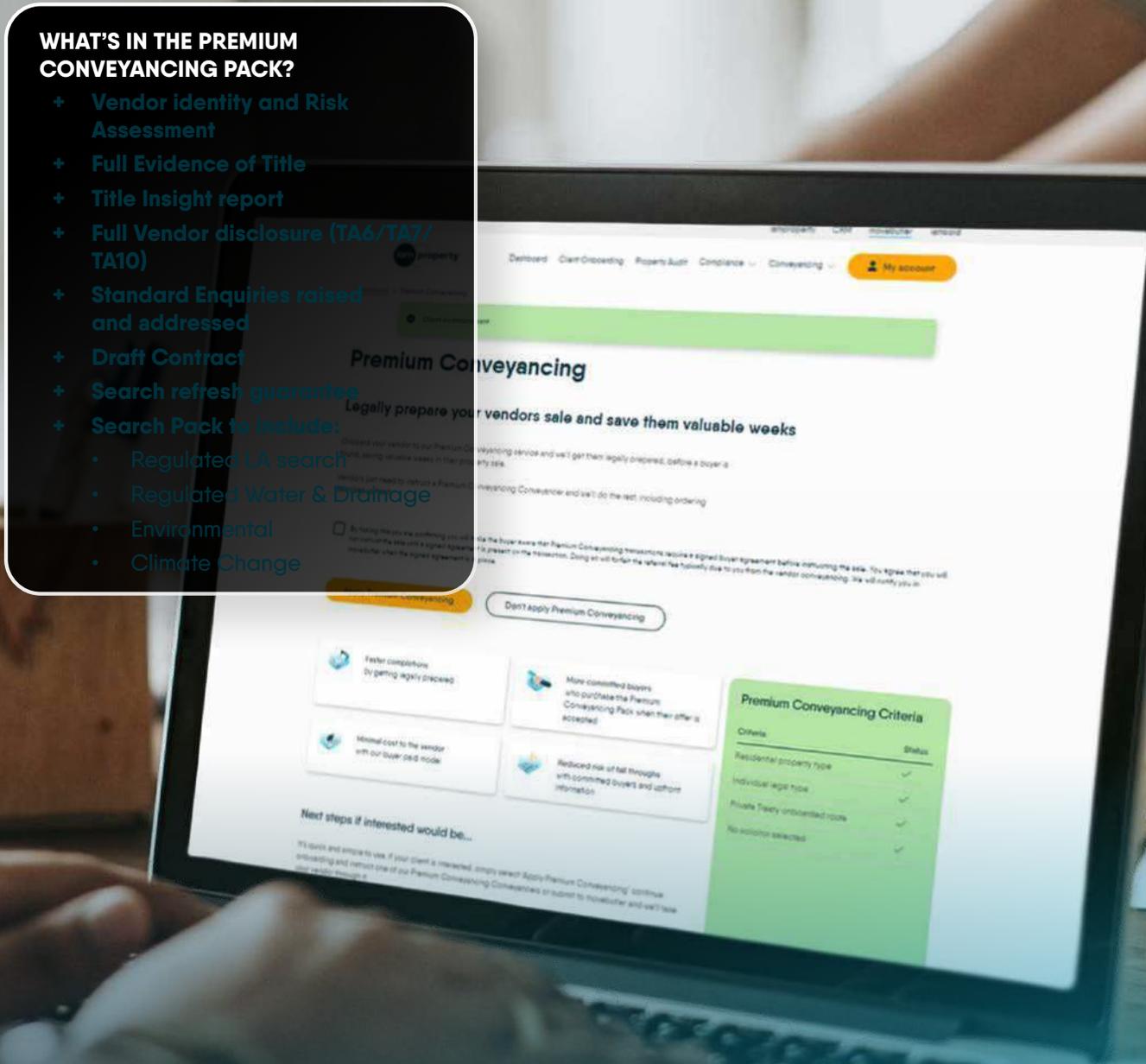
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CONVEYANCING MADE EASY

movebutler end-to-end onboarding offers our agents the flexibility to maintain existing Conveyancing relationships as well as offering more choice to their clients.

With the client dashboard our agents can present their clients with all Conveyancing options, so no opportunity is missed.

Our agents can offer their existing Conveyancers on a referral-only basis, or our fully managed panel, or a mix of the two. They choose what works best for them and their clients and can customise the panel to compliment their current processes

Adding movebutler Manged Conveyancers to their panel gives them these additional benefits:

+ Key milestone updates online 24/7
+ Search guarantee
+ An experienced panel management team
+ No sale no legal fee
+ Fast search turnaround time
+ Pipeline turn of a minimum of 25%
+ MOS to completion 95 day
+ Premium Conveyancing Pack

NEVER MISS AN OPPORTUNITY

Our agents can set their own Conveyancing Referral Fees and generate more revenue.

Key features at a glance...

Key features	movebutler Managed Conveyancers	Agent Managed Conveyancers	Premium Conveyancing
Free Title checks & Title insight report	✓	✓	✓
Free Enhanced PIQ	✓	✓	✓
Encouraging early legal preparation from clients	✓	✓	✓
Comparison quotes provided to clients	✓	✓	✓
Reduced progression times (searches ordered on instruction)	✓	✓	✓
Onboarding Specialist support to boost conversions	✓	✓	✓
movebutler managed referral fees	✓		✓
Full referral fee managed by you		✓	
Add any Conveyancer	With SLAs	✓	✓
Milestone updates by the Conveyancer	✓		✓
In-platform milestone updates for clients	✓		✓
Conveyancer management and SLAs	✓		✓
Conveyancing service update support	✓		✓
Searches ordered upfront			✓
Standard enquiries raised and addressed upfront			✓
Reduced fall-through rate			✓

SPEED UP CONVEYANCING WITH EARLIER SURVEYS

Encourage our agents to offer Surveys sooner in the process and generate additional revenue.

Early Surveys speed up the process by allowing buyers and sellers to deal with any issues that arise sooner before they get a chance to hold up the sale.

+ movebutler offers UK-wide coverage from over 330 RICS-qualified Chartered Surveyors.

+ Our agents can offer their clients an enhanced, transparent and jargon-free journey, with all the tools they need to get moving quicker.

+ In-platform appointment requests and milestone tracking comes in their client dashboard, so they can see their progress and keep track of outstanding tasks.

+ Agents can expand their client services and generate additional revenue from the Referral Fees on all completed Surveys.

SOLD

GENERATE REVENUE ON ALL COMPLETED SURVEYS

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AUCTION REFERRALS WITH METHOD OF SALE AUDIT

During the movebutler end-to-end onboarding process, vendors complete a quick circumstance checker which is designed to reduce withdrawals and increase sellers awareness of all methods of sale.
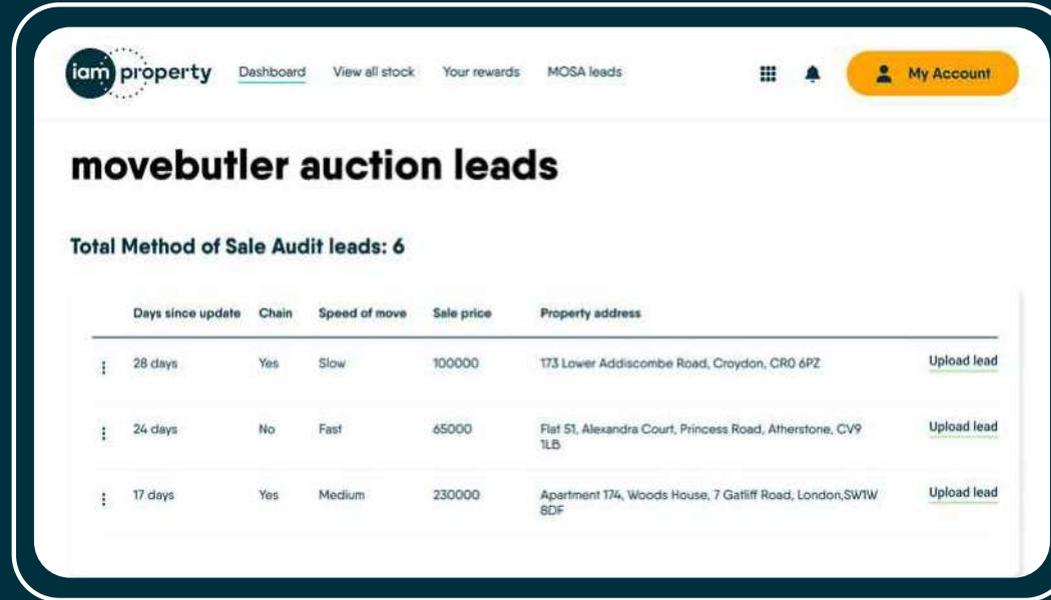
Where a vendor's circumstances may lend themselves to consideration of auction, they can proactively request a call back to find out more, if they haven't sold within 30 days; generating potential future leads for the auction service.

All leads generated through MOSA will be accessible directly from an agents auction dashboard.

Key MOSA benefits:

Put your clients' circumstances front and centre

Generates more auction referrals

Ensures compliance, demonstrating TPO Code of Conduct

Here's a quick overview of the process

iam property | Dashboard | View all stock | Your rewards | MOSA leads | My Account

movebutler auction leads

Total Method of Sale Audit leads: 6

	Days since update	Chain	Speed of move	Sale price	Property address	
	28 days	Yes	Slow	100000	173 Lower Addiscombe Road, Croydon, CR0 6PZ	Upload lead
	24 days	No	Fast	65000	Flat 51, Alexandra Court, Princess Road, Atherstone, CV9 1LB	Upload lead
	17 days	Yes	Medium	230000	Apartment 174, Woods House, 7 Gatliff Road, London, SW1W 8DF	Upload lead

If Auction is suitable, the option to request a call back about MMoA is presented if the vendor has not sold within 30 days.

This request will appear on your auction dashboard under the MOSA tab.

An Auction Specialist will call you after 37 days to discuss and agree the right approach for your vendor call back.

We will then call the vendor to discuss their options.

BOOST PARTNER AGENTS REVENUE

ID Verification charging

Many of our agents, are already choosing to charge their clients for ID Verification. Bringing in on average, an additional £20 per client ID Verification. Turning Compliance from a cost burden into a revenue opportunity.*

Conveyancing Referral Fees

Maximise our agents Conveyancing Referral income from both their local Conveyancers or our fully managed Conveyancers with the client dashboard. Conveyancers are presented to every onboarded client, meaning our agents never miss an opportunity to quote.

Survey Referral Fees

Our agents will receive additional Referral Fees when their buyers complete a Survey offered through movebutler end-to-end onboarding.

Mortgage advice call back requests

Introduce the Financial Preparation module to encourage agents to book more Financial Advisor appointments. As this will allow agents to add a call back option to schedule mortgage appointments during the onboarding journey.

*Bundle savings do not apply to client charged Identity Verification.

How it works:

For all agents who offer our Compliance and Legal Preparation modules, our Onboarding Specialists are on hand to help them maximise service uptake. We offer a welcome call to all clients, giving them advice on the onboarding process, and additional follow-ups to encourage uptake of services, ensuring our agents get the most out of every opportunity.

1 Our agents can choose to charge their clients for Compliance checks*, or offer as a value-add service.

2a If agents are charging clients, they pay a fixed rate for the checks, and then any margin will come straight back to them.

2b If agents offer as a free service to clients, it works on a credit system with bundle offers, meaning the more they buy the more they save.

3 Conveyancing Referral Fees are set by the agent.

4 Enable the Financial Verification module to add a call back option to their Mortgage advisers, and generate more referrals.

5 Enable Survey Module to get addition Referral Fees.

Bundles	Cost	Credits	Effective rate for Biometric
1	£50	162	£4.63
2	£100	337	£4.45
3	£200	729	£4.12
4	£300	1112	£4.05
5	£500	1983	£3.78
6	£1,000	4441	£3.38
7	£1,500	6895	£3.26
8	£2,500	12256	£3.06
9	£4,000	20810	£2.88
10	£5,000	33796	£2.22

*Agent pays £4.92 (inc. VAT) per ID Verification and can set their own client charge, typically £20 inc VAT.

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COMPETITOR LANDSCAPE

SALES METHODS
(PRIVATE TREATY)
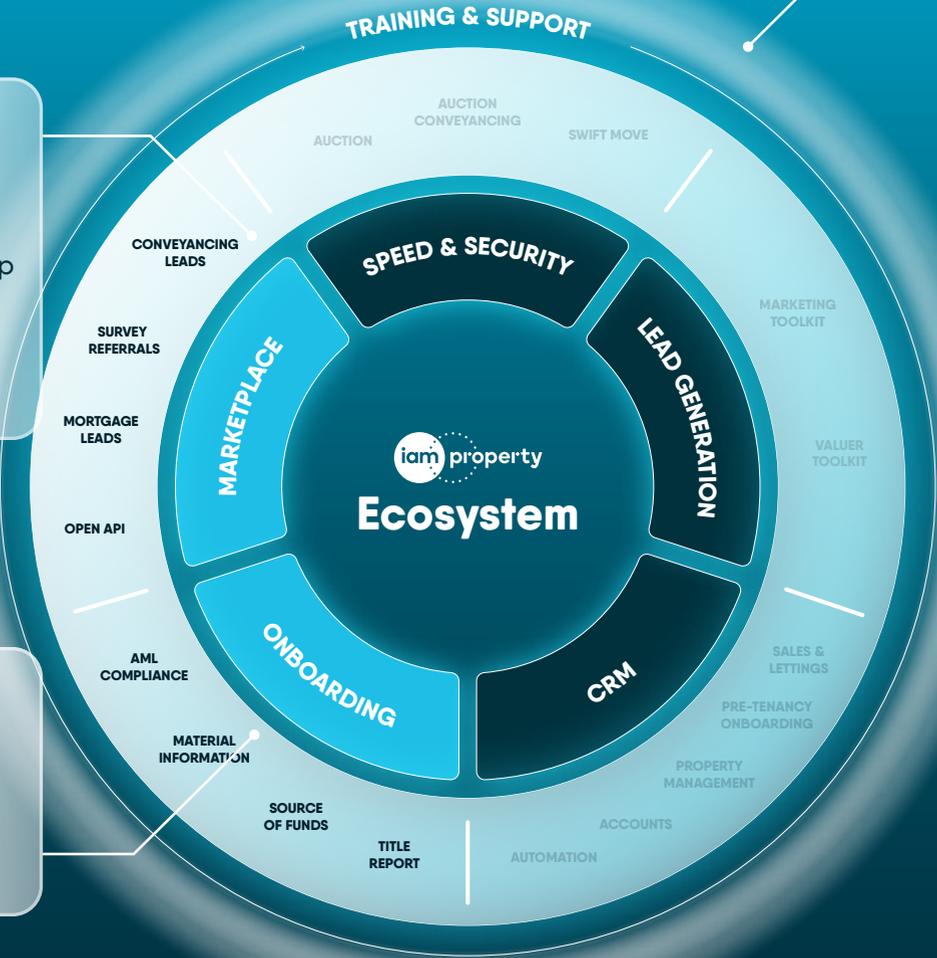- Landmark
- Hive
- A.v.rillo

POST SALE AGREED
- Sortmove
- Breezemove
- Lifetimelegal
- Reallymoving
- Yourkeys
- Movewithus
- Myhomemove
- Movinhub
- HIVEMinerva
- Mio
- weComplete
- Perfect partnership
- GOTO group
- Just move in

POST SALE INSTRUCTION
- Landmark
- Thirdfort
- Smartsearch
- Credas
- Credit safe
- Smoove
- Acaboom,
- 360 viewings,
- FocalAgent,
- HIVE

iam property Ecosystem

- TRAINING & SUPPORT
- AUCTION CONVEYANCING
- AUCTION
- SWIFT MOVE
- CONVEYANCING LEADS
- SURVEY REFERRALS
- MORTGAGE LEADS
- OPEN API
- AML COMPLIANCE
- MATERIAL INFORMATION
- SOURCE OF FUNDS
- TITLE REPORT
- AUTOMATION
- ACCOUNTS
- PROPERTY MANAGEMENT
- PRE-TENANCY ONBOARDING
- SALES & LETTINGS
- VALUER TOOLKIT
- MARKETING TOOLKIT
- SPEED & SECURITY
- MARKETPLACE
- LEAD GENERATION
- ONBOARDING
- CRM

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MOVEBUTLER KEY COMPETITORS

KEY

🟩 Comprehensive Offering
🟥 Limited Offering

	movebutler	Landmark Agent	Minerva	Hive	Avrillo	Coadjute*	Aplyid	Veriphy
Primary Focus	End to end onboarding	Compliance	Onboarding for Conveyancers	Sale-Ready Packs	Sale-Ready Packs	Conveyancing blockchain	Compliance	Compliance
Client-facing digital onboarding journeys & dashboard	🟩	🟩	🟩	–	–	🟩	🟩	–
Integrated Risk Assessment Tool	🟩	–	–	🟩	–	–	–	🟩
Due Diligence completion guidance	🟩	–	–	–	–	–	–	–
Online Identification Checks	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟩
Evidenced Audit trail	🟩	🟩	🟩	–	–	🟩	–	–
Title Registers and Title Plans directly from Land Registry	🟩	Ownership checks only	Unknown	🟩	Supplied	🟩	–	🟩
Title insight reports	🟩	–	–	Alerts	🟩	🟩	–	–
Free Title Register download and insights report on all transactions*	🟩	🟩	Unknown	🟩	🟩	🟩	–	🟩
AML Verification	🟩	🟩	🟩	Outsourced	🟩	🟩	🟩	🟩
Sanction & PEP compliance	🟩	🟩	🟩	Outsourced	🟩	🟩	🟩	🟩
Free AML Training Content	🟩	🟩	–	–	–	–	🟩	🟩

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MOVEBUTLER KEY COMPETITORS

KEY
- 🟢 Comprehensive Offering
- 🔴 Limited Offering

	Thirdfort	Creditsafe	Credas	Smartsearch	Simplify	hipla	kotini	simply conveyancing	Smart Compliance	Veya
Primary Focus	Compliance	Compliance	Compliance	Compliance	Sale-Ready Packs	Sale-Ready Packs	Sale-Ready Packs	Sale-Ready Packs		
Client-facing digital onboarding journeys & dashboard	app	🟢	🟢	-	🟢	🟢	🟢	🟢	🟢	🟢
Integrated Risk Assessment Tool	-	-	🟢	-	🟢	🟢	🟢	-	🟢	🟢
Due Diligence completion guidance	-	-	🟢	🟢	-	🟢	-	-	🟢	🟢
Online Identification Checks	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
Evidenced Audit trail	🟢	🟢	🟢	🟢	-	-	🟢	-	🟢	🟢
Title Registers and Title Plans directly from Land Registry	-	Ownership checks only	Ownership checks only	-	🟢	🟢	🟢	🟢		🟢
Title insight reports	-	-	-	-	🟢	-	-	-		🟢
Free Title Register download and insights report on all transactions*	-	-	-	-	-	-	-	-		🟢
AML Verification	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
Sanction & PEP compliance	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢	🟢
Free AML Training Content	-	🟢	-	🟢	-	-	-	-	🟢	🟢

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MOVEBUTLER KEY COMPETITORS

KEY
- 🟩 Comprehensive Offering
- 🟥 Limited Offering

(🟩 = Comprehensive Offering marker)

	movebutler	Landmark Agent	Minerva	Hive	Avrillo	Coadjute*	Aplyid	Veriphy
Primary Focus	End to end onboarding	Compliance	Onboarding for Conveyancers	Sale-Ready Packs	Sale-Ready Packs	Conveyancing blockchain	Compliance	Compliance
Automatic MLO Alerts on high-risk cases	🟩	Managed	–	–	–	–	–	–
Upfront material information/Integrated PIQ	🟩	–	🟩	🟩	🟩	🟩	–	–
Conveyancing panel	🟩	–	Conveyancer run	🟩	🟩	🟩	–	–
Conveyancing packs upfront	🟩	🟩	Conveyancer run	🟩	🟩	🟩	–	–
Searches ordered on sale agreed	🟩	🟩	–	🟩	🟩	–	–	–
Searches ordered on instruction	🟩	–	–	–	–	🟩	–	–
Surveys	🟩	–	–	–	–	–	–	–
Financial Prospecting tool	🟩	–	–	–	–	–	–	🟩
Proof/Source of fund checks	–	–	🟩	–	–	–	–	🟩
Mortage panel	–	–	–	–	–	–	–	–
Property Reports	Groups	–	–	🟩	–	🟩	–	–

MOVEBUTLER KEY COMPETITORS

KEY
- ✓ Comprehensive Offering
- ✗ Limited Offering

	Thirdfort	Creditsafe	Credas	Smartsearch	Simplify	hipla	kotini	simply conveyancing	smart compliance	Veya
Primary Focus	Compliance	Compliance	Compliance	Compliance	Sale-Ready Packs	Sale-Ready Packs	Sale-Ready Packs	Sale-Ready Packs		
Automatic MLO Alerts on high-risk cases	-	✓	✓	-	-	-	-	-		✓
Upfront material information/Integrated PIQ	-	-	✓	-	-	✓	✓	✓	✓	✓
Conveyancing panel	-	-	✓	✓	✓	✓	-	-		
Conveyancing packs upfront	-	✓	✓	✓	✓	-	✓	-		
Searches ordered on sale agreed	-	✓	✓	✓	✓	-	✓	-		
Searches ordered on instruction	-	Ownership checks only	Ownership checks only	-	-	-	-	✓		
Surveys	-	-	-	-	✓	-	-	-		
Financial Prospecting tool	-	-	-	-	-	-	-	-		
Proof/Source of fund checks	✓	✓	✓	✓	-	-	-	-		
Mortage panel	-	✓	✓	✓	-	-	-	-		
Property Reports	-	✓	-	✓	✓	✓	-	-		✓

MOVEBUTLER KEY COMPETITORS

	Strengths	Weaknesses	Threat to us
SmartSearch	+ Comprehensive AML verification software + Award-winning software + App for on-the-move/easier AML checks + Customer search data held on Smartsearch for monitoring + World wide sanctions list	+ No client journey and remote AML/ID check options (only through agent-managed App) + No additional services offered such as, Title Insight information, PIQ, Conveyancing etc. + No client charging options	+ Scalable platform for agents, which covers the KYC and CDD needs
Landmark Agent	+ Offering fully managed Compliance service + Modular system customisable to the agent/ service provider + Strong claims - Claims 95%+ pass rate first time and over 80% of refer and warning cases completed in 2 days + Panel management services backed up by Landmark data	+ Potentially the leadership – with bad Glassdoor/Indeed reviews from staff members + No Risk Assessment tool and pre-check due diligence	+ Offers additional services outside of compliance including get clients contract-ready earlier in the process
Credas	+ Possible to integrate Credas in to CRM/internal systems + Biometric facial recognition technology + Remote ID checks + Leading software solution for AML and KYC checks	+ Link access only to ID Verification – Only part of the process and doesn't offer client-facing solutions other than ID checks	+ Leading solution for AML and KYC checks with remote ID check options and integration with CRM
Creditsafe	+ Open API for CRMS, Salesforce and Sage already created + System can be used by web link, built into your existing App or as portal access for staff to use	+ As standard link access only to ID Verification – Only part of the process and doesn't offer client-facing solutions other than ID checks	+ Addition of the Bank Data Verification on top of standard ID Verification, PEP and Sanctions checks
thirdfort	+ Chases completions + Included source of funds and proof of funds checks	+ Clients have to download an App to use + Tied into annual contracts with Pro version + Proof of ownership has to be uploaded by the client using specific documents/original letters which may not be as easy to get + No add-on services or chances to monetise the process	+ Covers source and proof of funds checks as well as AML with support from Thirdfort to chase completions +Got a secure link that can be used for sharing with multiple agencies

MOVEBUTLER KEY COMPETITORS

	Strengths	Weaknesses	Threat to us
Minerva	+ Uses Credas for ID and AML, PEP and Sanctions checks + Designed for Conveyancers so has ready-made list of conveyancers using the platform + Data shared between Conveyancer and agent so there is only one view of the information	+ Additional services and revenue opportunities + Risk Assessments and due diligence + movebutlers supporting service uptake	+ Conveyancer gets the client ready upfront saving time when the buyer is found
HIVE	+ Full service to get client legally prepared. + Includes Property Reports for buyers + Searches ordered on offer agreed + Pack includes media tours and photos	+ Searches ordered in line with standard movebutler transactions, no fast-track + PIQ stand alone, no mention of protocol forms	+ Additional information in the buyer pack with media tours and photos, offers additional referrals which they could expand on
Veriphy	+ Instant customer verifications + 91% approval rate on all Compliance checks + Flexible Compliance + API web service	+ FREE AML Training content + Automatic MLO Alerts on high risk cases + A full journey including add-on services	+ Open banking Proof of Funds checks

A.v.rillo	+ Control and speed up Conveyancing
	+ Search Guarantee
	+ Indemnity Insurance
	+ Sale ready packs with easy to understand client scoring linked to Conveyancing offering
		+ Only offer the Conveyancing piece, no additional services
		+ Reviews seem to show:
		  • A similar problem to the industry standard, the portal is only as good as the conveyancer updating it
		  • Possibly rely too much on the portal for communication so loses the human touch
			+ Sale ready pack from a conveyancer offering the full service with insurance

Aplyid	+ Good branding, looks different to most + Wider AU NZ business	+ A reputable and trustworthy brand + Offer AML and ID and do not include any additional services/support	+ Full property information pack for buyers as well as covering all the onboarding process

- End-to-end onboarding
- + iamproperty
- + Proposition
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- + Pricing
- + Competitor Landscape
- + What our Agents Say
- + FAQs
- + Book a Demo
- + Ecosystem Solutions

MOVEBUTLER KEY COMPETITORS

	Strengths	Weaknesses	Threat to us
Coadjute	+ Secure messaging and digital ID transfer + One view for all parties + Can be used from within their current system. + Branded and autogenerated Material Information packs + Pre-populate BASPI and TA6 forms with real time updates + Secure blockchain data sharing for TA6 forms	+ Only as good as the people updating it + Limited to Conveyancers and CRMs signed up to the system. We can add any conveyancer. + Support for conveyancing conversions. + No risk assessment	+ Secure messaging, document and money transfer. + Material information auto-population and report branding + Digital TA smart forms
Simplify	+ IPX customer engagement software, real-time market overviews + Onsite conveyancers, conveyancing portal + Bespoke panel make-up to reflect catchment area + Training + National incentive schemes + Free iPads with preloaded software for each site	+ Security, huge data hack in 2023 and 2021 + No additional services and revenue opportunities	+ IXP real-time market analysis software + Re-Trwal market listing tracker
hipla	+ Supported by HM Land Registry and Mishcon De Reya + Saves 3-4 weeks of delays in the early stage of the conveyancing process + Choose who is on the conveyancing panel + Upfront legal packs	+ No additional services and revenue opportunities + No end-to-end transaction management + No search ordering services	+ Digital legal packs with upfront material information

MOVEBUTLER KEY COMPETITORS

	Strengths	Weaknesses	Threat to us
kotini	+ Secure messaging and digital ID transfer + One view for all parties + Can be used from within their current system + Branded and autogenerated Material Information packs + Pre-populate material Information info property forms + Integration with Rex, Federation of Independent Agents, Propertymark, and Gazeal	+ No additional services and revenue opportunities	+ Prepopulated Material Information and branded legal packs + Integrated CRM (Rex)
s cveyancing	+ Manage your case 24/7, via eConvey + Online payments + Online ID checks + Real-time updates and case tracking	+ No additional services and revenue opportunities + No risk assessment	+ Highly specialised conveyancing services, team, and accreditations
smart compliance	+ Complimentary 3-month Lifetime Legal Membership to all compliance clients; including standard or mirror Will, unlimited legal advice, discounts on over 250 high street & global brands. mover protection + Street and Reapit integration + Partners with Kotini	+ No end-to-end onboarding journey. Doesn't include Title Register, insights, Conveyancing, Surveys, Searches. Sole focus on AML	+ Integrations with CRMs (Reapit, Street) + In-depth, configurable risk assessments + More granular audit trails for each check + Real-time AML risk dashboards + Additional client benefits post-service
Veya	+ Title deed analysis & risk scoring + Automated risk flagging for ownership and legal issues + White labelled reports	+ Not a full conveyancing services offering. Doesn't include Title Register, insights, Conveyancing, Surveys, Searches + No additional revenue opportunities	+ nstant title risk scoring and comprehensive analysis + Instant Land Registry access + Mobile apps

End-to-end onboarding

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+ Pricing

+ Competitor Landscape

+ What our Agents Say

+ FAQs

+ Book a Demo

+ Ecosystem Solutions

SmartSearch///

We serve regulated businesses with efficient and cost-effective client verification tools, delivering Anti-Money Laundering (AML), Know Your Customer (KYC) and Customer Due Diligence (CDD) information, ensuring our clients businesses remain compliant and protected.

Product overview

+ Individual AML name DOB checks – with AML report
+ KYC – Sanctions PEP SIP and RCA checks
+ Enhanced due diligence flag (manual reporting)
+ Daily monitoring service flagged in the SmartSearch database
+ Business AML checks from Companies House and credit scores
+ App to complete checks – no login for clients

Pricing

+ Cost plan based on search volumes
+ I-Packs:
  - Compliance, legal preparation and conveyancing
  - Outsourced compliance – lifetime legal

Strengths

+ Comprehensive AML verification software
+ Award-winning software
+ App for on-the-move/easier AML checks
+ Customer search data held on Smartsearch for monitoring
+ World wide sanctions list

Weaknesses/How we win

+ No client journey and remote AML/ID check options (only through agent-managed App)
+ No additional services offered such as, Title Insight information, PIQ, Conveyancing etc.
+ No client charging options

Kill points

+ Scalable platform for agents, which covers the KYC and CDD needs

Product comparison

Feature	SmartSearch	movebutler
Primary Focus	Compliance	End to end onboarding
Client-facing digital onboarding journeys & dashboard	–	●
Integrated Risk Assessment Tool	–	●
Due Diligence completion guidance	●	●
Online Identification Checks	●	●
Evidenced Audit trail	●	●
Title Registers and Title Plans directly from Land Registry	–	●
Title insight reports	–	●
Free Title Register download and insights report on all transactions*	–	●
AML Verification	●	●
Sanction & PEP compliance	●	●
Free AML Training Content	●	●
Automatic MLO Alerts on high-risk cases	–	●
Upfront material information/ Integrated PIQ	–	●
Conveyancing panel	–	●
Conveyancing packs upfront	–	●
Searches ordered on sale agreed	–	●
Searches ordered on instruction	–	●
Surveys	–	●
Financial Prospecting tool	–	●
Proof/Source of fund checks	–	–
Mortage panel	–	–
Property Reports	–	Groups

Landmark Agent.

We provide access to the UK's largest source of property and land data, helping agents make every property transaction feel as effortless as possible.

Product overview

- + Compliance – AML, PEP and Sanctions and proof of ownership
- + Digital onboarding
- + Upfront searches
- + Floorplans
- + Outsourced Compliance
- + Full integration with your existing systems via our API

Pricing

- + Full electronic - £3.60
- + Title documents - £3.00

Strengths

- + Offering fully managed Compliance service
- + Modular system customisable to the agent/service provider
- + Strong claims - Claims 95%+ pass rate first time and over 80% of refer and warning cases completed in 2 days
- + Panel management services backed up by Landmark data

Weaknesses/How we win

- + Potentially the leadership – with bad Glassdoor/Indeed reviews from staff members
- + No Risk Assessment tool and pre-check due diligence

Kill points

- + Offering Compliance and upfront searches to get clients contract-ready earlier in the process. With additional services of EPC and outsourced Compliance services

Product comparison

Feature	Landmark	movebutler
Primary Focus	Compliance	End to end onboarding
Client-facing digital onboarding journeys & dashboard	●	●
Integrated Risk Assessment Tool	–	●
Due Diligence completion guidance	–	●
Online Identification Checks	●	●
Evidenced Audit trail	●	●
Title Registers and Title Plans directly from Land Registry	Ownership checks only	●
Title insight reports	●	●
Free Title Register download and insights report on all transactions*	●	●
AML Verification	●	●
Sanction & PEP compliance	●	●
Free AML Training Content	●	●
Automatic MLO Alerts on high-risk cases	Managed	●
Upfront material information/ Integrated PIQ	–	●
Conveyancing panel	–	●
Conveyancing packs upfront	●	●
Searches ordered on sale agreed	●	●
Searches ordered on instruction	–	●
Surveys	–	●
Financial Prospecting tool	–	●
Proof/Source of fund checks	–	–
Mortage panel	–	–
Property Reports	–	Groups

CREDAS

Credas can streamline your onboarding process using market leading technology to revolutionise the way you manage Compliance and due diligence.

Product overview

+ ID Verification
+ Proof of ownership checks
+ Automated invite reminders
+ KYC checks – PEPs and Sanctions

Pricing

+ PAYG or monthly billing options
+ ID checks for as little as £0.25p

Strengths

+ Possible to integrate Credas in to CRM/internal systems
+ Biometric facial recognition technology
+ Remote ID checks
+ Leading software solution for AML and KYC checks

Weaknesses/How we win

+ Link access only to ID Verification – Only part of the process and doesn't offer client-facing solutions other than ID checks

Kill points

+ Leading solution for AML and KYC checks with remote ID check options and integration with CRM

Product comparison

Feature	Credas	movebutler
Primary Focus	Compliance	End to end onboarding
Client-facing digital onboarding journeys & dashboard	●	●
Integrated Risk Assessment Tool	●	●
Due Diligence completion guidance	●	●
Online Identification Checks	●	●
Evidenced Audit trail	●	●
Title Registers and Title Plans directly from Land Registry	Ownership checks only	●
Title insight reports	–	●
Free Title Register download and insights report on all transactions*	–	●
AML Verification	●	●
Sanction & PEP compliance	●	●
Free AML Training Content	–	●
Automatic MLO Alerts on high-risk cases	–	●
Upfront material information/ Integrated PIQ	–	●
Conveyancing panel	–	●
Conveyancing packs upfront	–	●
Searches ordered on sale agreed	–	●
Searches ordered on instruction	–	●
Surveys	–	●
Financial Prospecting tool	–	●
Proof/Source of fund checks	●	–
Mortage panel	–	–
Property Reports	–	Groups

creditsafe

Creditsafe, the global business intelligence experts, specialise in business credit checking and all round B2B solutions.

Product overview

+ AML Checks – PEP and Sanctions
+ ID Verification (ID Scan)
+ Bank Data Verification
+ Electronic Verification

Pricing

+ Unknown

Strengths

+ Open API for CRMS, Salesforce and Sage already created
+ System can be used by web link, built into your existing App or as portal access for staff to use

Weaknesses/How we win

+ As standard link access only to ID Verification - Only part of the process and doesn't offer client-facing solutions other than ID checks

Kill points

+ Addition of the Bank Data Verification on top of standard ID Verification, PEP and Sanctions checks

Product comparison

Feature	Creditsafe	movebutler
Primary Focus	Compliance	End to end onboarding
Client-facing digital onboarding journeys & dashboard	✓	✓
Integrated Risk Assessment Tool	–	✓
Due Diligence completion guidance	–	✓
Online Identification Checks	✓	✓
Evidenced Audit trail	✓	✓
Title Registers and Title Plans directly from Land Registry	Ownership checks only	✓
Title insight reports	–	✓
Free Title Register download and insights report on all transactions*	–	✓
AML Verification	✓	✓
Sanction & PEP compliance	✓	✓
Free AML Training Content	✓	✓
Automatic MLO Alerts on high-risk cases	–	✓
Upfront material information/ Integrated PIQ	–	✓
Conveyancing panel	–	✓
Conveyancing packs upfront	–	✓
Searches ordered on sale agreed	–	✓
Searches ordered on instruction	–	✓
Surveys	–	✓
Financial Prospecting tool	–	✓
Proof/Source of fund checks	?	–
Mortage panel	–	–
Property Reports	–	Groups

![thirdfort logo]

thirdfort turns Compliance into a competitive advantage, offering beautifully secure onboarding for regulated businesses operating across legal and property.

Product overview

+ Level 1: Electronic address match, PEP, Sanctions–no client App needed
+ Level 2: 1 + ID and liveness checks
+ Level 3: 2 + NFC chip reading, Proof of ownership (upload)
+ Additional - Source of funds checks – open banking or uploads

Pricing

+ PAYG for less than 25 KYC/AML checks per month
+ Monthly for more than 25 KYC/AML checks per month
+ Volume discounts from 10%
+ Rolling credits
+ Monthly minimums

Strengths

+ Chases completions
+ Included source of funds and proof of funds checks

Weaknesses/How we win

+ Clients have to download an App to use
+ Tied into annual contracts with Pro version
+ Proof of ownership has to be uploaded by the client using specific documents/ original letters which may not be as easy to get
+ No add-on services or chances to monetise the process

Kill points

+ Covers source and proof of funds checks as well as AML with support from thirdfort to chase completions
+ Got a secure link that can be used for sharing with multiple agencies

Product comparison

Feature	Thirdfort	movebutler
Primary Focus	Compliance	End to end onboarding
Client-facing digital onboarding journeys & dashboard	app	●
Integrated Risk Assessment Tool	–	●
Due Diligence completion guidance	–	●
Online Identification Checks	●	●
Evidenced Audit trail	●	●
Title Registers and Title Plans directly from Land Registry	–	●
Title insight reports	–	●
Free Title Register download and insights report on all transactions*	–	●
AML Verification	●	●
Sanction & PEP compliance	●	●
Free AML Training Content	–	●
Automatic MLO Alerts on high-risk cases	–	●
Upfront material information/ Integrated PIQ	–	●
Conveyancing panel	–	●
Conveyancing packs upfront	–	●
Searches ordered on sale agreed	–	●
Searches ordered on instruction	–	●
Surveys	–	●
Financial Prospecting tool	–	●
Proof/Source of fund checks	●	–
Mortage panel	–	–
Property Reports	–	Groups

VERIPHY ✓
A Davies Company

Veriphy is a multi-award-winning AML and Compliance Platform delivering flexible Compliance to thousands of professionals. Our ability to draw from a multitude of data points has allowed them to formulate a comprehensive suite of people and company checks in order to satisfy AML, KYC and regulatory Compliance needs all in one place.

Product overview

+ They deliver top quality Compliance that allows their users to align costs with usage. Simply put; "No Checks - No Charge"

Pricing

+ Anti-Money Laundering Check £5.00
+ AML Training Course £30.00

Strengths

+ Instant customer verifications
+ 91% approval rate on all Compliance checks
+ Flexible Compliance
+ API web service

Weaknesses/How we win

+ FREE AML Training content
+ Automatic MLO Alerts on high risk cases
+ A full journey including add-on services

Kill points

+ Both AML and KYC solutions
+ Checks in just 3 seconds
+ Flexible Compliance

Product comparison

Feature	Veriphy	movebutler
Primary Focus	Compliance	End to end onboarding
Client-facing digital onboarding journeys & dashboard	–	✓
Integrated Risk Assessment Tool	✓	✓
Due Diligence completion guidance	–	✓
Online Identification Checks	✓	✓
Evidenced Audit trail	–	✓
Title Registers and Title Plans directly from Land Registry	✓	✓
Title insight reports	–	✓
Free Title Register download and insights report on all transactions*	✓	✓
AML Verification	✓	✓
Sanction & PEP compliance	✓	✓
Free AML Training Content	✓	✓
Automatic MLO Alerts on high-risk cases	–	✓
Upfront material information/ Integrated PIQ	–	✓
Conveyancing panel	–	✓
Conveyancing packs upfront	–	✓
Searches ordered on sale agreed	–	✓
Searches ordered on instruction	–	✓
Surveys	–	✓
Financial Prospecting tool	–	✓
Proof/Source of fund checks	✓	–
Mortage panel	–	–
Property Reports	–	Groups

- End-to-end onboarding
+ iamproperty
+ Proposition
+ Features
+ Pricing
+ Competitor Landscape
+ What our Agents Say
+ FAQs
+ Book a Demo
+ Ecosystem Solutions

Developed and brought to you by the team behind LFS, Minerva is the culmination of hard work, development and research in a mission to bring a solution to law firms that is efficient, safe, time saving and easy to use for all who do.

Product overview

+ eIDV AML with a PEP and Sanctions checks – using Credas
+ Source of funds checks – open banking
+ Online forms for Upfront Material Information
+ Digital onboarding
+ Dashboard – case tracking and auto reminders
+ Land Registry

Pricing

+ Unknown – Possibly free Compliance for agents as this is paid for and undertaken by the Conveyancer

Strengths

+ Uses Credas for ID and AML, PEP and Sanctions checks
+ Designed for Conveyancers so has ready-made list of conveyancers using the platform
+ Data shared between Conveyancer and agent so there is only one view of the information

Weaknesses/How we win

+ Additional services and revenue opportunities
+ Risk Assessments and due diligence
+ movebutlers supporting service uptake

Kill points

+ Contract ready programme - Sold properties within 8 weeks of listing and 5 weeks of MOS. Conveyancer gets the client ready upfront saving time when the buyer is found

Product comparison

Feature	Minerva	movebutler
Primary Focus	Onboarding for Conveyancers	End to end onboarding
Client-facing digital onboarding journeys & dashboard	✔	✔
Integrated Risk Assessment Tool	–	✔
Due Diligence completion guidance	–	✔
Online Identification Checks	✔	✔
Evidenced Audit trail	✔	✔
Title Registers and Title Plans directly from Land Registry	Unknown	✔
Title insight reports	–	✔
Free Title Register download and insights report on all transactions*	Unknown	✔
AML Verification	✔	✔
Sanction & PEP compliance	✔	✔
Free AML Training Content	–	✔
Automatic MLO Alerts on high-risk cases	–	✔
Upfront material information/ Integrated PIQ	✔	✔
Conveyancing panel	Conveyancer run	✔
Conveyancing packs upfront	Conveyancer run	✔
Searches ordered on sale agreed	–	✔
Searches ordered on instruction	–	✔
Surveys	–	✔
Financial Prospecting tool	–	✔
Proof/Source of fund checks	✔	–
Mortage panel	–	–
Property Reports	–	Groups

a.v.rillo
CONVEYANCING

Formed in 1998 by two brothers focusing on people first, reduced risk Conveyancing. Now dealing exclusively with word-of-mouth referrals, they are trusted to virtually guarantee a client's move.

Product overview

+ Conveyancing service
+ Uses Checkboard AML/ID Verification
+ Sale-ready packs
+ If the client doesn't love them then they don't pay
+ Upfront searches (5 pack) with Search Guarantee
+ Online payments
+ 24/7 access to your case, automatic emails and texts

Pricing

+ No tie ins. No contract
+ Agents suggest a referral fee

Strengths

+ Control and speed up Conveyancing
+ Search Guarantee
+ Indemnity Insurance
+ 95% success rate
+ Turn your pipeline 4 times a year, not twice
+ Difficulty score on property Conveyancing

Weaknesses/How we win

+ Only offer the Conveyancing piece, no additional services
+ Reviews seem to show:
  • A similar problem to the industry standard, the portal is only as good as the conveyancer updating it
  • Possibly rely too much on the portal for communication so loses the human touch

Kill points

+ Sale ready pack from a conveyancer, offering the full service with insurances

Product comparison

Feature	Avrillo	movebutler
Primary Focus	Sale-Ready Packs	End to end onboarding
Client-facing digital onboarding journeys & dashboard	–	✓
Integrated Risk Assessment Tool	–	✓
Due Diligence completion guidance	–	✓
Online Identification Checks	✓	✓
Evidenced Audit trail	–	✓
Title Registers and Title Plans directly from Land Registry	Supplied	✓
Title insight reports	✓	✓
Free Title Register download and insights report on all transactions*	✓	✓
AML Verification	✓	✓
Sanction & PEP compliance	✓	✓
Free AML Training Content	–	✓
Automatic MLO Alerts on high-risk cases	–	✓
Upfront material information/ Integrated PIQ	✓	✓
Conveyancing panel	✓	✓
Conveyancing packs upfront	✓	✓
Searches ordered on sale agreed	✓	✓
Searches ordered on instruction	–	✓
Surveys	–	✓
Financial Prospecting tool	–	✓
Proof/Source of fund checks	–	–
Mortage panel	–	–
Property Reports	–	Groups

- End-to-end onboarding
+ iamproperty
+ Proposition
+ Features
+ Pricing
+ **Competitor Landscape**
+ What our Agents Say
+ FAQs
+ Book a Demo
+ **Ecosystem Solutions**

APLYiD

We built APLYiD to give businesses complete confidence that their customers are who they say they are. Our people empower customers to thrive by providing an exceptional human service. AU/NZ company - Launched in the UK in 2021.

Product overview

+ They have a mantra "technology is for everybody". They are a relatively new company with very low pricing and describe their AML process as "only taking 90 seconds"

Pricing

+ AML from £1.50
+ Pay monthly or upfront to suit your business with your flexible package!

Strengths

+ Good branding, looks different
+ Wider AU NZ business

Weaknesses/How we win

+ A reputable and trustworthy brand
+ Offer AML and ID and do not include any additional services/support

Kill points

+ Integrations with Reapit and Apex 27

Product comparison

Feature	Aplyid	movebutler
Primary Focus	Compliance	End to end onboarding
Client-facing digital onboarding journeys & dashboard	●	●
Integrated Risk Assessment Tool	–	●
Due Diligence completion guidance	–	●
Online Identification Checks	●	●
Evidenced Audit trail	–	●
Title Registers and Title Plans directly from Land Registry	–	●
Title insight reports	–	●
Free Title Register download and insights report on all transactions*	–	●
AML Verification	●	●
Sanction & PEP compliance	●	●
Free AML Training Content	●	●
Automatic MLO Alerts on high-risk cases	–	●
Upfront material information/ Integrated PIQ	–	●
Conveyancing panel	–	●
Conveyancing packs upfront	–	●
Searches ordered on sale agreed	–	●
Searches ordered on instruction	–	●
Surveys	–	●
Financial Prospecting tool	–	●
Proof/Source of fund checks	–	–
Mortage panel	–	–
Property Reports	–	Groups

HIVE
HIVEEAS.CO.UK

We are a specialist technology company dedicated to the property industry for the development of property websites and innovative applications designed to add value and generate more revenue for our clients.

Product overview

+ Websites/360 tours
+ Conveyancing referral management (Hive boost)
+ I-Packs:
  • Compliance, legal preparation and conveyancing
  • Outsourced compliance – lifetime legal
  • PIQ, Title reg and plan, Market intelligence, utilities, local services
  • Lead gen mortgage, make an offer lead gen
  • Alerts for restrictions/covenants.
  • Legal Prep
  • Searches on offer agreed
  • Work with existing solicitors

Pricing

+ Free of charge. They get a cut of the referral fee

Strengths

+ Full service to get client legally prepared.
+ Includes Property Reports for buyers
+ Searches ordered on offer agreed
+ Pack includes media tours and photos

Weaknesses/How we win

+ Searches ordered in line with standard movebutler transactions, no fast-track
+ PIQ stand alone, no mention of protocol forms

Kill points

+ Full property information pack for buyers as well as covering all the onboarding process

Product comparison

Feature	Hive	movebutler
Primary Focus	Sale-Ready Packs	End to end onboarding
Client-facing digital onboarding journeys & dashboard	–	✓
Integrated Risk Assessment Tool	✓	✓
Due Diligence completion guidance	–	✓
Online Identification Checks	✓	✓
Evidenced Audit trail	–	✓
Title Registers and Title Plans directly from Land Registry	✓	✓
Title insight reports	Alerts	✓
Free Title Register download and insights report on all transactions*	✓	✓
AML Verification	Outsourced	✓
Sanction & PEP compliance	Outsourced	✓
Free AML Training Content	–	✓
Automatic MLO Alerts on high-risk cases	–	✓
Upfront material information/ Integrated PIQ	✓	✓
Conveyancing panel	✓	✓
Conveyancing packs upfront	✓	✓
Searches ordered on sale agreed	✓	✓
Searches ordered on instruction	–	✓
Surveys	–	✓
Financial Prospecting tool	–	✓
Proof/Source of fund checks	–	–
Mortage panel	–	–
Property Reports	✓	Groups

- End-to-end onboarding
- iamproperty
- Proposition
- Features
- Pricing
- Competitor Landscape
- What our Agents Say
- FAQs
- Book a Demo
- Ecosystem Solutions

COADJUTE™

Coadjute is an open ecosystem of purpose-built solutions for the property market. Built to speed up property transactions, reduce fall-throughs, and improve transparency of the process, the ecosystem consists of dedicated workspaces tailored to the participant's needs, connected by Coadjute's blockchain network.

Product overview

+ Digital Property Data Pack service – EPC Registry, HM Land Registry, and search providers
+ Portal for all members of the blockchain: buyer, Sellers, agents, conveyancers, lenders etc with:
  • Event tracking
  • Secure messaging
  • Document exchange – ID verification, KYC docs, sales contracts etc.
  • Mortgage funds transfer
+ Integrates with existing systems
+ Material information offering includes automatically collated data, pre-populated forms and branded exports

Pricing

+ Anecdotally – high price for agents

Strengths

+ Secure messaging and digital ID transfer
+ One view for all parties
+ Can be used from within their current system
+ Branded and autogenerated Material Information packs
+ Pre-populate BASPI and TA6 forms with real time updates
+ Secure blockchain data sharing for TA6 forms

Weaknesses/How we win

+ Only as good as the people updating it.
+ Limited to Conveyancers and CRMs signed up to the system. We can add any conveyancer
+ Support for conveyancing conversions
+ No risk assessment

Kill points

+ The secure messaging, document and money transfer
+ Material information auto-population and report branding
+ Digital TA smart forms

Product comparison

Feature	Coadjute	movebutler
Primary Focus	Sale-Ready Packs	End to end onboarding
Client-facing digital onboarding journeys & dashboard	✅	✅
Integrated Risk Assessment Tool	–	✅
Due Diligence completion guidance	–	✅
Online Identification Checks	✅	✅
Evidenced Audit trail	✅	✅
Title Registers and Title Plans directly from Land Registry	✅	✅
Title insight reports	✅	✅
Free Title Register download and insights report on all transactions*	✅	✅
AML Verification	✅	✅
Sanction & PEP compliance	✅	✅
Free AML Training Content	–	✅
Automatic MLO Alerts on high-risk cases	–	✅
Upfront material information/Integrated PIQ	✅	✅
Conveyancing panel	✅	✅
Conveyancing packs upfront	✅	✅
Searches ordered on sale agreed	–	✅
Searches ordered on instruction	✅	✅
Surveys	–	✅
Financial Prospecting tool	–	✅
Proof/Source of fund checks	–	–
Mortage panel	–	–
Property Reports	✅	Groups

kotini

Giving estate agents a single platform to onboard their buyers and sellers compliantly.

Product overview

+ Branded digital platform to manage the end-to-end onboarding process
+ Contract signing
+ ID & AML checks –Biometric identification, AML, PEPs and sanctions checks
+ Automated Material information
+ Property insight reports
+ Legal protocol forms pre-population from material information
+ Payment processing through kotini
+ Automated chasers
+ CRM integrations

Pricing

+ Pay as you go, a single fee for automated compliant onboard a property£45 /listing
+ Free without automated compliant onboarding

Strengths

+ Secure messaging and digital ID transfer
+ One view for all parties
+ Can be used from within their current system
+ Branded and autogenerated Material Information packs
+ Pre-populate material Information info property forms
+ Integration with Rex, Federation of Independent Agents, Propertymark, and Gazeal

Weaknesses/How we win

+ No additional services and revenue opportunities

Kill points

+ Prepopulated Material Information and branded packs
+ Integrated crm (Rex)

Product comparison

Feature	kotini	movebutler
Primary Focus	Sale-Ready Packs	End to end onboarding
Client-facing digital onboarding journeys & dashboard	●	●
Integrated Risk Assessment Tool	●	●
Due Diligence completion guidance	–	●
Online Identification Checks	●	●
Evidenced Audit trail	●	●
Title Registers and Title Plans directly from Land Registry	●	●
Title insight reports	–	●
Free Title Register download and insights report on all transactions*	–	●
AML Verification	●	●
Sanction & PEP compliance	●	●
Free AML Training Content	–	●
Automatic MLO Alerts on high-risk cases	–	●
Upfront material information/ Integrated PIQ	●	●
Conveyancing panel	–	●
Conveyancing packs upfront	●	●
Searches ordered on sale agreed	●	●
Searches ordered on instruction	–	●
Surveys	–	●
Financial Prospecting tool	–	●
Proof/Source of fund checks	–	–
Mortage panel	–	–
Property Reports	–	Groups

SIMPLIFY S

Through our relationships with estate agents, mortgage intermediaries, house builders and property administrators we play a vital role in keeping the country moving and are here to make it better.

Product overview

+ Conveyancing sales
+ Conveyancing delivery and panel management through myhomemove
+ Award-winning technology – eWay and ieWay
+ IPX local market analysis software
+ Appraisal and sales progression
+ Re-Trawl market listing updates and tracking
+ Probate and estate management support
+ Referrals
+ Home valuations
+ Specialist service for leasehold and shared ownership

Pricing

+ Purchase pack – £75
+ Sale pack – £65
+ Purchase and sale bundle – £115

Strengths

+ IPX customer engagement software, real-time market overviews
+ Onsite conveyancers, conveyancing portal
+ Bespoke panel make-up to reflect catchment area
+ Training
+ National incentive schemes
+ Free iPads with preloaded software for each site

Weaknesses/How we win

+ Security, huge data hack in 2023 and 2021
+ No additional services and revenue opportunities

Kill points

+ IXP real time market analysis software
+ Re-Trwal market listing tracket

Product comparison

Feature	Simplify	movebutler
Primary Focus	Sale-Ready Packs	End to end onboarding
Client-facing digital onboarding journeys & dashboard	✓	✓
Integrated Risk Assessment Tool	✓	✓
Due Diligence completion guidance	–	✓
Online Identification Checks	✓	✓
Evidenced Audit trail	–	✓
Title Registers and Title Plans directly from Land Registry	✓	✓
Title insight reports	✓	✓
Free Title Register download and insights report on all transactions*	–	✓
AML Verification	✓	✓
Sanction & PEP compliance	✓	✓
Free AML Training Content	–	✓
Automatic MLO Alerts on high-risk cases	–	✓
Upfront material information/Integrated PIQ	–	✓
Conveyancing panel	✓	✓
Conveyancing packs upfront	✓	✓
Searches ordered on sale agreed	✓	✓
Searches ordered on instruction	–	✓
Surveys	✓	✓
Financial Prospecting tool	–	✓
Proof/Source of fund checks	–	–
Mortage panel	–	–
Property Reports	✓	Groups

- End-to-end onboarding
+ iamproperty
+ Proposition
+ Features
+ Pricing
+ Competitor Landscape
+ What our Agents Say
+ FAQs
+ Book a Demo
+ Ecosystem Solutions

hipla

We provide a free platform that helps buyers evidence their buying position, which in turn provides a much-needed transparency to estate agents and sellers.

Product overview

+ Partnered with HM Land Registry
+ Digital legal packs
+ Digital signing service
+ ID/ALM service
+ Conveyancer quote tool
+ Lead smart, client support service
+ Home buyer passport
+ Property Handshake, A digital reservation agreement
+ Whitelabeled products

Pricing

+ Digital legal pack free or £10 / White label set-up free of £250
+ Free for buyers
+ All products can be configured to be free for estate agents and conveyancers
+ Agent commissions

Strengths

+ Supported by HM Land Registry and Mishcon De Reya
+ Saves 3-4 weeks of delays in the early stage of the conveyancing process
+ Choose who is on the conveyancing panel
+ Upfront legal packs

Weaknesses/How we win

+ No additional services and revenue opportunities
+ No end-to-end transaction management
+ No search ordering services

Kill points

+ Digital legal pack with material information upfront

Product comparison

Feature	hipla	movebutler
Primary Focus	Sale-Ready Packs	End to end onboarding
Client-facing digital onboarding journeys & dashboard	✅	✅
Integrated Risk Assessment Tool	✅	✅
Due Diligence completion guidance	✅	✅
Online Identification Checks	✅	✅
Evidenced Audit trail	–	✅
Title Registers and Title Plans directly from Land Registry	✅	✅
Title insight reports	–	✅
Free Title Register download and insights report on all transactions*	–	✅
AML Verification	✅	✅
Sanction & PEP compliance	✅	✅
Free AML Training Content	–	✅
Automatic MLO Alerts on high-risk cases	–	✅
Upfront material information/ Integrated PIQ	✅	✅
Conveyancing panel	✅	✅
Conveyancing packs upfront	–	✅
Searches ordered on sale agreed	–	✅
Searches ordered on instruction	–	✅
Surveys	–	✅
Financial Prospecting tool	–	✅
Proof/Source of fund checks	–	–
Mortage panel	–	–
Property Reports	✅	Groups

simply conveyancing

We are a leading firm of property lawyers in England and Wales specialising solely in residential conveyancing - we will guide you through the conveyancing process from start to finish.

Product overview

+ Digital client onboarding eConvey
+ Upfront searches
+ Compliance digital ID/AML checks
+ Title deeds
+ Home buying and selling, remortgaging, declaration of trust, lease extension, equity release, transfer equity conveyancing

Pricing

+ Fixed legal fees

Strengths

+ Manage your case 24/7, via eConvey
+ Online payments
+ Online ID checks
+ Real-time updates and case tracking

Weaknesses/How we win

+ No additional services and revenue opportunities
+ No risk assessment

Kill points

+ Highly specialised conveyancing team and accreditations

Product comparison

Feature	simply	movebutler
Primary Focus	Sale-Ready Packs	End to end onboarding
Client-facing digital onboarding journeys & dashboard	●	●
Integrated Risk Assessment Tool	–	●
Due Diligence completion guidance	–	●
Online Identification Checks	●	●
Evidenced Audit trail	–	●
Title Registers and Title Plans directly from Land Registry	●	●
Title insight reports	–	●
Free Title Register download and insights report on all transactions*	–	●
AML Verification	●	●
Sanction & PEP compliance	●	●
Free AML Training Content	–	●
Automatic MLO Alerts on high-risk cases	–	●
Upfront material information/ Integrated PIQ	●	●
Conveyancing panel	–	●
Conveyancing packs upfront	●	●
Searches ordered on sale agreed	–	●
Searches ordered on instruction	●	●
Surveys	–	●
Financial Prospecting tool	–	●
Proof/Source of fund checks	–	–
Mortage panel	–	–
Property Reports	–	Groups

![smartcompliance logo]

Save time and increase profits with Smart Compliance, a fully managed AML service that reduces risk and comes at no cost to estate agents, powered by Lifetime Legal.

Product overvw

+ Specialist compliance services
+ HMRC guidance and AML regulations
+ work as an extension of agent' team
+ No cost to agent with client paid fees + additional
+ services to increase cashflow
+ Dedicated Inbound Support
+ Our team is available to answer any AML queries you may have.
+ Compliance Assistance
+ Comprehensive AML checklist and templates for compliance policies and risk assessments
+ Bespoke Training
+ White-labelled Marketing Materials

Kill points

+ Integrations with CRMs (Reapit, Street)
+ Additional client benefits post-service

Strengths

+ Complimentary 3-month Lifetime Legal Membership to all compliance clients; including standard or mirror Will, unlimited legal advice, discounts on over 250 high street & global brands. mover protection.
+ Street and Reapit integration
+ Partners with Kotini

Weaknesses/How we win

+ No end-to-end onboarding journey, doesn't include Title Register, insights, conveyancing, surveys. Searches. Sole focus on AML.

Pricing

+ No partner fee for auctions
+ My auction - paid for service
+ Auction fees, Agents choose the buyer fee % andminimum
+ Bamboo/Rocket take a cutAgents retain any seller fees.
+ RICS members get an additional £1,200 for each property sold online in addition to any vendor fee they charge.

KEY
▬ Comprehensive Offering

Product comparison

	Smart Compliance	iamproperty
Client-facing digital onboarding journeys	▬	▬
& dashboard	▬	▬
Integrated Risk Assessment Tool	▬	▬
Due Diligence completion guidance	▬	▬
Online Identification Checks	▬	▬
Evidenced Audit trail	▬	▬
Title Registers and Title Plans directly from Land Registry	–	▬
Title insight reports	–	▬
Free Title Register download and insights report on all transactions*	–	▬
AML Verification	▬	▬
Sanction & PEP compliance	▬	▬
Free AML Training Content	▬	▬
Automatic MLO Alerts on high-risk cases	–	▬
Upfront material information	▬	▬
Conveyancing panel	–	▬
Conveyancing packs upfront	–	▬
Searches ordered on sale agreed	–	▬
Searches ordered on instruction	–	▬
Surveys	–	▬
Property reports	–	GROUP
Financial prospecting tool	–	▬
Proof/source of funds	–	–
Mortgage panels	–	–

veya

Veya offers an innovative solution for the residential real estate industry that helps streamline property sales through smart title deed data analysis.

Product overview

+ Digital onboarding
+ AML: Digital ID verification with PEP and Sanction screening, source of funds and proof of ownership, HMRC compliant AML checks, online reports.
+ Veya Report: property complexity score, tenure & title class, digital ID&V checks, existing charges, Copies of the official Land Registry Title Register & Plan
+ Conveyancer services: training, automated title checks and risk assessments, insight reports

Strengths

+ Title deed analysis & risk scoring
+ Automated risk flagging for ownership and legal issues
+ White labelled reports

Weaknesses/How we win

+ Not a full conveyancing services offering
+ No additional revenue apportunities

Pricing

+ Each Veya Report is charged at a flat rate on a pay as you go basis volume discounts for bespoke conveyancing software packages for medium and large conveyancing firms.
+ Monthly bill and itemised invoicing for clients

Kill points

+ Instant title risk scoring
+ Mobile apps

KEY
████ **Comprehensive Offering**

Product comparison

	Veya	iamproperty
Client-facing digital onboarding journeys	████	████
& dashboard	████	████
Integrated Risk Assessment Tool	████	████
Due Diligence completion guidance	████	████
Online Identification Checks	████	████
Evidenced Audit trail	████	████
Title Registers and Title Plans directly from Land Registry	████	████
Title insight reports	████	████
Free Title Register download and insights report on all transactions*	████	████
AML Verification	████	████
Sanction & PEP compliance	████	████
Free AML Training Content	████	████
Automatic MLO Alerts on high-risk cases	████	████
Upfront material information	████	████
Conveyancing panel	–	████
Conveyancing packs upfront	–	████
Searches ordered on sale agreed	–	████
Searches ordered on instruction	–	████
Surveys	–	████
Property reports	████	GROUP
Financial prospecting tool	–	████
Proof/source of funds	████	–
Mortgage panels	–	–

WHAT OUR AGENTS SAY

> "iamproperty offers a number of benefits and speeds up the process at the same time as taking some of the pressure off us. We can get involved if we need to but know that if we don't, the system and the relevant teams can assist."

Nicola Astley,
Robert Watts Estate Agents, West Yorkshire

> "Having our core systems under one roof with one delivery team and supplier, means we're able to do things more efficiently, effectively and with urgency."

Nick Neill,
EweMove

> "Having the movebutler and auction process together all under one roof means that you've got plenty of support there to really look after both parts of the business.""

Tom Cooper,
Tom Cooper powered by eXp

ACCELERATING AGENT SUCCESS

We are building partnerships and collaborating with Estate Agents to offer digital onboarding experiences that will delight our agent clients at every stage. Hear from some of our Partner Agents about how working with iamproperty is helping them to succeed.

Mark Smith
Managing Director
Robinsons Tees Valley

Press play to listen to our Partner Agent

Watch more agent case studies

- End-to-end onboarding
- + iamproperty
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- + Features
- + Pricing
- + Competitor Landscape
- + What our Agents Say
- + FAQs
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- + Ecosystem Solutions

MOVEBUTLER FAQS

GENERAL

1. How are time savings calculated?

The time savings movebutler generates are based on the average time it takes agents to carry out tasks such as Compliance and customer onboarding vs. how long the same tasks take using movebutler. Time savings for transactions is based on SLAs for movebutler Conveyancers completing tasks such as confirming their welcome pack, ordering Searches or carrying out enquires upfront vs. these tasks happening once a buyer is found which saves time to completion.

2. How and where are referral fees displayed?

We understand the need to be transparent with clients about Referral Fees and this information is displayed in the appropriate stages of the end-to-end onboarding journey.

3. How much does it cost?

The foundation of the service is our Compliance tool which is charged on a credit bundle basis. These credits can be redeemed to carry out multiple types of AML checks including PEP and Sanctions, Property Register Searches (PRS), Full Electronic Check and Biometric Identity Verification. Agents can offset this cost by charging clients for ID verification.

4. What if our agents only want to take some of the services?

The service has been designed to be flexible so our agents can configure the solution to suit their needs and only use the services they want; however, the service has been designed with the customer in mind to provide a full end-to-end onboarding experience with everything working seamlessly together. To get the full benefit, we would always recommend activating all services for the best results. And the best bit is, our agents can always turn services off as there are no lengthy contracts to worry about!

5. Can I use the service for auction referrals?

Our agents can use end-to-end onboarding to carry out Compliance for clients onboarding for auction sales. Our agent indicates this is an auction sale, and then is referred to branch or an Auction Specialist Conveyancers; Medway for a legal services quote depending on client preferences.

6. How will it help our agents win new business?

End-to-end onboarding helps reduce the admin burden of tasks associated with AML. It creates a superior customer experience with everything in one place, so clients can track their sale or purchase easily online. This is an attractive offering for our agents considering clients want improved control, visibility, and communication during their transaction and gives our agents a competitor to help win new instructions.

7. How do we introduce ourselves to clients?

Our teams work on a white label basis and will introduce themselves generally as the onboarding team of the agent.

8. What's the SLA on your contacts?

If a client requests help from the help desk this will be provided immediately when in office hours. We will also call all clients who have been onboarded digitally within 24 hours of completing their journey to discuss any services that they decided not to take up. If our agents take both Compliance and Legal Preparation modules, we enhance our client support provision with the introduction of a welcome call as standard for all clients going through digital onboarding. These calls are made by our specialist team and are designed to guide clients through the process, increase conversions and improve the overall experience.

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9. What if the Method of Sale Audit gives different advice to the vendor?

It is a legal requirement to make sure our agents have given the client the best advice for their circumstances and allowed them to consider all available options. This feature highlights options most likely to be of interest to the client, with a balanced summary of the pros and cons of each, to help them make an informed decision. The better suited the information provided, the more likely it will result in a positive outcome and customer satisfaction. It also will help provide realistic expectations for the timescales of their chosen option.

COMPLIANCE

10. What happens if a property is unregistered?

If a property is unregistered the system will not be able to download the Title from Land Registry. A message will appear informing our agent that they need to seek alternative ways of verifying ownership such as seeing a copy of the original deeds to the house.

11. What information on the Title does the system give you on freehold and leasehold?

The system provides the material facts that you need to be aware of under consumer protection regulations. This includes information on ownership, tenure and class of title.

12. How does the Biometric Identity Check work?

The Biometric Checks work by comparing a picture taken by the client via the online process with their passport or driving licence. The system will either find a match through facial recognition or if it cannot, due to picture quality or other issues, it will create an alert for you to check manually.

13. Why can't I use the standard Identification Checks when I have digital customer onboarding activated, rather than Biometric Checks?

The digital customer onboarding journeys are designed for ultimate speed, accuracy and convenience for the client. The online Biometric Check allows the client to complete the process completely online, so they do not need to attend an appointment in branch. Their ID is verified using facial recognition technology so you can confirm their identity remotely saving time but without compromising the robustness of your AML process.

14. Are there other methods of Identification Checks available with digital onboarding?

Yes, there is the option to turn on Full Electronic Confirmation for Low-risk clients. This will streamline the process for clients and offer our agents a more cost-effective option. Agents can charge clients for these checks. Additional Identification Checks may be required by the Conveyancer. This is an optional service so will have to be enabled separately.

15. Can agents charge clients for Identification Checks?

Yes, agents can charge for ID verification. The payment for this will be taken online through the Client Portal and forms part of the onboarding process.

16. If agents are am charging for Identification Checks, can they still get bulk discounts on the credits?

No, as each transaction goes through individually client charging is set to £3.80 ex vat per check, but our agents can then add their desired margin.

17. Do agents have to purchase credits if they are charging for Identification Checks?

Yes, this is still required even if they have customer charging enabled. Where the client does not make payment a maximum of 15 credits will be deducted from available credits.

18. Do credits have an expiry date?

Yes, each bundle is part of a 12-month contract, but agents can purchase additional credits at any time, restarting the 12-month contractual period.

19. How do I get free Title Register documents?

Free Title Register documents are available when agents sign up to both Compliance and Legal Preparation modules.
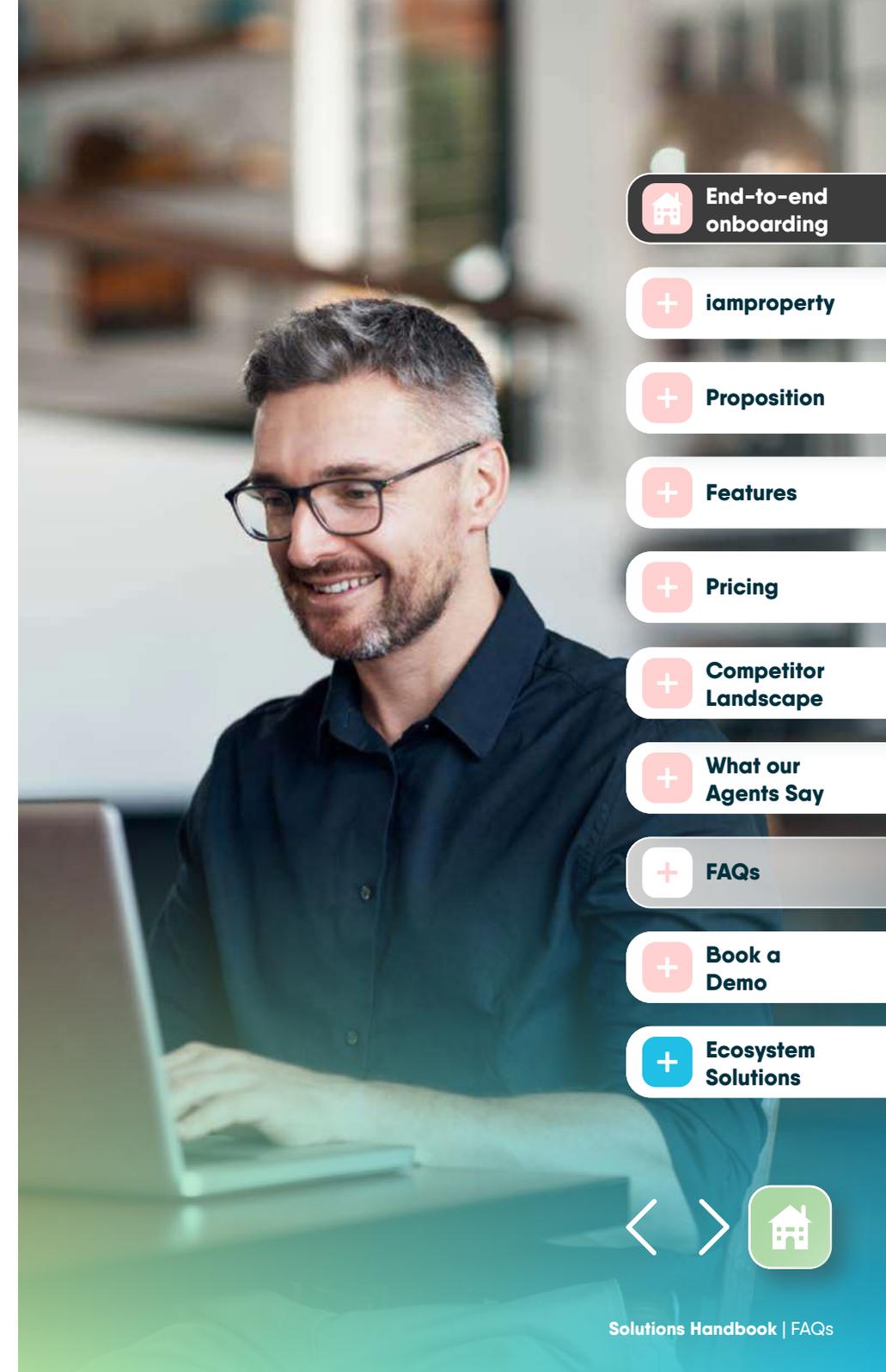
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20. Why do agents need to review the Customer Due Diligence (CDD)?

AML policy is about having robust policies in place by conducting Risk Assessments and conducting Identity Verification. Our solution provides guidance and collects the necessary information but needs additional human interaction to check whether there is anything that looks suspicious about a transaction.

21. Can agents waive the AML fee if the vendor does not want to pay it?

If the vendor does not want to pay the AML cost, the agent can waive the fee by advising the client to ignore the request. The agent will then be charged the credit value after 5 days.

22. Does this process work with trust or companies?

Yes, however, Trust and Companies need to have their Risk Assessment journeys completed by the agent using our solution. Digital onboarding journeys are not available for Trusts and Companies.

LEGAL PREPARATION MODULE

23. Can agents send Conveyancing quotes to prospective buyers, before they are marked as "buyer confirmed"?

A prospective buyer journey can be sent to the client which does not have the identity section included. If the prospective buyer becomes the buyer, our agent updates this in their agent dashboard at which point the system will then send an email to the buyer to take them through the Identity verification step but remove any parts of the journey that the buyer has already completed.

24. What's is the process for agents to onboarding their own solicitors?

Agents can onboard any Conveyancer. There are two routes, one for movebutler Managed Conveyancers and one for Agent Managed Conveyancers. movebutler Managed Conveyancers will need to adhere to our SLA's and agree to update the system regularly, accept ID and store their client care documentation within the solution. Agent Managed Conveyancers will simply get a referral from the

solution and our agents will be responsible.

25. Can agents have a mix of Conveyancers in the Conveyancing Panel?

Yes, they can have a mix of movebutler and Agent Managed Conveyancers or all of one type.

26. Will movebutler Managed and Agent Managed Conveyancers appear differently in the Conveyancing Panel?

Yes, to ensure the client is clear of the service offered after instruction, i.e. progression updates, there will be an indicator to show the different types of Conveyancers, highlighting the service levels to expect.

27. Are agents able to send multiple viewers the email offering conveyancing services for the same property?

Yes, they can send as many digital customer journeys to prospective buyers as they like.

28. What will show on the comparison quote for new Conveyancers that have not provided any service yet?

End-to-end onboarding conducts an assessment of the Conveyancer's recent performance and will add these facts and figures into the solution for use until the first properties are complete and then real time data and averages are calculated and populated in to the solution.

29. What happens when a Conveyancer reaches capacity?

When a Conveyancer reaches capacity, they will go on pause and be removed from all panels until their capacity is restored. This is really important as it ensures that Conveyancers maintain high service standards. This is only available on movebutler Managed Conveyancers.

30. How do the referral fees get paid?

movebutler Manged Conveyancer referral fees will be managed through iamproperty and will come directly to the agent in the monthly payments. Their fee will be agreed upfront. With the Agent Managed Conveyancers, they are responsible for any Referral
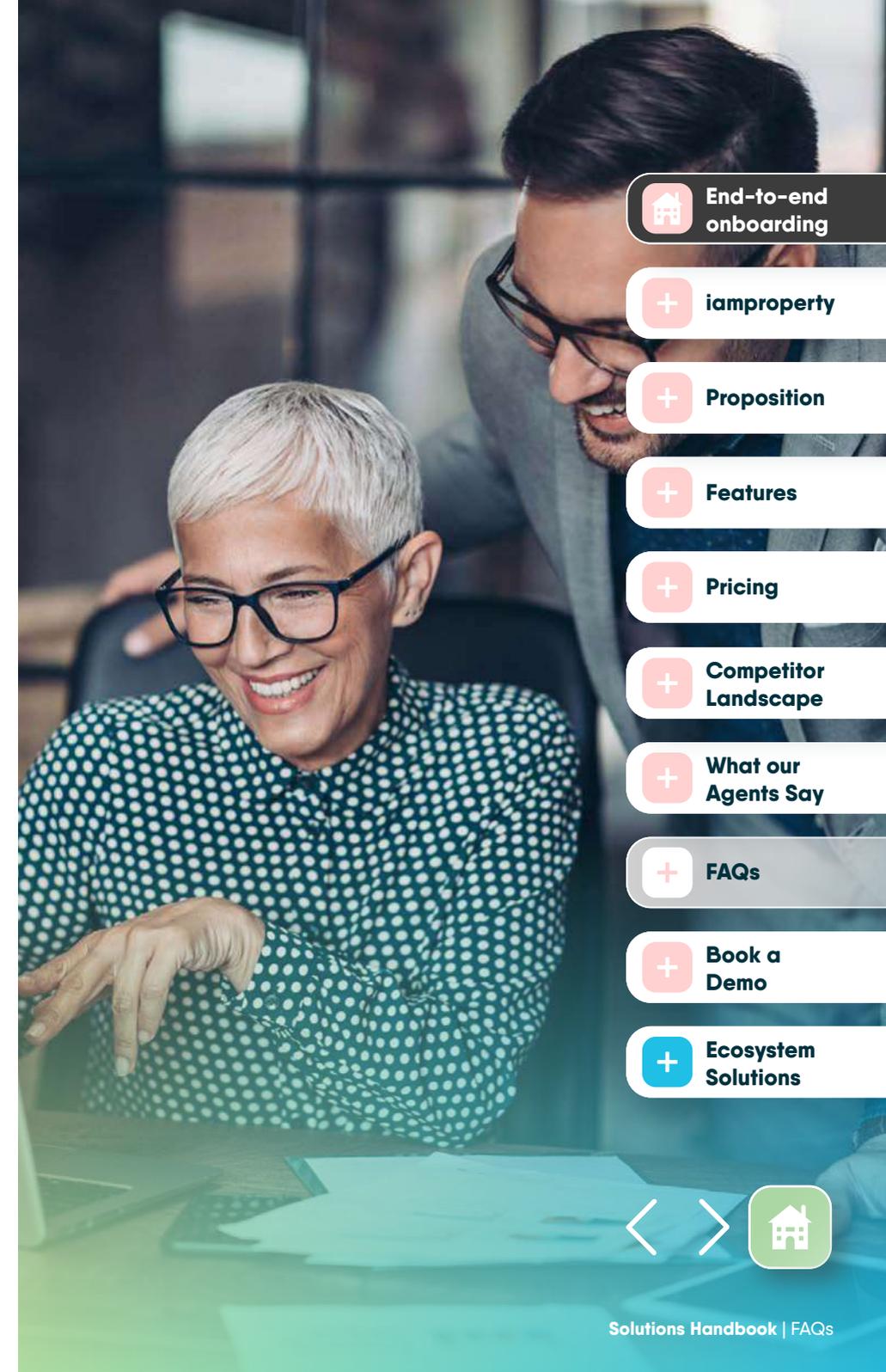
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arrangement, and will need to manage this outside of the movebutler platform.

31. Why should agents work with the movebutler Conveyancing Panel, if we already have their own system in place?

End-to-end onboarding provides our agents with a consistent and customisable client journey, with tools and services to encourage enhanced uptake of Conveyancing instructions, getting them more Referral Fees. Title Register documents and Material Information are supplied on instruction.

Searches are also completed sooner on SSTC rather than later in the sales process, meaning their clients can get moving more quickly. Our Search Guarantee provides extra assurance if the property sale falls through, we will provide new Searches at no extra cost. They can also add movebutler Managed Conveyancers who are progressively managed by our Panel Management Team to support them and save our agents time by reducing the admin burden.

32. Are there any costs to the client in the Legal Preparation Module?

In order to produce the Conveyancer file and provide the upfront information and Title register documentation, we will charge each vendor a £60 (inc. VAT) Upfront Set up Fee. This will be part of the total fee shown in the comparison table. It is also included in the quote, along with the Conveyancers' standard rates.

33. What information is provided to the Conveyancers?

On all instructions of movebutler Managed and Agent Managed Panel Conveyancers, they will receive Title information and ID verification documents. Conveyancers acting on behalf of buyers will also receive Searches. The cost for the Searches will form part of the buyer's quote and will be paid directly to iamproperty and noted on the client's file once paid.

34. How is the collection of upfront Material Information managed in movebutler?

Most of the Part A information is available within the Title Register and Title Register Insight Report. Each vendor is also provided with a questionnaire which

outlines all the questions needed for the rest of Part A and Part B.

SURVEYS MODULE

35. What types of surveys are available?

We are offering RICS Home Survey Level 2 (Survey Only), RICS Home Survey Level 2 (Survey and Valuation) and RICS Home Survey Level 3.

36. How will the surveys be offered?

The surveys will be listed in the platform and there is a tick box to request a call from our surveys partner who will call the client to go through the options and offer advice on which survey is right for their circumstances.

37. How will the buyer pay for the surveys?

Payment will be collected directly by our third party service provider.

38. Will there be any milestones added to the platform?

Yes, there will be milestones updated in both the client dashboard and in the client's file for call requested, request received, request instructed, appointment booked, report issued and cancellations.

39. Can the survey be cancelled within movebutler?

No, all cancellations need to be raised with our service provider directly. This will be confirmed on the service providers system and this will update the client file.

40. What referral fees will the you get for surveys?

Agents receive 7.5% of the survey value and this will be processed as part of their monthly payments after the survey has been completed.

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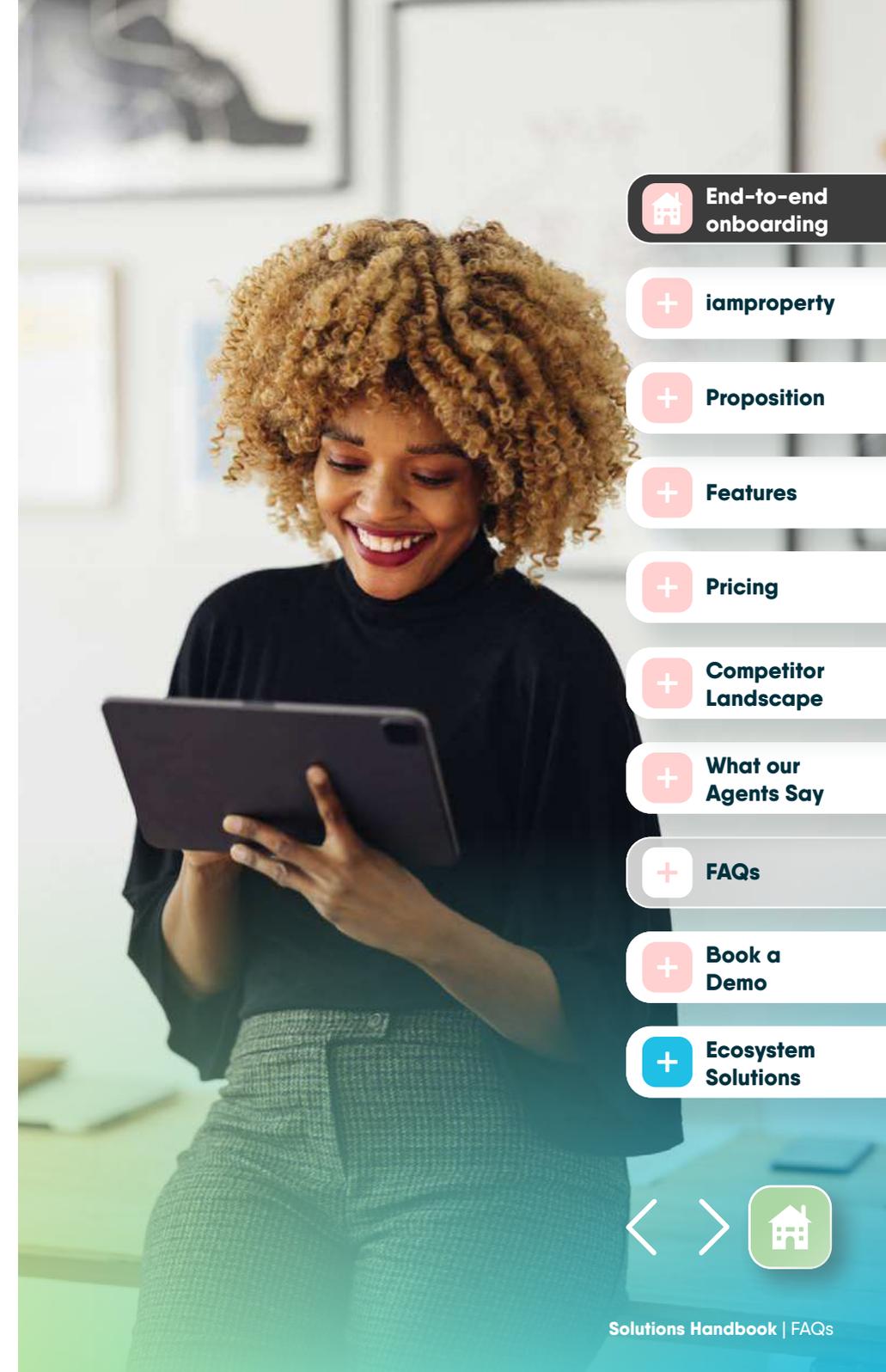
41. How much do the surveys cost?

This depends on the type of survey and the value of the property. The prices start from £400 for the RICS Home Survey Level 2 (Survey Only), £450 for RICS Home Survey Level 2 (Survey and valuation) and £750 for RICS Home Survey Level 3. This is based on properties under £100k. For the average UK property (£278k) it would be £545, £600 and £960 respectively.

42. Can the valuation option be used for securing a mortgage?

Most mortgage companies will require their own mortgage valuation in addition to the RICS Home Survey Level 2 (Survey and Valuation). This option is therefore suited to cash buyers who want the reassurance that their offer is at the market value and that they have the correct reinstatement cost to help them avoid under or over insurance.

DATA STORAGE AND USAGE

43. Who owns the data held on movebutler?

The agent owns the data and is the controller, iamproperty acts as the processor of this data. The data is securely stored in the solution which is managed and owned by iamproperty as the owner of the solution.

44. How is the data used?

iamproperty uses the data provided to ensure our end-to-end onboarding services enabled by our agent are delivered to the highest standard and to maximise revenue through customer and sales support. iamproperty will also use the data to analyse service usage and performance, allowing us to improve both the agent and client's experiences.
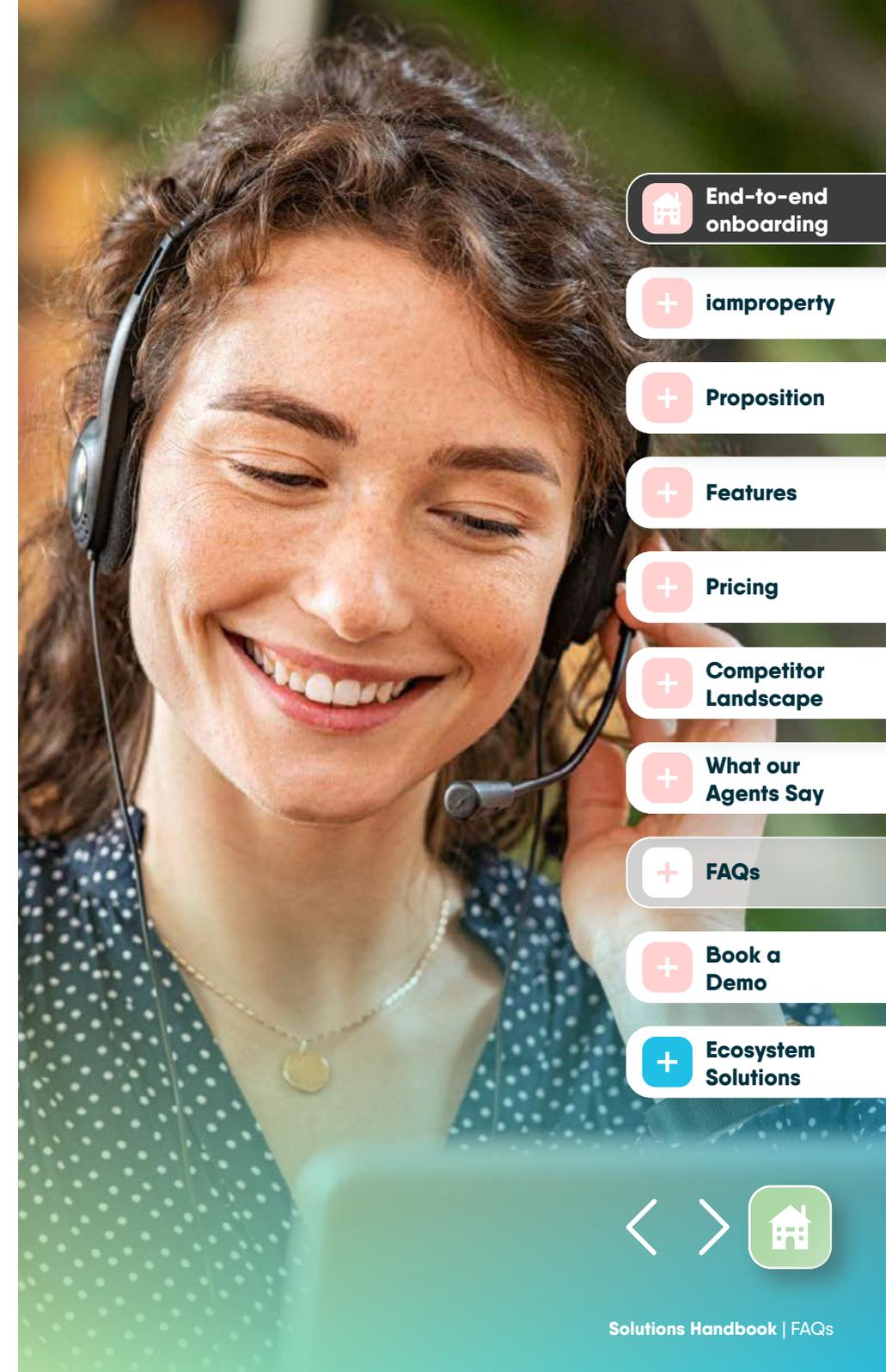
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BOOK A DEMO

Show the power of movebutler and organise a personalised demo for your agent.

IN THE DEMO WE'LL SHOW:

+ Automatic Title Review

+ Digital Risk Assessments

+ Identify Verification

+ TPO Code of Conduct

+ Legal and Financial Preparation

+ Upfront Material Information

+ Conveyancing Comparison

+ Property Surveys

Send your agents details to:
poppy.phipps@iamproperty.com

End-to-end onboarding

+ iamproperty

+ Proposition

+ Features

+ Pricing

+ Competitor Landscape

+ What our Agents Say

+ FAQs

+ Book a Demo

+ Ecosystem Solutions

AUCTION

AUCTION
HOW WE WIN

For clients that need more, iamproperty Auction offers a fast, secure, and transparent solution to win more instructions, delight clients, maximise revenue.

OUR SOLUTION MESSAGE

DISCOVER THE POWER OF AUCTION

Power-up your portfolio and succeed in any market, with fast, secure and transparent sales. With 56-day completions, a 95% success rate with commitment from all parties, and a pricing strategy designed to maximise interest and drive competitive bidding, delivering excellence for you and your clients. Our online Auction solution offers a much-needed alternative to the status quo. Don't just accept the norm – do things the modern way!

FASTER SALES. FASTER PAYMENTS. MORE REVENUE.

Maximise pipeline turn and increase sales revenue with higher fees, 56-day completions, 95% success rates, and 7-day* payments. It's simply better business for everyone!

SAVE TIME ON SALES PROGRESSION.

We do the heavy lifting for you when it comes to sales progression. Acting as an extension to your team, we keep the transaction moving and all parties informed – freeing you and your team up to do what you do best.

MORE CHOICE. MORE CONTROL. HS!

For clients that need more, Auction is the perfect choice, with speedier sales and a clear and transparent process. With full control over the Reserve Price – it ticks all the boxes with less stress, less hassle, and delights your clients.

SECURE SALES. SECURE CASH FLOW.

Online Auctions boost cash flow and offer a secure, transparent, hassle-free alternative for property sales. With commitment from all parties and no upfront fees, they are perfect for chain-free sellers and suitable for all property types.

AUCTIONS
TYPES OF PROPERTY S

Auction is ideal for chain-free sellers, who want a speedy and secure sale .

IT'S QUICK
Benefit from fixed 56-day* completion times. The slick and speedy process is great for agents, buyers and sellers alike.

IT'S TRANSPARENT
Bids are visible to everyone, and competitive bidding boosts sale prices. With upfront detailed Auction Packs clients get all the information they need, resulting in fewer lost sales

IT'S ONLINE
Our secure online platform creates smooth 24/7 bidding journeys with better experiences to help you delight your clients through the whole process.

IT'S FOR ALL TYPES OF PROPERTIES AND CLIENTS
Auctions are ideal for all types of property. If you have chain-free sellers, who want a speedy and secure sale, it could be ideal for their personal circumstances.

IT'S SECURE
The Auction process is efficient, transparent and more predictable. The 95% completion is more secure compared to the 70% completion rate of Private Treaty.

IT'S AN ADDITIONAL REVENUE STREAM
Increase sales revenue with higher selling fees and **7-day* payments**. It's just better business for everyone!

*From receipt of draft contract by a buyer's solicitor. Applies to grade one standard properties.
**From receipt of auction fee. Must qualify. Not applicable to caveated or £400k+ properties.

SCENARIOS IDEAL FOR AUCTION

The Modern Method of Auction (MMoA) is perfect for a wide range of properties.
Its not just for run down properties that won't sell on the open market. It's also ideal for clients who:

Have a property that's fallen through on the open market
There's more security and fewer concerns about the sale falling through again with MMoA.

Are moving into a care home
Seller can free-up cash quicker through the speed of MMoA.

Have inherited a property
A simple and stress-free sale takes sellers through the process with speed, security and transparency.

Are based overseas
If a seller is a distance away, they can rely on a quick, easy and secure sale process for their peace of mind. As the whole process is online, the seller can watch the auction progress from anywhere in the world.

Need to sell due to a marriage breakdown
Speed and certainty help sellers move ahead with their lives'. All with less stress.

Need to relocate
A seller can focus on their new life sooner, thanks to MMoA's speed and security.

Have a popular property
Transparent bidding can drive up the final sale price, encouraging competitive bidding.

Need speed and security of sale
If a seller wants to sell fast with additional security, no matter the reason, auction could be right for them.

REASONS TO BELIEVE

★

PIONEERS OF THE MODERN METHOD OF AUCTION

15 YEARS IN AUCTION SALES
UK leaders in property technology.

1% OF ALL PROPERTIES SOLD IN UK SOLD VIA IAMSOLD

£810,995
Rewards paid to Partner Agents in 2024.

£2,000,000
Ht sales price in 2024.

10,991
Properties sold in 2024.

208,063
Property viewings in 2024.

68,151
Bids placed in 2024.

FEES PAID TO PARTNER AGENTS VS PREVIOUS YEARS

2023	£41,429,266
2022	£33,137,862
2022	£25,064,796

OVER 6,500
Partner Agents in the iamproperty network.

WORTH OF PROPERTY SOLD (CAPITAL VALUE)

£1,934,105,236

£1,638,012,886

£1,256,537,383

| 2022 | 2023 | 2024 |

A WIN-WIN FOR EVERYONE

Today's consumers expect and demand more from the buying and selling process. Considering the record-breaking levels of online Auction activity and bids, it's clear that consumer confidence has grown in MMoA.

Our market leading Auction service benefits both our agents and their clients. It provides a faster, more secure move while delighting our agents clients with an expectational online experience.

As a Partner Agent, they can:

- Boost their cash flow...quicker. As they will earn lucrative fees and can be paid within 7-days*.
- Cut completion times in half and delight their clients.
- Increase their range of services with slick online processes.
- Slash their admin load with a dedicated, friendly and expert team.
- **Offer a no sale, no selling fees option to sellers!**

Meanwhile, our Sellers:

- Get speedier sales with motivated buyers.
- Acquire buyers who are serious and financially committed.
- Increase their property's exposure to a wider pool of buyers compared to Traditional Auction.
- No need to pay any selling fees.
- Guaranteed a fixed minimum value, with competition driving up the sale price.

And Buyers:

- Enjoy a faster completion with motivated sellers.
- Experience transparency every step of the way.
- Achieve a more secure buyer process.
- Get all the legal information upfront, so there are no surprises.
- Feel more confident with less threat of being gazumped.

* From receipt of auction fee. Must qualify. Not applicable to caveated or £400k+ properties.

Auction

iamproperty

Proposition

Understanding Auction

Features

Competitor Landscape

Target Audience

What our Agents Say

FAQs

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Ecosystem Solutions

SECURE SALES. SECURE CASH FLOW.

Online Auctions boost cash flow and offer a secure, transparent, hassle-free alternative for property sales.

With commitment from all parties and no upfront fees, Auction is perfect for chain-free sellers and suitable for all property types. But it's about more than just the property, it's about your clients circumstances and giving them choice on the method of sale that's right for them.

The Modern Method of Auction (MMoA) takes the best bits of both Traditional Auctions and Private Treaty sales and gives our agents so much more! Offering Auction helps our agents expand their services to succeed in any market.

Private Treaty	Modern Method of Auction	Traditional Auction
Over 130 days to complete	Usually completes within 56 days*	Usually completes within 28 days
70% completion success rate	95% completion success rate	99% completion success rate
Purchase with mortgage	Purchase with cash or a mortgage	Limited to cash buyers due to shorter timescales
No commitment from buyer	Committed buyer Reservation Fee	Committed buyer deposit + Reservation Fee
Seller fees apply	0% seller fees	0% seller fees

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* From receipt of draft contracts. Based on grade one standard properties.

THE POWER TO SELL QUICKLY AND SECURELY

Private Treaty

- Instruction
- Sold (SSTC)
- Searches ordered
- Searches returned
- Enquiries satisfied
- Ready to exchange
- Exchange
- Completion **130+ days**

Modern Method of Auction

- Instruction
- Legal Pack generated
- Sold (SSTC)
- Exchange
- Completion usually **56 days**

Traditional Auction

- Instruction
- Legal Pack generated
- Sold / Exchange
- Completion usually **28 days**

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THE AUCTION PROCESS

Every property sold at auction needs an auction pack. This pack provides prospective buyers with all the property information they'll need to make an informed choice before bidding.

iamproperty work alongside Medway Law to provide this service, or the seller can provide this information from another supplier.

The vendor decides to sell their property and picks an Estate Agent.

The vendor decides to sell by auction, this is typically driven by the agents recommendation.

AUCTION

The agent microsite or portal.

The buyer identifies a target property.

The winning bidder pays reservation fee or deposit.

The property completes within 56 or 28 days depending on the method of sale.

The agent is paid 50% of the reservation fee. The agent share is typically 1.875% of the final selling price.

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BUYER AUCTION JOURNEY

Not interested?

The potential buyer is not interested and continues their search for an alternative property.

Find a property

The buyer searches for a property, online or goes to their local Estate Agent and picks a property that is for sale by auction.

Viewing

The buyer contacts the Estate Agent to arrange a viewing.

Get buyer information pack

The buyer information pack is available once they have started the registration online or by speaking with one of the Auction Specialists.

Register to bid

The client will register to bid against the property online.

Auction live

Property advertising

The Agent advertises the property on property portals, in-branch and on iamsold.co.uk

Viewings undertaken

The Estate Agent facilitates the viewings and uploads them to auction dashboard.

Viewing feedback & auction preparation

iamsold contacts potential buyers after the viewings to gather feedback and ensure they are registered to bid, they will also carry out ID checks.

Bidding

Bids are usually placed online, but can in some circumstances be placed with the Auction Specialist over the phone, The buyer can see all bidding activity and auction time countdown.

Buyer wins the auction

Pays reservation fee, and if buying under Traditional Auction terms pays the deposit, and signs the reservation agreement.

Completion

Exchange and completion happen within 28 or 56 days depending on the method of auction.

Sales progression

Our auctions completions team will help to take the sale through to completion, keeping all parties and the agent updated.

Sale instructed

Notice of sale is issued they are committed to the purchase and complete within 28 or 56 days dependant on the terms in the reservation agreement.

Funding & ID checks

The winning bidder will be required to evidence how the purchase will be funded. This will be required before the exchange can take place. The auction team completes ID checks, a quick and easy process but a legal requirement for anyone buying a property.

Auction

+ iamproperty

+ Proposition

+ Understanding Auction

+ Features

+ Competitor Landscape

+ Target Audience

+ What our Agents Say

+ FAQs

+ Onboarding Agents

+ Ecosystem Solutions

SELLER AUCTION JOURNEY

Referral from movebutler MOSA
Client requests a call back if they have not sold their property withing 30 days via private treaty. The agent has given the Auction Specialist permission to talk to the seller about MMoA and they have opted to sell through auction.

KEY
- 🟩 Estate Agent
- 🟥 Auction Seller
- 🟦 iamproperty Auction Teams

Customer needs to sell quickly and securely
The customer needs to sell quickly and securely. The agent refers the seller to iamproperty to discuss auction or signs them up, leads are uploaded to their auction dashboard.

Market Appraisal
Market appraisal or welcome call completed by auction team. Method of auctioning and pricing strategy agreed with reserve price set by the seller.

Auction Contract
The seller agrees to the terms of the Auction, signs and returns the contract if they haven't already done so through the agent.

ID checks completed
The auction team completes ID checks, a quick and easy process but a legal requirement for anyone buying a property.

Property details created
The Estate Agent prepares property details including photographs and EPC if required and advertises the property in branch and/or online.

Pre-auction marketing
Whilst the Auction Pack is being prepared the property is advertised to generate as much exposure, interest and viewings as possible.

Auction Pack prepared
The Auction Pack provides information to potential buyers including legal documentation, it is a legal requirement to sell at auction.

Viewings undertaken
The Estate Agent facilitates the viewings and uploads them to auction dashboard.

Ready for auction
The auction pack is complete and the property is ready for Auction and interested parties can bid on the property.

Completion
Exchange and completion happen within 28 or 56 days depending on the method of auction.

Sales Progression
The auction team will help to take the sale through to completion, keeping all parties and the agent updated.

Sale Agreed
The buyer signs a reservation agreement and the reservation fee or deposit is paid so they are committed to the purchase and complete withing 28 or 56 days.
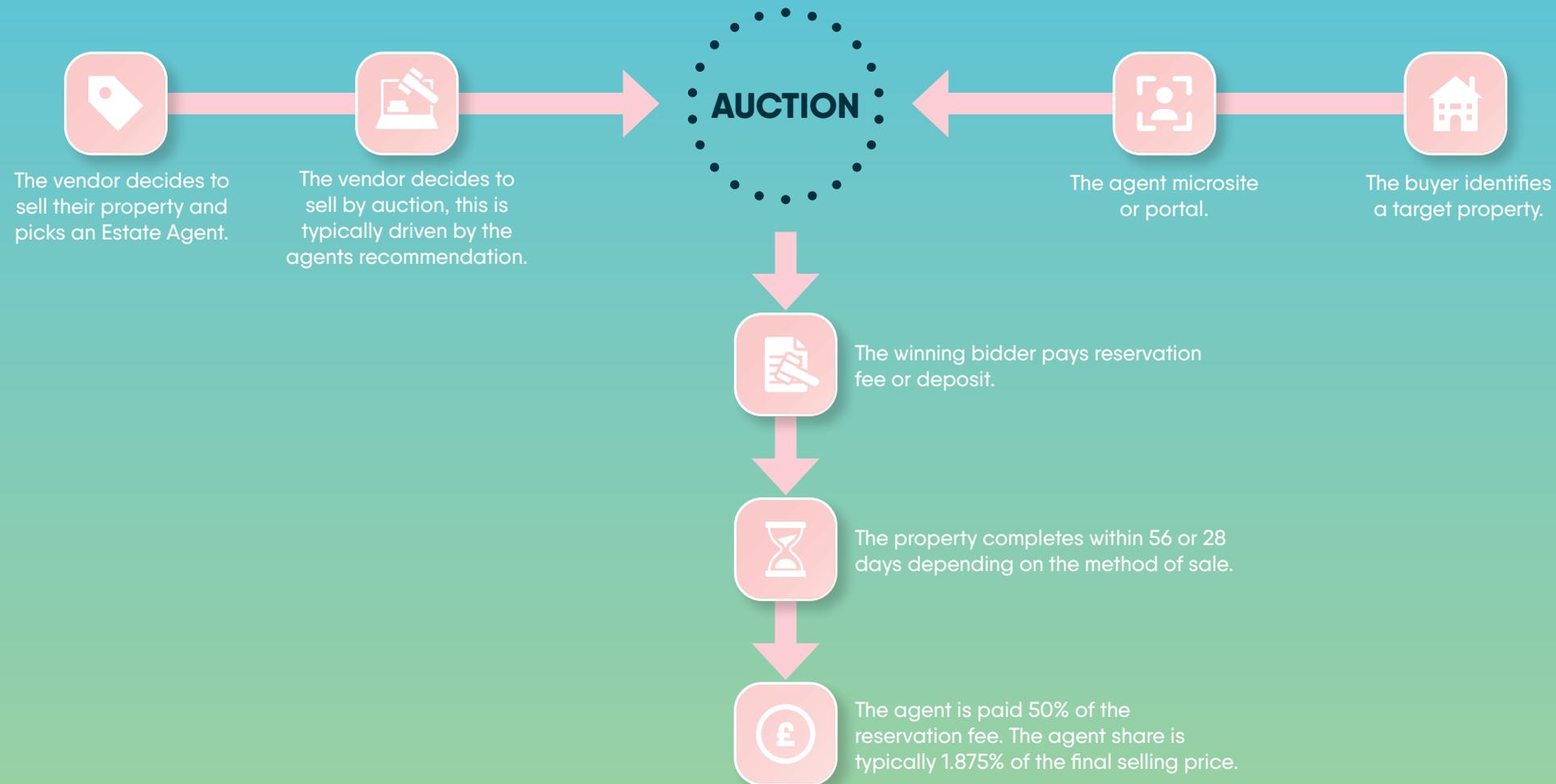
- 🏠 Auction
- + iamproperty
- + Proposition
- + Understanding Auction
- + Features
- + Competitor Landscape
- + Target Audience
- + What our Agents Say
- + FAQs
- + Onboarding Agents
- + Ecosystem Solutions

AGENT AUCTION JOURNEY

Customer identified and referred to iamsold

The customer needs to sell quickly and securely. The agent refers the seller to iamsold to discuss auction or signs them up, leads are uploaded to their iamsold dashboard.

Market Appraisal

Market appraisal or welcome call completed by iamsold team. Method of auctioning and pricing strategy agreed with reserve price set by the seller.

Auction Contract

The seller agrees to the terms of the Auction, signs and returns the contract if they haven't already done so through the agent.

ID checks completed

The iamsold auction team completes ID checks, a quick and easy process but a legal requirement for anyone buying a property.

Property details created

The Estate Agent prepares property details including photographs and EPC if required and advertises the property in branch and/or online.

Pre-auction marketing

Whilst the Auction Pack is being prepared the property is advertised to generate as much exposure, interest and viewings as possible.

Auction Pack prepared

The Auction Pack provides information to potential buyers including legal documentation, it is a legal requirement to sell at auction.

Viewing feedback & auction preparation

Iamsold contacts potential buyers after the viewings to gather feedback and ensure they are registered to bid, they will also carry out ID checks.

Viewings undertaken

The Estate Agent facilitates the viewings and uploads them to iamsold dashboard.

Ready for auction

The auction pack is complete and the property is ready for Auction and interested parties can bid on the property.

Agent Fees Paid

The agent receives their fees in as little as 7 days, depending on their current terms.

Completion

Exchange and completion happen within 28 or 56 days depending on the method of auction.

Sales Progression

The iamsold team will help to take the sale through to completion, keeping all parties and the agent updated.

Sale Agreed

The buyer signs a reservation agreement and the reservation fee or deposit is paid so they are committed to the purchase and complete withing 28 or 56 days.

MODERN METHOD OF AUCTION IN 5 MINUTES

Modern Method of Auction comes with a whole host of benefits for our Partner Agents and their clients.

Watch our five-minute video to understand:

+ The basics of MMoA and how it's different to other auction types

+ Understanding buyer reservations fees

+ Raising property finances and timescales

+ And much more

For each successful auction referral our Agents will receive 50% of the reservation fee, typically a minimum of 1.875% or £2,750 ex VAT.
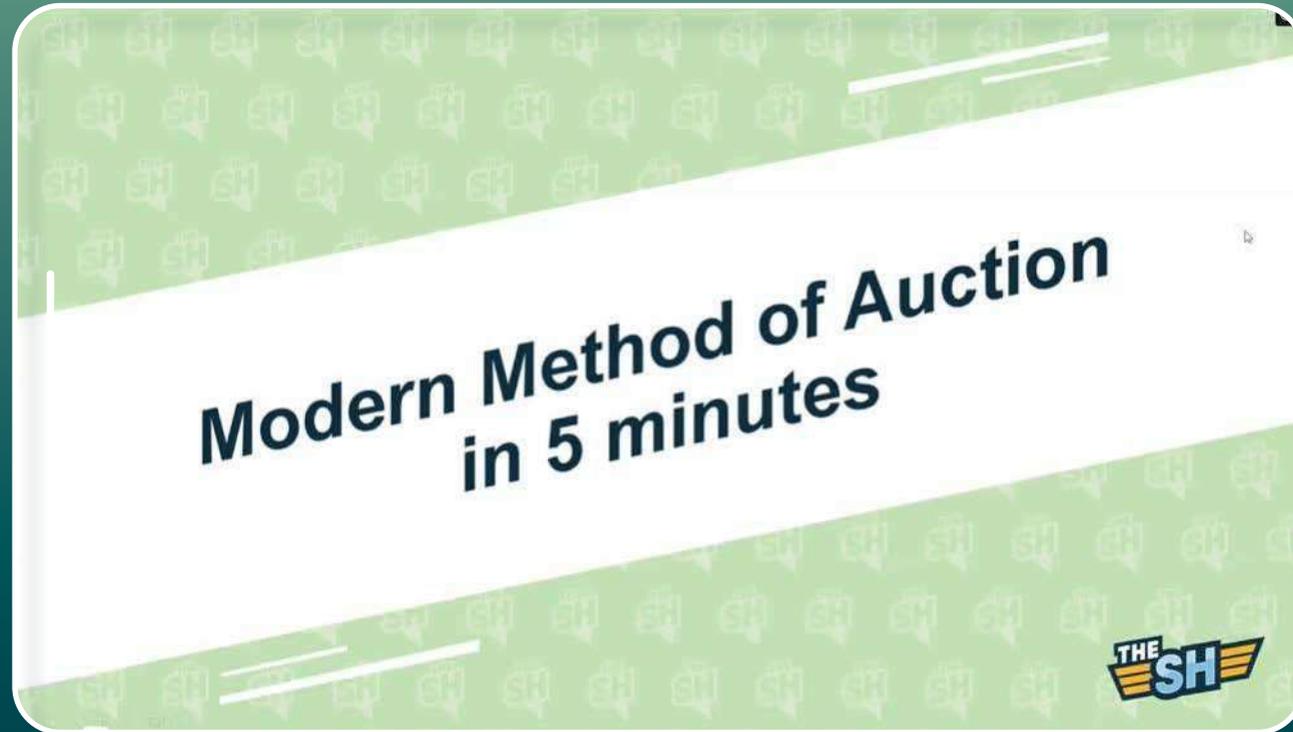
Modern Method of Auction in 5 minutes

THE SH

▶ Watch video

🏠 Auction

+ iamproperty

+ Proposition

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< > 🏠

AUCTION DASHBOARD

iamsold Auction dashboard is where our agents access everything, they need to manage their Auction services.

Agents can upload, view, and manage all their Auction properties from the iamsold dashboard. From listing properties on their microsite, managing stock availability, scheduling property viewings to real time online bidding.

Our ecosystem of services and solutions can all be accessed with one central login to improve the agent experience. Whether it's our Marketing Library and Success Hub, or our movebutler comprehensive onboarding services. The iamsold dashboard provides our agents with access to all the information needed to build their Auction services and skills.

Partner Agent Rewards

We run incentive programmes to reward agent employees, with prizes and vouchers to help them feel motivated to drive Auction sales.

£810,995
Rewards paid out 2024.

View all of your Auction stock with real time updates on bidding and time remaining

Quickly access common tasks

Access all iamproperty products in one place with one login

Upload a property or manage viewings

Marketing Library materials to help promote auction

Success Hub on-demand training

Claim rewards

AUCTION REFERRALS WITH METHOD OF SALE AUDIT

During the movebutler end-to-end onboarding process, vendors complete a quick circumstance checker which is designed to reduce withdrawals and increase sellers awareness of all methods of sale.

Where a vendor's circumstances may lend themselves to consideration of Auction, they can proactively request a call back to find out more, if they haven't sold within 30 days; generating potential future leads for the Auction service.

All leads generated through MOSA will be accessible directly from your auction dashboard.

Key MOSA benefits:

Put your clients' circumstances front and centre

Generates more Auction referrals

Ensures compliance, demonstrating TPO Code of Conduct

Here's a quick overview of the process

iam property — Dashboard — View all stock — Your rewards — MOSA leads — My Account

movebutler auction leads

Total Method of Sale Audit leads: 6

Days since update	Chain	Speed of move	Sale price	Property address	
28 days	Yes	Slow	100000	173 Lower Addiscombe Road, Croydon, CR0 6PZ	Upload lead
24 days	No	Fast	65000	Flat 51, Alexandra Court, Princess Road, Atherstone, CV9 1LB	Upload lead
17 days	Yes	Medium	230000	Apartment 174, Woods House, 7 Gatliff Road, London, SW1W 8DF	Upload lead

If Auction is suitable, the option to request a call back about MMoA is presented if the vendor has not sold within 30 days.

This request will appear on your Auction dashboard under the MOSA tab.

An Auction Specialist will call you after 37 days to discuss and agree the right approach for your vendor call back.

We will then call the vendor to discuss their options.

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CONNECTING CRM TO IAMSOLD

1 Add property from CRM

Add lead

2 iam property

Back to dashboard

Add property from CRM

Property details · Vendor details · Lead source

Find existing property from CRM database

Find property

5 Sunset Road, Leeds, West Yorkshire...
5 Sunset Road, York, West Yorkshire, Y...

3 iam property

Back to dashboard

Add property from CRM

Property details · Vendor details · Lead source

Select a vendor to start

Select existing vendor from CRM

Back   Continue

4 iam property

Back to dashboard

Add property from CRM

Property details · Vendor details · Lead source

Lead source

Lead type
○ Vendor   ○ Branch lead

Back

5 iam property

You have successfully added
a property lead!

Return to agent platform

What happens on the call with your client

Depending on the conversation with your client, we will discuss a variety of options, which may include the following payment and auction routes.

Payment routes

Buyer paid route
Upon successful sale, the buyer will be charged a fee of 4.20% to a minimum of £6,000.00. (This fee covers the auction and estate agent contract.)

Vendor paid route
Upon successful sale, the vendor will be charged a fee of 4.20% to a minimum of £6,000.00.

The buyer is charged a deposit which is taken from as part payment of the final negotiated selling price and will be deducted from the balance of the final selling price upon completion of contracts.

Auction routes

Modern method
Buyer will pay the reservation fee or deposit on the property.

Agent to exchange contracts and complete within 56 days of receiving draft contracts.

REDUCED DOUBLE ENTRY
Add clients to iamsold from CRM and for linked cases the Auction property viewings are automatically sent to iamsold.

BRANDED MARKETING AND TOOLS

Our Marketing Library helps our agents promote their new Auction service.

Our template-based assets can be tailored to our agent's branding and include many different marketing assets.

These include:

+ Window cards and stickers
+ Promotional leaflets and guides
+ Digital and print brochures
+ Postcards and mailers
+ Social media and website banners
+ Press and magazine adverts

How it works:

Agents choose which marketing assets they would like to use via the "Order Marketing" tab on the iamsold dashboard. They'll need to fill out the form on the chosen marketing asset to modify the design to their desired size and branding. Once we've received their request, our team will email back their new design as requested within 10 working days.

We also have preloaded Auction direct mail templates for agents to use within the [Marketing Toolkit](#).

Find out more
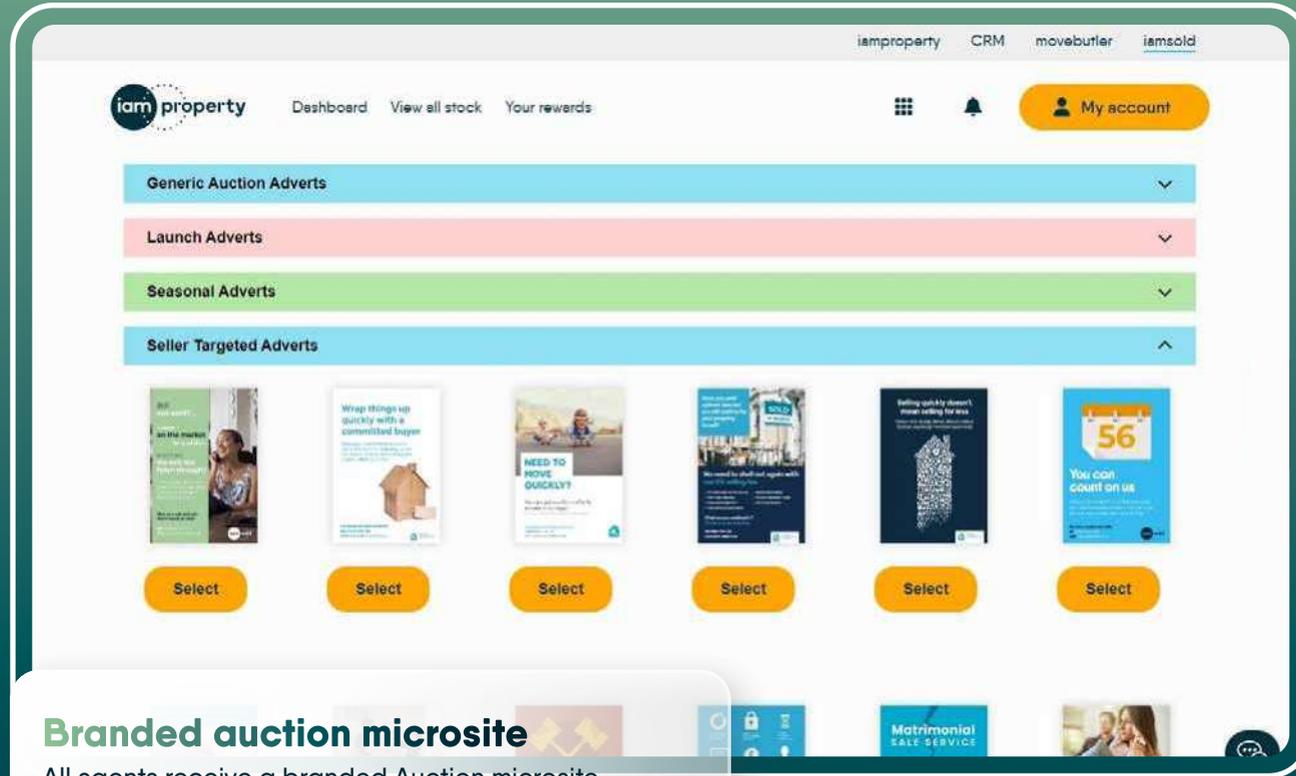
Branded auction microsite

All agents receive a branded Auction microsite to help create awareness around their Auction properties. If agents would like any updates or amends to their website, they need to contact marketing@iamproperty.com with their request and the iamproperty team will make the relevant updates.

Auction

+ iamproperty

+ Proposition

+ Understanding Auction

+ Features

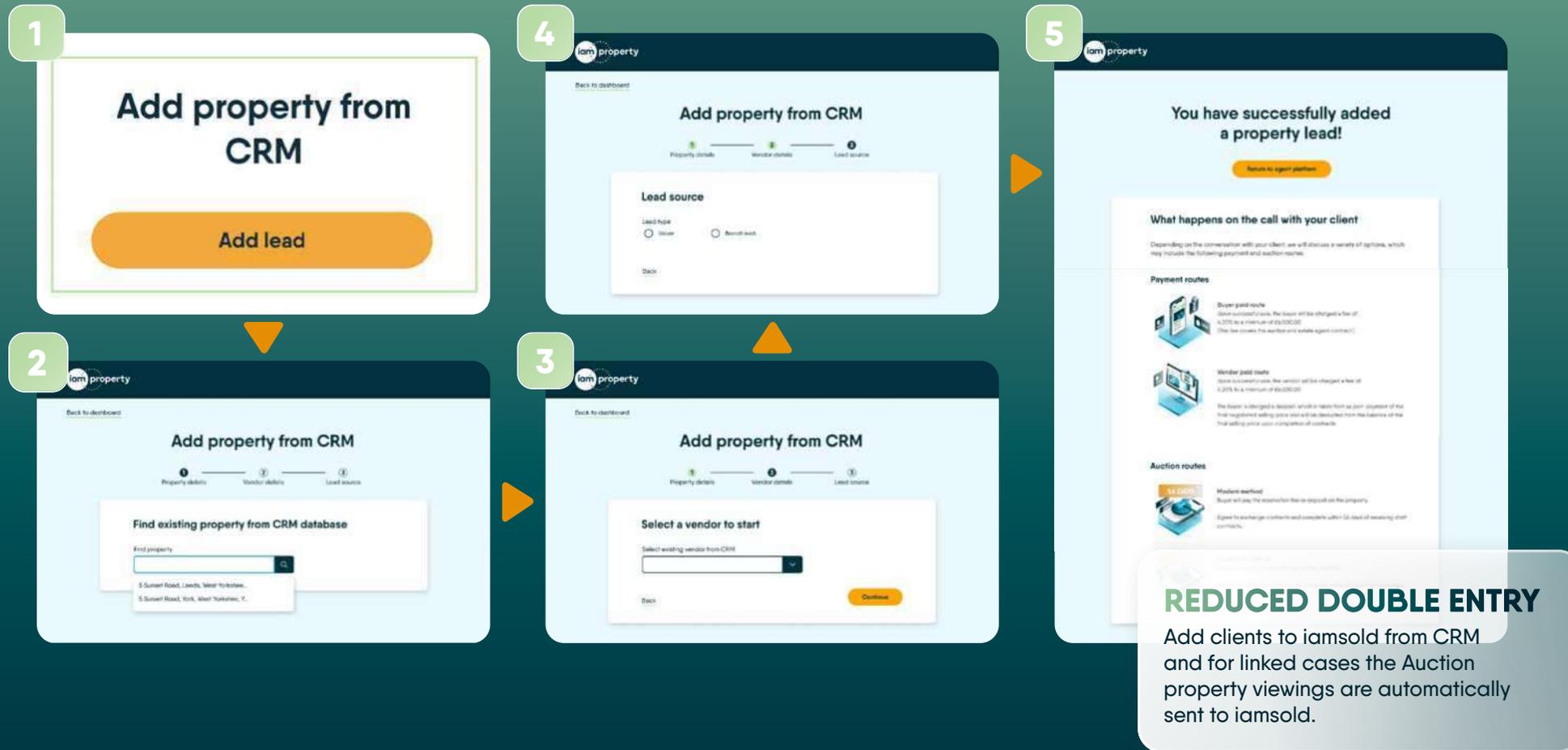+ Competitor Landscape

+ Target Audience

+ What our Agents Say

+ FAQs

+ Onboarding Agents

+ Ecosystem Solutions

TOOLS TO SUPPORT OUR AGENTS

To maximise the success of their new Auction service our Partner Agents will have access to a variety of support tools and resources to help educate their staff and clients.

Here is a quick reminder of what our agents can enjoy:

+ Faster, 7-day payments*

+ **50%** margin

+ A market-leading Auction platform

+ Dedicated Account Management team and an Auction success plan

+ Regular branch incentives and competitions as well as per-sale rewards

+ Access to the Success Hub - a dedicated learning & development platform

+ Access to the Marketing Library and Marketing Toolkit for tailored branded assets

+ Branded Auction microsite

+ Ongoing training tailored our agents personal needs

+ Access to our Facebook Agent Partner page for exclusive updates and insights

* From receipt of auction fee. Must qualify. Not applicable to caveated or £400k+ properties.

Marketing library
To help our agents promote their new Auction service, they can access our marketing library service. Our template-based assets can be tailored to their agents brand and include everything from window stickers and promotional leaflets/guides to social media and web banners.

Staff incentives and rewards
We run incentive programmes to reward our agents, with prizes and vouchers to help them feel motivated to drive sales.

Success Hub
As well as set-up and comprehensive training, our agents get access to a dedicated account team, Auction Specialist and access to our Partner Agent Success Hub. This offers bite-sized training and support to help our agents grow their Auction service.

Helping you win more instructions
Our dedicated consumer website will help drive leads for our agents. By driving customer demand with high impact campaigns and highlighting properties that may be suitable for Auction, they can boost their portfolio and save valuable time.

Facebook partner page
We encourage all of our agents to join our Facebook partner page to keep them updated on exclusive updates and insights from iamproperty and feel part of our community.

Complimentary access to the Marketing Toolkit
Our agents can power up their Auction prospecting and win more instructions with our Marketing Toolkit.
Agents can use triggered campaigns to highlight the advantages of Auction to homes that haven't sold in 16 weeks or that have recently fallen through.

- Auction
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- + Ecosystem Solutions

AUCTION COMPETITOR LANDSCAPE

AUCTION

- SDL
- Pattinson
- Alsop
- BIDX1
- GOTO Group
- Offr
- Auction House
- Bamboo auctions
- Pugh and CO

TRAINING & SUPPORT

PREMIUM CONVEYANCING
AUCTION
AUCTION CONVEYANCING
MARKETING TOOLKIT
CONVEYANCING LEADS
MORTGAGE LEADS
PROSPECTING
SURVEY REFERRALS
MARKET APPRAISAL
COMPLIANCE CHARGING
LEAD MANAGEMENT
AML COMPLIANCE
SALES & LETTINGS CRM
MATERIAL INFORMATION
PROPERTY MANAGEMENT
TITLE INSIGHT REPORT
PRE-TENANCY ONBOARDING
SOURCE OF FUNDS
AUTOMATION
CLIENT PORTAL
ACCOUNTS

SPEED & SECURITY
BUILD REVENUE
GENERATE LEADS
REDUCE RISK
STREAMLINE YOUR DAY

iam property
Ecosystem

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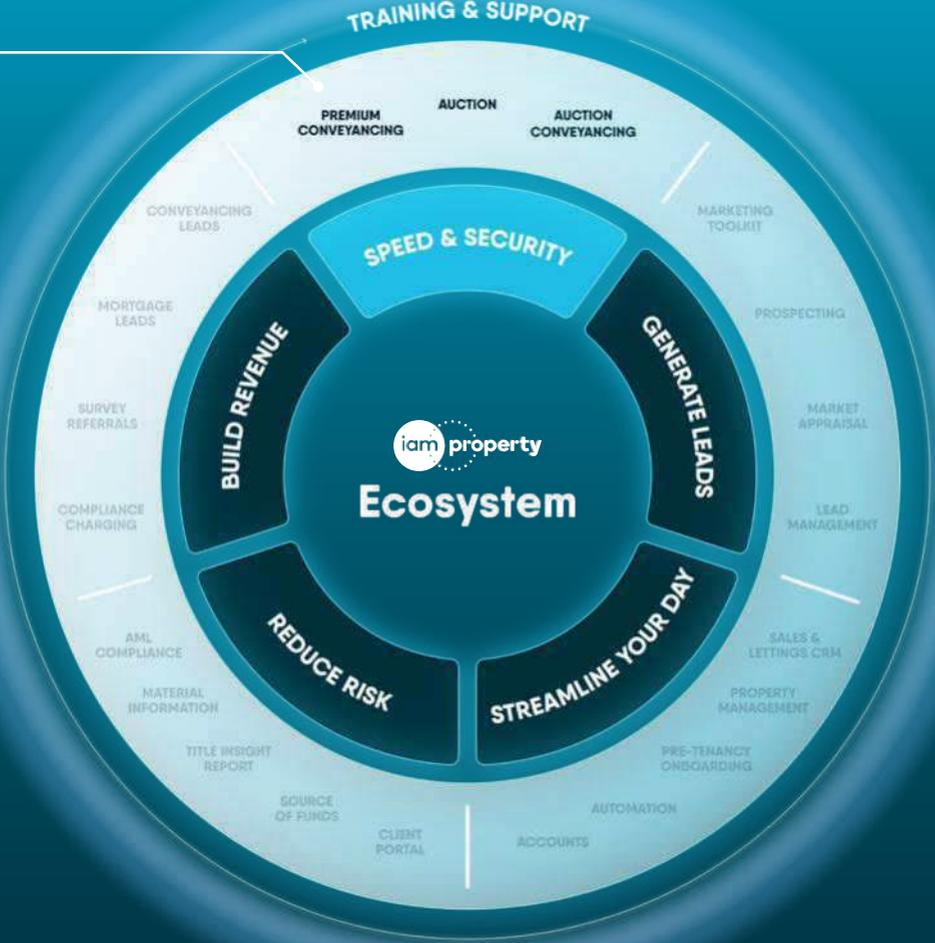- What our Agents Say
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AUCTION KEY COMPETITORS

KEY
- 🟩 Comprehensive Offerings
- 🟥 3rd party integration

	iamproperty	SDL Property Auctions	Pattinson	BIDX1	Allsop	Auction House	Pugh & Co Auctions	Rocket Auctions	Goto
Modern Method of Auction	🟩	–	🟥	–	🟥	🟥	–	🟩	🟩
Traditional Auction	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟩
Compliance and AML	🟩	🟩	🟩	🟩	🟩	🟩	🟩	🟩	–
Conveyancing	🟩	–	🟩	–	–	–	–	–	🟩
Auction Finance	–	🟩	–	–	–	🟩	–	🟩	🟩
Online Auctions	🟩	–	🟩	–	🟩	🟩	🟩	🟩	🟩
Digital in-room Auctions	–	🟩	🟩	🟩	🟩	🟩	🟩	–	–
In-room Auctions	–	🟩	🟩	–	–	🟩	–	–	🟩

SDL Property Auctions

SDL Property Auctions is the UK's most successful live-streamed auctioneer, selling hundreds of lots every month in our National Property Auctions and daily Timed Auctions.

Product overview

+ Once the lead is sent they do the rest
+ Auction finance options
+ Commercial lots
+ Valuations
+ Legal pack production
+ Logo and enquiry link to agent listing
+ White labelled platform
+ Training

seller fees

Buyer fees:
Unconditional: 10% deposit (min £5k) + £1,074 fee within 15 days or Deposit 5% or £5k, fee 4.8% < 250k, 3.6% > £250k – min £6k

Strengths

+ Large business outside of Auction with the wider group
+ Proactive marketing
+ 7-day payment terms
+ 1.5-2% fee and offer more in L2S £150 vs. our £100

Weaknesses/How we win

+ Quality of service and staffing
+ Traditional Auctions only
+ Lower levels of conversion
+ Poor live events – the quality of stock, attendees, etc.
+ Quality of leadership team
+ Only timed Auctions with some unsold lots

Agent referral fees

+ Agent payments
+ Auction referral income 1.5%-2% (min 2.5k)
+ Terms 7-days of sales agreed
+ Personal rewards

Product comparison

	SDL	iamproperty
Modern Method of Auction	–	●
Traditional Auction	●	●
Compliance and AML	●	●
Conveyancing	–	●
Auction Finance	●	–
Online Auctions	–	●
Digital in-room Auctions	●	–
In-room Auctions	●	–

Kill points

+ Loyal customer base with higher rewards
+ Large supporting business

KEY
● Comprehensive Offering

Pattinson Auction

Take the stress out of selling your property – let the biggest Estate Agent in the North East do the work.

Product overview

+ 0% selling fees
+ White labelled auction tab
+ Incentives
+ Competitive fee structure
+ Referral tool that works with most leading web-based CRMs
+ Branded marketing
+ Training sessions held across the UK

Buyer/seller fees

+ Unconditional Buyers: Deposit 10% min of £3,600 or 5% Deposit and 5% Res Fee (min 5k+VAT) Booking fee: 0 or 5% (min £5k)
+ Conditional: Admin fee of £780 (inc. VAT) or Reservation Fee 5%+VAT (min of £5k+VAT). £3.6k deposit. Reservation fees – £780/5% (min £5k+VAT)

Strengths

+ Offer commission of up to 2.5%
+ Strong growth
+ Claim <1% fall-through rate

Weaknesses/How we win

+ Quality of leadership team
+ Competing with partner agents
+ Website tech seems old/glitchy
+ Social presence is very poor
+ Focus on Traditional Auction
+ Trustpilot score low – with 13% "Bad" with complaints about misleading, pushy sales and lack of communication being prominent

Agent referral fees

+ Auction referral income: up to 2.5% (min £2.5k)
+ Paid on exchange
+ Personal rewards "Refer to win prizes" £100 for every referred property. Or if referred by Pattinson to partner agent £50 voucher

Product comparison

	Pattinson	iamproperty
Modern Method of Auction	●	●
Traditional Auction	●	●
Compliance and AML	●	●
Conveyancing	●	●
Auction Finance	–	–
Online Auctions	●	●
Online timed Auctions	●	–
Digital in-room Auctions	●	–

Kill points

+ High fees and a strong claim on a fall-through rate of <1%
+ CRM integration from most leading web-based CRMs

KEY
● Comprehensive Offering

- Auction
  - iamproperty
  - Proposition
  - Understanding Auction
  - Features
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- Ecosystem Solutions

allsop

We are the UK's largest and most successful property auction house and also offer an extensive range of consultancy services for residential, commercial and mixed-use property.

Product overview

+ Residential and commercial auctions
+ Unconditional in-room and online auctions on fixed dates
+ Offers video tours
+ App:
  • Current catalogues
  • View lot lists offline
  • Access legal documents online
  • Watchlist
  • Make private notes against lots on your Watchlist

Buyer/seller fees

Bidder security payment:

+ Guide Price: £1-£49,999 = £2k per lot
+ Guide Price: £50,000-£149,999 = £5k per lot
+ Guide Price: £150,000 = £10,000 per lot + balance of deposit (10% or £2k) + £1.25k admin fee.
+ Booking/admin fee £1.25k | £2k-10k

Strengths

+ App
+ Large number of commercial properties as well as residential listings
+ History and experience
+ Larger offering within group

Weaknesses/How we win

+ Limited messaging to promote the service
+ Focus on timed and traditional auctions

Agent referral fees

+ Unknown

Product comparison

	allsop	iamproperty
Modern Method of Auction	✅	✅
Traditional Auction	✅	✅
Compliance and AML	✅	✅
Conveyancing	-	✅
Auction Finance	-	-
Online Auctions	✅	✅
Digital in-room Auctions	✅	-
In-room Auctions	-	-

Kill points

+ End user app available for bidding and wide range of commercial as well as residential properties

KEY
✅ Comprehensive Offering

Auction

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BidX1.

Your Digital Property Investment Platform. We're changing the way property is bought and sold, making the process more transparent, efficient and easy for our users. Let us show you how the digital platform works.

Product overview

+ Real-time data on everything from bidder profiles to investment trends
+ Best-in-class marketing
+ Fully digital sale process and App
+ International properties

Buyer/seller fees

+ Bidding deposit £3,500, admin fee £1,250, joint agent £2,400 + remainer of 10% deposit.
+ Full deposit is 10% (min £3.5k)
+ Booking fees £1.2k-£2.4k

Strengths

+ Achieved 90% success rate 2020
+ Online bidding via App
+ International reach
+ 2020 doubled sales to £180m, 320 in 2020
+ Strategic partnership with Foxtons accounted for more than 50%of the sales
+ Good platform

Weaknesses/How we win

+ Pay upfront bidding security deposit, which can take days to come back if not successful
+ Only offering traditional method
+ Seller fees are applied as well as buyer fees
+ Website highly targeted to corporate style individuals which limits its reach

Agent referral fees

+ Auction referral income
+ Terms
+ Personal rewards

Product comparison

	BidX1	iamproperty
Modern Method of Auction	–	▬
Traditional Auction	▬	▬
Compliance and AML	▬	▬
Conveyancing	–	▬
Auction Finance	–	–
Online Auctions	–	▬
Digital in-room Auctions	▬	–
In-room Auctions	–	–

Kill points

+ Strong technology, with an App
+ Fast growing company internationally

KEY
▬ Comprehensive Offering

Navigation

🏠 **Auction**
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+ **Competitor Landscape**
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+ Ecosystem Solutions

Auction House

We operate auction rooms across England, Wales and Scotland. Each of the Auction House members are well respected and experts in their region. This means they can personally carry out valuations on your property, with full knowledge of the surrounding area.

Product overview

+ Seems like agents manage their own process apart from the auction itself

/seller fees

+ Buyers fee (example 100k guide price = £1.2k) and/or buyers premium 1.2% min £2.7k
+ Admin fee £1.2k+ admin charge (example £1.2k–£1.8k) + 10% Deposit (min £3k)
+ Booking fee £1.2k &/ 1.2% (min £2.7k) &/ £1.2k

Strengths

+ 35 auction houses
+ Offer both in room and online auctions
+ Growth of 37.9% 2021 from £439,705,781 to over £600 million
+ More online users 1.6m (pre-pandemic) to 2.4m (2021)
+ Increasing younger age ranges

Weaknesses/How we win

+ The focus is largely on Traditional Auction
+ Asks for both selling and buying fees
+ They are competing with their agent customers

Agent referral fees

+ 50% commission

Product comparison

	Auction House	iamproperty
Modern Method of Auction	Comprehensive Offering	Comprehensive Offering
Traditional Auction	Comprehensive Offering	Comprehensive Offering
Compliance and AML	Comprehensive Offering	Comprehensive Offering
Conveyancing	–	Comprehensive Offering
Auction Finance	Comprehensive Offering	–
Online Auctions	Comprehensive Offering	Comprehensive Offering
Digital in-room Auctions	Comprehensive Offering	–
In-room Auctions	Comprehensive Offering	–

Kill points

+ Regional auction hubs selling "local"

KEY
Comprehensive Offering

Pugh | Part of Eddisons

Pugh & Co is UK's leading property auction firm, combined with over 25 years' dedicated auction experience. Offering our clients expert advice, maximum market exposure, value for money, impressive auction venues and one of the highest sales success rates in the UK.

Product overview

Partner platform:
+ Partner portal
+ White labelled microsite
+ Bespoke flexible agreements
+ Reward vouchers
+ Minimum commission £2.5k
+ Sales boards – with Pugh and co details

Auction service:
+ Unconditional
+ Commercial and domestic properties
+ Fixed auction days on site
+ If unsold market for a further 8 weeks

/seller fees

+ Sellers fee: 2% or £2,000 fee
+ Buyer fee: 1.5% or £2,000 fee
+ Booking/admin fee: 1.5% (min £2k)

Strengths

+ Wider group offering extra security
+ £150 Love2Shop vouchers
+ Marketing materials
+ Min £2.5k commission
+ RICS approved auction house with 25 years experience
+ Tailored service (including fees structure)

Weaknesses/How we win

+ Traditional Auctions only
+ Fees for both buying and selling
+ Competing with Estate Agents on both auction
+ Fixed auction sales start and end dates
+ No auction packs offered
+ Nov 21–Jan 22 only 51% of properties sold, 13% postponed, 29% Unsold and 8% withdrawn

Agent referral fees

+ Auction referral income – 50% of the 3.5% fees – min £2.5k
+ Terms – 2 weeks of exchange of contract
+ Personal rewards – £150 Love2Shop vouchers

Product comparison

	Pugh	iamproperty
Modern Method of Auction	–	▬
Traditional Auction	▬	▬
Compliance and AML	▬	▬
Conveyancing	–	▬
Auction Finance	–	–
Online Auctions	▬	▬
Digital in-room Auctions	▬	–
In-room Auctions	–	–

Kill points

+ 25 years of experience and offers decent referral rewards of £150 Love2Shop vouchers

KEY

▬ Comprehensive Offering

Auction
+ iamproperty
+ Proposition
+ Understanding Auction
+ Features

Competitor Landscape
+ Target Audience
+ What our Agents Say
+ FAQs
+ Onboarding Agents
+ Ecosystem Solutions

< >

ROCKET AUCTIONS

My Auction, the online auction specialists has merged with Bamboo Auctions to offer estate agents the ability to sell properties by online auction through Bamboo's technology platform. Following the merger, agents will be able to manage the auction process from start to finish, with additional help and support of qualified auctioneer.

Product overview

+ Rocket auction managed processes so agents can focus on cross-selling and new opportunities.
+ Built-In ID Checks, Payment Processing, Automatic document generation and Buyer Tracking.
+ Aim for completion in 40 days.
+ Integrated in agent website or list on Bamboo and Rocket auction's sites.
+ In-depth auction valuation report
+ Auction managed solicitors and estate agents
+ Full legal pack
+ Marketing through Rightmove and Zoopla, Bamboo
+ Auctions, and Essential Information Group, direct mail

Strengths

+ Integrations with Reapit and Alto
+ Auction properties integrated directly on the agents website
+ Promotes to a database of 50k buyers
+ Rightmove integration
+ Manages sale progression, auctions, admin, and checks

Weaknesses/How we win

+ No conveyancing services

/seller fees

+ No partner fee for auctions My auction - paid for service Auction fees, Agents choose the buyer fee % and minimum
+ Bamboo/Rocket take a cut Agents retain any seller fees.
+ RICS members get an additional £1,200 for each property sold online in addition to any vendor fee they charge.
+ Free to list but charges for different services

Agent referral fees

+ Auction referral income – 50% of the 3.5% fees - min £2.5k
+ Terms - 2 weeks of exchange of contract
+ Personal rewards – £150 Love2Shop vouchers

Product comparison

	MyAuction	iamproperty
Modern Method of Auction	●	●
Traditional Auction	●	●
Compliance and AML	●	●
Conveyancing	–	●
Auction Finance	●	●
Online Auctions	●	●
Digital in-room Auctions	●	–
In-room Auctions	–	●

Kill points

+ Integrations with CRMs

KEY
● Comprehensive Offering

- Auction
  + iamproperty
  + Proposition
  + Understanding Auction
  + Features
- Competitor Landscape
  + Target Audience
  + What our Agents Say
  + FAQs
  + Onboarding Agents
  + Ecosystem Solutions

![GOTO GROUP logo]

An end-to-end property solution on a single platform. Whether you need a survey, mortgage, conveyancing, removal, locksmith, auction, reservation fee, energy performance certificates, wills, legal search packs or more, we provide access to the most complete range of quality property products anywhere in the UK. There's nothing else like it!

Product overvw

+ Conveyancing
+ Surveys
+ Auctions (MMoA)
+ Mortgages
+ EPCs
+ Floorplans
+ Removals
+ Reservation Fee Option
+ Fee Option Cashback Option
+ Home Insurances

Strengths

+ Online MMoA platform
+ Offer of in-house financing with mortgage services
+ End-to-end moving services including insurance,
+ mortgage, removals, surveys

Weaknesses/How we win

+ No mention of compliance AML checks
+ Property search site redirects to agent sites
+ (auctions not hosted by GOTO site)

Pricing

+ No information found

Kill points

+ In-house Auction finance (mortgages)

Product comparison

	MyAuction	iamproperty
Modern Method of Auction	Comprehensive	Comprehensive
Traditional Auction	Comprehensive	Comprehensive
Compliance and AML	-	Comprehensive
Conveyancing	Comprehensive	Comprehensive
Auction Finance	Comprehensive	-
Online Auctions	Comprehensive	Comprehensive
In-room Auctions	-	-
Digital in-room auctions	Comprehensive	-

KEY
Comprehensive Offering

Auction
+ iamproperty
+ Proposition
+ Understanding Auction
+ Features
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+ Target Audience
+ What our Agents Say
+ FAQs
+ Onboarding Agents
+ Ecosystem Solutions

BUSINESS OWNERS/MD

"I've been in this environment all my career and there is nothing I do not know about running my business"

View Persona

Key messages

+ Partnering with iamproperty allows you to expand your services with our no cost Auction solution.

+ Auction is the perfect choice, with speedier sales and a clear and transparent process. With full control over the Reserve Price – it ticks all the boxes!

+ Acting as an extension to your team, we keep the transaction moving and all parties informed – freeing you and your team up to do what you do best.

+ Maximise pipeline turn and increase sales revenue with higher fees, 56-day completions, 95% success rates, and 7-day* payments.

Pain points	Counter comments
It's a challenging market, competition is increasing and fees are getting squeezed.	Auction offers higher fees than Private Treaty and additional staff incentives. It will allow you to provide additional sales methods that could give you the edge over your competitors.
High fall through rates directly impact my profitability.	Buyers and sellers show commitment through the reservation agreement, deposit and Reservation Fee giving a 95% completion rate compared with 70% for Private Treaty.
Private Treaty completion times are taking longer. If they fall through this a burden on my resources and costly.	With 28 or 56 completion timescales you can get the fees in your bank much quicker than with Private Treaty.
Auction sounds interesting, but I don't have the resources to offer this service.	Our dedicated team of Auction Specialists are here to support you throughout the process, we work as part of your extended team all you need to do is send us the referral and we can take care of the rest.
Auction...isn't that just the last resort?	Auction is becoming increasingly popular for a wide variety of buyers and sellers. Many buyers (nearly 40%) are buying for the property to be their primary residence. And with Modern Method of Auction it is now open for buyers purchasing with a mortgage increasing the market further. Auction sellers come from a variety of situations the one thing they have in common is they want security and speed. Within our Method of Sale Audit, 44%,of Private Treaty sellers, said they desire the same benefits as Auction.

OUR SALES OR LETTINGS VALUER

> "If I can spend quality time with people, I know I will help set the right price for them and I will get them on board"

View Persona

Key messages

+ iamproperty provides you with a new selling option to offer clients who want a speedy and secure sale.

+ Acting as an extension to your team, we keep the transaction moving and all parties informed, so you don't have to worry about sales progression and can focus on appointments and winning more instructions.

+ Drive revenue and get some great personal rewards like Love2shop vouchers.

+ Does your vendor need a quick/more secure sale? Talk to us about Auction!

Pain point	Counter comments
It's a challenging market, competition is increasing.	Auction will allow you to provide additional sales methods that could give you the edge over your competitors, giving you an option for clients that want additional speed or security...and you will get better fees and staff incentives.
Private Treaty is taking longer and longer times to complete, and if it falls through this is a waste of my time.	With 28 or 56 completion timescales you can get the fees in your bank much quicker than with Private Treaty. Buyers and sellers show commitment through the reservation agreement, deposit and Reservation Fee giving a 95% completion rate compared with 70% for Private Treaty.
I have targets to meet.	Our dedicated team of Auction Specialists are here to support you throughout the process, we work as part of your extended team, all you need to do is send us the referral and we can take care of the rest.
Auction... isn't that just the last resort?	Auction is becoming increasingly popular for a wide variety of buyers and sellers. It is more about the situation of the seller than the property. Within our movebutler in-platform Method of Sale Audit, many sellers, 44% said they desire the security and speed that auction brings. With 94% of people saying they would like to have a financial commitment from the buyer and 39% wanting to move within 3 months.*

- Auction
- + iamproperty
- + Proposition
- + Understanding Auction
- + Features
- + Competitor Landscape
- + Target Audience
- + What our Agents Say
- + FAQs
- + Onboarding Agents
- + Ecosystem Solutions

*Based on 3,000 vendor responses to the movebutler in-platform Method of Sale Audit

OUR SALES OR LETTINGS NEGOTIATOR

> " "My days are so varied but I have a great team around me and a system that works so I just ensure I keep on my to do list!"

View Persona

+ Does your client need to sell quickly? Or perhaps they've been disappointed by a Private Treaty sale fall through? Auction could be the answer!

+ Don't lose a client because you can't sell quickly or securely through Private Treaty... there is another way.

Pain point	Counter comments
When things fall through it can be very stressful dealing with frustrated clients.	Buyers and sellers show commitment through the reservation agreement, deposit and Reservation Fee giving a 95% completion rate compared with 70% for Private Treaty. Plus we offer a dedicated team of Auction and Completion Specialists to support you and the client throughout the entire process.
I have targets to meet.	It's a simple process, all you need to do is send us the referral and we can take care of the rest.
Auction... isn't that just the last resort?	Auction is becoming increasingly popular for a wide variety of buyers and sellers. Many buyers (nearly 40%) are buying for the property to be their primary residence. And with Modern Method of Auction it is now open for buyers purchasing with a mortgage increasing the market further. Our sellers come from a variety of situations the one thing they have in common is they want the increased security and speed that Auctions bring.

SELLER

Key messages

+ Quicker vs Private Treaty, from sale to complete in 28 or 56 days.

+ Committed buyer, less chance of the buyer pulling out.

+ No agency fees.

+ No Sale No Fee Auction conveyancing options.

+ Transparency, you can see bidding activity and competitive bidding can drive up the price.

+ MMoA gives you more time (56 days) to arrange your move.

> "
> "My previous sale has fallen through and my current agent hasn't any other options so I thought I would shop around"

Pain point	Counter comments
I am mistrusting of Estate Agents and fees, and I don't want any time wasters.	We offer an alternative method that is quick and secure, with 0% agency fees.
I don't want to pay fees.	Our zero commission offer means you won't have any fees to pay, the buyer pays a Reservation Fee meaning you don't have to.
I've had sales fall through.	With 95% completion rate compared to 70% for Private Treaty, Auction is a much more secure option. The buyer pays a deposit or Reservation Fee so you know they are serious about the sale. It is also quick with 28 and 56 day options so you can get back on track sooner.
My property has been on the market for a long time.	Auction offers 28 & 56 day completion timescales, meaning that you will be able to get moving quicker, and there is a vastly reduced chance of the sale falling through.
I don't want my property to be undersold.	Our undisclosed reserve price means you won't sell for less than you want and attractive starting prices can drive up interest and competition, promoting competitive bidding from potential buyers.

BUYER

Key messages

+ Quicker vs Private Treaty, from sale to complete in 28 or 56 days.

+ More security less chance of the seller pulling out.

+ Transparency, you can see bidding activity.

+ MMoA gives you more time (56 days) to arrange a mortgage and your move.

Pain point	Counter comments
I am mistrusting of Estate Agents.	Auction is a transparent process, all the property information is available upfront so you can fully review the property you are interested in. You will also get full transparency over bidding, so you can offer up to where you are comfortable with, with complete confidence if you are the highest bidder, unlike with sealed bids on Private Treaty sales.
I've had a sale fall through.	With 95% completion rate compared to 70% for Private Treaty, Auction is a much more secure option. You will enter into a reservation agreement with the seller meaning if they pull out they are liable for the Reservation Fees.
I want a good deal on a property.	There are a wider variety of property types and conditions available at Auction, and with transparent bidding, you will only have to bid up to the amount you are comfortable with, no need to put forward an inflated offer in sealed bids to secure your dream property.
Aren't all auction properties run down?	The variety of properties available at Auction is becoming much wider, MMoA in particular, offers anything from fully renovated houses and flats, family homes, as well as properties that may require a bit of work.
I am buying with a mortgage, don't you need cash to buy at auction?	Modern Method of Auction gives you an extended time of 56 days to allow you time to arrange a mortgage while still offering the transparency and security of Auction.

"I have never bought property via auction before so, understandable was a little apprehensive. The Auction Specialist I dealt with was extremely professional and knowledge was second to none, making the entire process simple and hassle free. I grabbed myself a bargain and would, without doubt purchase further properties in the future via auction."

WHAT OUR AGENTS SAY

> "The Auctions have been excellent, and we've had some huge success stories and some fantastic prices for our clients."

Nigel Cooke,
Managing Director, Cooke and Co

> "We like the Auction service as it gives our clients a different approach when they're looking for a speedy and secure sale"

Stuart Matthews,
Managing Director, Miller Metcalfe

> "iamproperty has given me another opportunity to be able to present clients with a different kind of service and one that really suits their needs. This means not just going down the normal route of selling a property but also providing them with the option of Auction. It's really helpful and lovely to be able to stand out."

Holly Price,
powered by eXp

ACCELERATING AGENT SUCCESS

We are building partnerships and collaborating with Estate Agents to offer digital onboarding experiences that will delight our Agent clients at every stage. Hear from some of our Partner agents about how working with iamproperty is helping them to succeed.

John Nicholson
Managing Director
Dowen Sales & Lettings

Press play to listen to our Partner Agent

▶ **Watch more agent case studies**

- Auction
- + iamproperty
- + Proposition
- + Understanding Auction
- + Features
- + Competitor Landscape
- + Target Audience
- + What our Agents Say
- + FAQs
- + Onboarding Agents
- + Ecosystem Solutions

PARTNER AGENTS WORKING WITH US

1. **How do our agents get paid?**

   The negotiator and valuer leads will receive their 'Auction Referral Fees' and any agreed personal rewards will be paid in accordance with our agents agreed terms, this is usually within **7 days** after the sale has been agreed or in line with monthly scheduled payment dates.

2. **Auction fees paid**

   For each successful auction referral our agents will receive 50% of the reservation fee, typically a minimum of £2,500 excluding VAT.

3. **How do our agents claim their rewards?**

   On the iamsold dashboard, there is an available balance and a link to claim rewards. These can be saved up over time and redeemed when they need them.

4. **How do agents get Auction advertising customised for their branch?**

   We have a library of marketing asset designs on our "Order marketing" page on the iamsold dashboard as well as the "marketing template library" with the Marketing Toolkit. Each one of these can be customised to preferred size and branding by our agents submitting the form on the design they want. We then will send this back to the agent via email in the format they have requested.

5. **How do agents request design updates to their microsites?**

   If agents need any changes on their microsites, they need to contact marketing@iamproperty.com with their request and the iamproperty team will make the relevant updates.
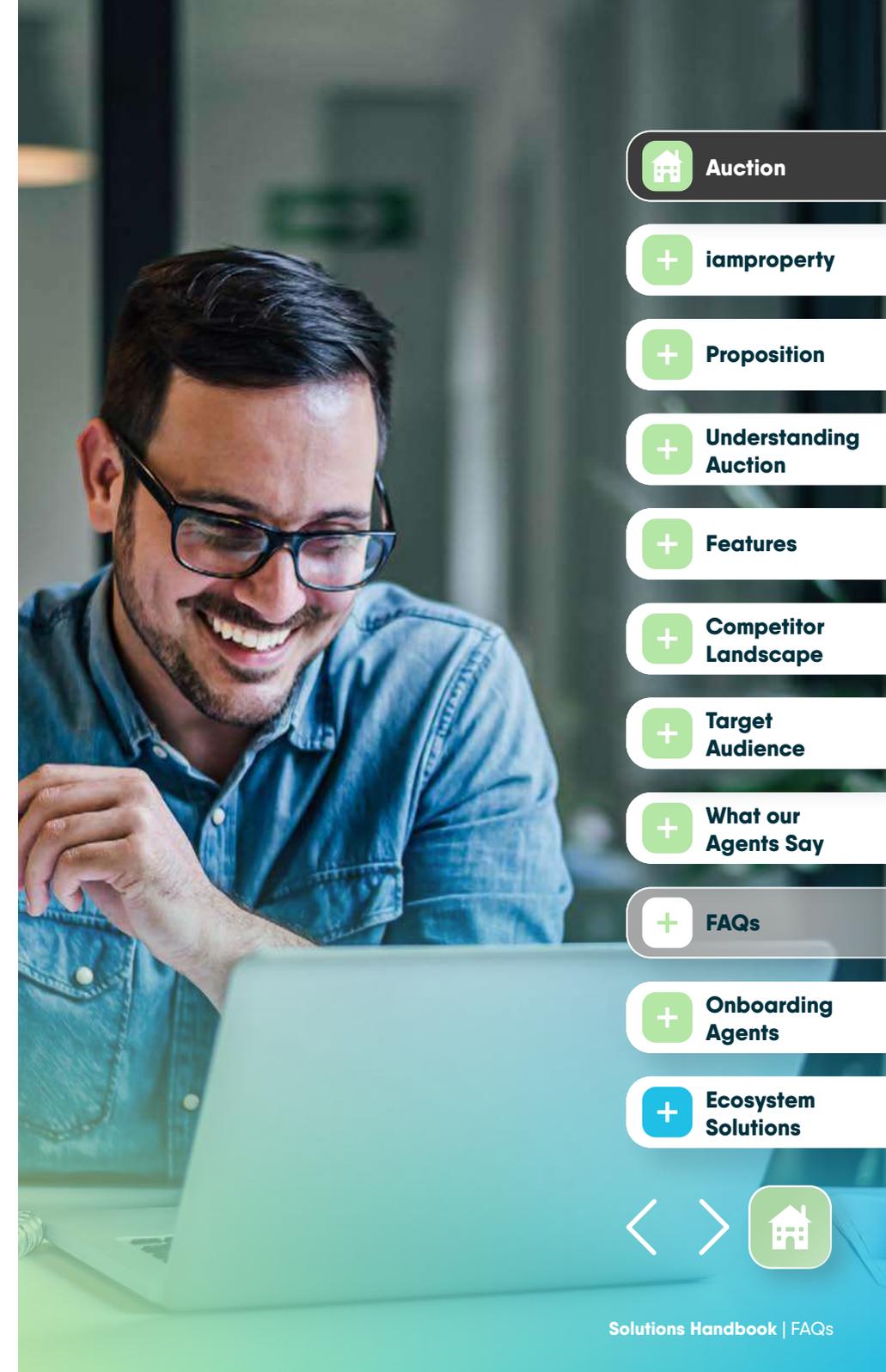
Auction

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Proposition

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Ecosystem Solutions

SELLING AT AUCTION

1. When does the Auction take place?

When there is a bidding phase it will be after the Auction Pack is completed and when there is sufficient interest in the property. A buyer can make a bid at any time and may be able to secure the property without it going into the bidding phase.

2. What is included in the Auction Pack?

- + Title Register and plan
- + Local searches
- + Water and drainage
- + Property information forms
- + Fixtures and fittings
- + Probate, epitome of title, POA (if required)
- + EPC
- + We are also happy to provide our buyers with any extra information they may need at request

3. How is the Auction pricing determined?

The Reserve Price is determined by the minimum amount that the vendor is prepared to walk away with. They are protected by this figure and do not need to accept any offers below it. This offers sellers a level of protection and peace of mind.

When setting the Reserve Price, the vendor must consider that the buyer will pay a Reservation Fee on top of the Purchase Price. The Starting Price can then be set anywhere up to 10% below the Reserve, this helps to drive interest and encourage competition.
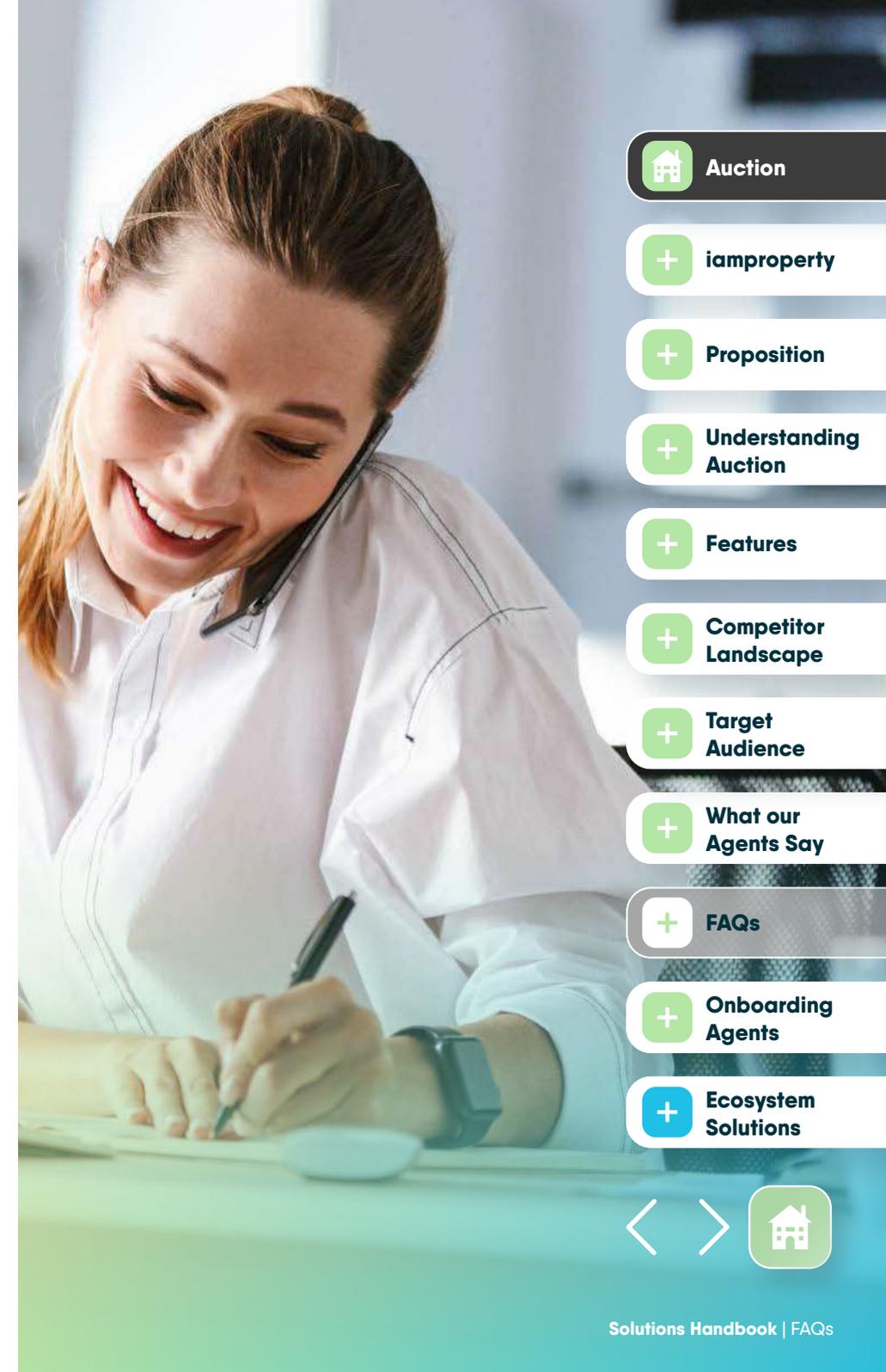
4. How does MMoA help the seller optimise their sales price?

The price point is positioned to maximise interest in the property increasing the number of potential bidders, we will always try to get as many interested parties as possible before we set the Auction live. Transparent bidding then encourages competitive offers as each party doesn't want to miss out, and if a bid is received in the last 2 mins, the timer resets to 2 minutes, so each party has the chance to place a counter bid to maximise the final Selling Price.

5. Who is suited to selling at auction?

Auction is suitable for various scenarios or properties. However, if the property is unlikely to be able to get a mortgage due to its condition, Traditional Auction may be preferable.

We can advise on the suitability of clients for Auction and the best terms for our agents clients on a case-by-case basis.

BUYING AT AUCTION

1. Why would a buyer pay a fee in addition to the purchase price?

A buyer will factor the Reservation Fee into the price they will pay for the property. In doing so, the buyer will benefit from a faster completion time vs Private Treaty, commitment from the vendor, and transparency via the Legal Pack and visibility of other bids on the property.

2. Is it always the highest bid that gets accepted?

Once the Auction has gone live, the highest bidder will be the one that gets accepted, providing this is above the sellers Reserve Price.

3. Is the bid binding?

Our sales methods are designed to provide both the buyer and seller with confidence that a sale will proceed with a reduced risk of fall-through.

With Modern Method of Auction, the bid obliges the buyer to pay a Reservation Fee and sign the Reservation Agreement to obtain exclusivity for the reservation period. It does not bind them to buy the property but reserves buyers the right to exchange contracts and complete on the property at the agreed price within 56 days of draft contracts being received by your Solicitors. If the buyer pulls out of the sale they will lose the non-refundable Reservation Fee.

With the Traditional Method of Auction, once a buyers bid has been accepted, or the Auction has been won, the buyer and seller exchange contracts and pay a 10% deposit alongside the Reservation Fee. Completion is then generally expected within 28 days. If the buyer pulls out they will lose their non-refundable Reservation Fee, the deposit and can be held on breach of contract and can be pursued by the seller for costs and penalties.

4. What happens if the seller withdraws after the sale is agreed?

The seller also commits to the sale, therefore if they were to withdraw, any fee/deposit the buyer had paid would be refunded to them and the seller would be liable for the fee.

5. What happens if the buyer does not meet the 56-day timescales?

This depends on the reason for the timescales not being met. If it is due to circumstances outside the buyer's control, then iamsold will discuss an extension to the 56 day timescales with the vendor but this is looked at on a case by case basis.

6. What if the buyer only has enough funds available for their deposit?

Our Auction Specialist will discuss other methods available. The vendor may agree to pay the fee and this could be added to the final purchase price.

7. Can buyers buy with finance?

MMoA has an extended timescale of 56 days to allow buyers time to arrange a mortgage. This is a popular way to finance these purchases with nearly half of our Auction properties last year being funded by a Mortgage.

However, we advise that they start this process early getting an offer in principle in place before they bid. Specialist Auction finance is available.

8. What if a buyer is concerned about a bad survey/down valuation?

The buyer can ask for a caveat to protect them against foreseen challenges. In this instance, if the vendor would not renegotiate following a down valuation, then the buyer could withdraw from the sale and their fee would be returned. The Auction Specialist will discuss this with the purchaser and the vendor.

9. How does the buyer access the Auction Pack?

The viewer will be sent a link automatically when they book a viewing on the property. This can also be accessed by logging into your iamsold account.

Auction

iamproperty

Proposition

Understanding Auction

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Competitor Landscape

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Ecosystem Solutions

AGENT ONBOARDING JOURNEY

Supported by our dedicated Account Management team and on-demand training we'll boost our Agents confidence so they can take their buyers and sellers through the Auction process.

Welcome

We'll get to know our new agent and their agency, introduce them to their supporting team and the way we work.

Knowledge

Next, we'll share everything they need to know about Auction services. This includes information on our people, our Auction services and the support tools agents have at their fingertips to help them succeed, such as the Marketing Library and Success Hub for all their training needs.

Performance

After the agent has completed their training, we'll work with them to design an Auction success plan to help them get the most out of the partnership.

Success plan agreed

Contract signed

Welcome call

Auction launch

Branch visits with Key Account Manager and Auction Specialist

Month 6 Plan review with Key Account Manager

Month 3 Plan review with Key Account Manager

Month 1 Plan review with Business Development Manager and Key Account Manager

Onboarding graduation

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We hope you find the iamproperty Solutions Handbook a valuable insight tool to help you understand our ecosystem of solutions.

iamproperty

Marketing Toolkit

CRM

movebutler

Auction

iam property