



How CompassRock Uses **Vantify Risk Manager**

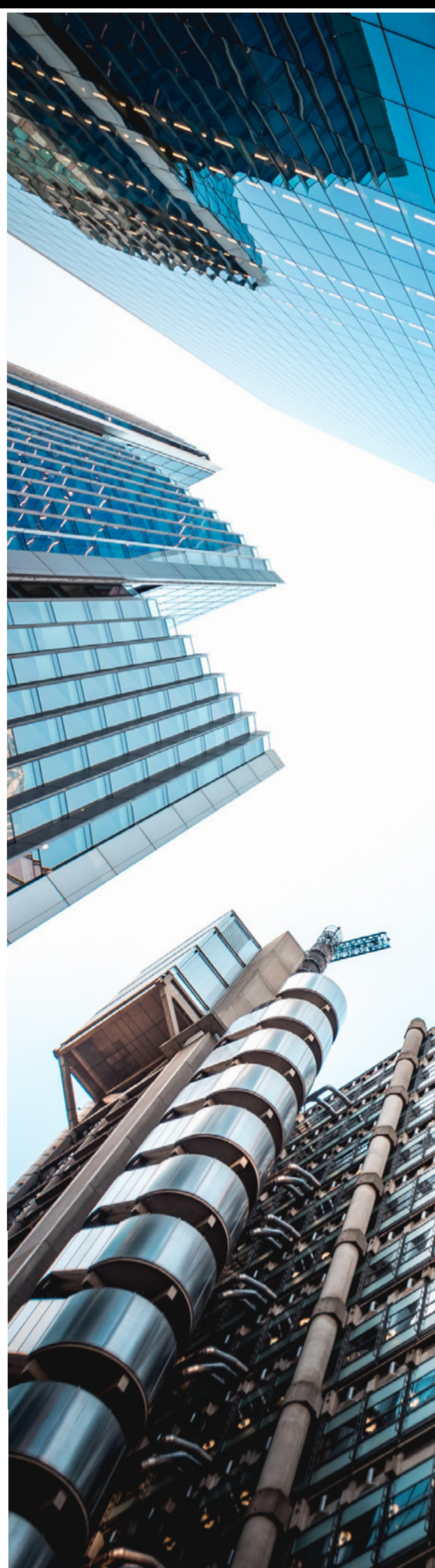
CASE STUDY



How Compass Uses Vantify Risk Manager to Simplify Risk Management in Property and Asset Operations.

CompassRock specialises in residential rental services, focusing on managing properties from both an asset and property management perspective. With extensive experience across a wide range of housing sectors, including build-to-rent (BTR), multifamily, co-living, student housing, single-family rentals, senior/retirement and affordable housing, the team has decades of hands-on expertise in managing some of the world's largest and most iconic properties.

For CompassRock, ensuring maximum compliance with health and safety standards is of the utmost importance and critical throughout their entire offering.



Spotlight on Grace Morgan – Director of Operations



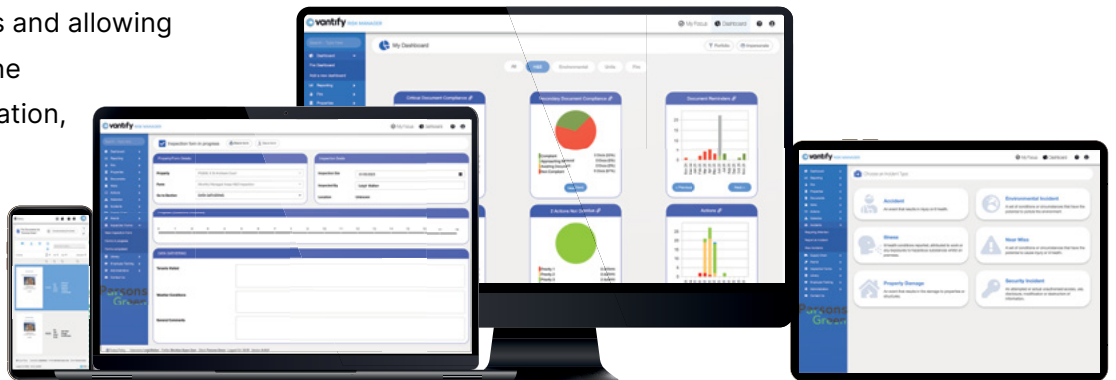
In her role as Director of Operations, Grace Morgan is responsible for maximising the Net Operating Income of their portfolio, whilst ensuring customer satisfaction and overseeing the company's compliance efforts, with a responsibility for CompassRock to meet its obligations as a landlord to residents. She also ensures that safety standards are upheld, both for residents and the buildings themselves, maintaining the security of the properties under CompassRock's stewardship. With a background in strategic procurement and mobilisation working with industry leaders such as JLL, Greystar and iQ Student, Grace handles procurement activities for CompassRock that are crucial in supporting the company's health and safety initiatives.

To address the potential administrative challenges of bearing such an obligation to their residents, CompassRock implemented Vantify Risk Manager, a centralised platform designed to streamline property and asset management processes.

Having everything in one place, including SOPs, safe systems of work, and policies, ensures there's one clear source of truth, meaning everyone is on the same page. This prevents reliance on individual team members to house information and helps avoid navigating complex file shares and other cumbersome systems.

Grace Morgan,
Director of Operations, CompassRock

The system served as a single source of truth, aligning all stakeholders and allowing them to easily access the most up-to-date information, which in turn improved efficiency. Grace also states Vantify Risk Manager has proven useful for tracking all those statutory compliance elements as well as best practice measures that aren't necessarily required by law but are expected from a best practice perspective.



We use Vantify Risk Manager to track our internal risk assessments, as well as the larger risk assessments that we outsource. For example, we conduct an annual fire safety risk assessment and a biannual water hygiene risk assessment, both performed by external specialists. The documentation for these assessments and any resulting actions are tracked in Vantify Risk Manager.

Grace Morgan,
Director of Operations, CompassRock



I'm not aware of any other health and safety platforms that offers the same level of flexibility. Not only does it track documentation, but it also allows for the creation of dynamic actions based on that documentation.

Grace Morgan,
Director of Operations, CompassRock

Why is Facilities Management so important in the Property Sector?

Grace believes it's incredibly important in property and asset management to have all teams: corporate, site, and third-party, working together towards one unified "single point of truth, *"This means having one live system that captures everything happening, including both statutory requirements and best practices from all stakeholders, whether internal or external."*

Vantify Risk Manager has granted CompassRock with more visibility and better control, which is especially useful as they are looking to implement systems and procedures that prepare them for a multi thousand-unit portfolio. Vantify Risk Manager will play a key part in onboarding new properties into their portfolio due to the effectiveness of the product.



What made CompassRock choose to use Vantify Risk Manager?

While other database systems and web portals could track documents, the real challenge often came when it was time to create actions from those documents. For example, if there's a planned preventative maintenance visit on a lift, the engineer might inspect it and say, *"Everything looks fine, there's was no immediate emergency, but I recommend changing the buttons or adjusting the ropes slightly."*

If a document repository was used, that recommendation would just sit there with no follow-up. In contrast, CompassRock noted, with this system, the recommendation triggers a remedial action, allowing either the site or corporate team to decide whether or not to act on it. It is this proactive approach that means important recommendations are acted upon.



How did you find the onboarding process?

Grace found the onboarding process easy and appreciated the support that was offered around its implementation.

“The onboarding process was fantastic, and we continue to have a very strong relationship with Richard Brown. He has been exceptional, probably the best software mobilisation person I’ve ever worked with in my career. Richard is incredibly helpful, and in addition to his deep technical knowledge, which you would expect, he also has the ability to contextualise our requests specifically to our portfolio and job role.”

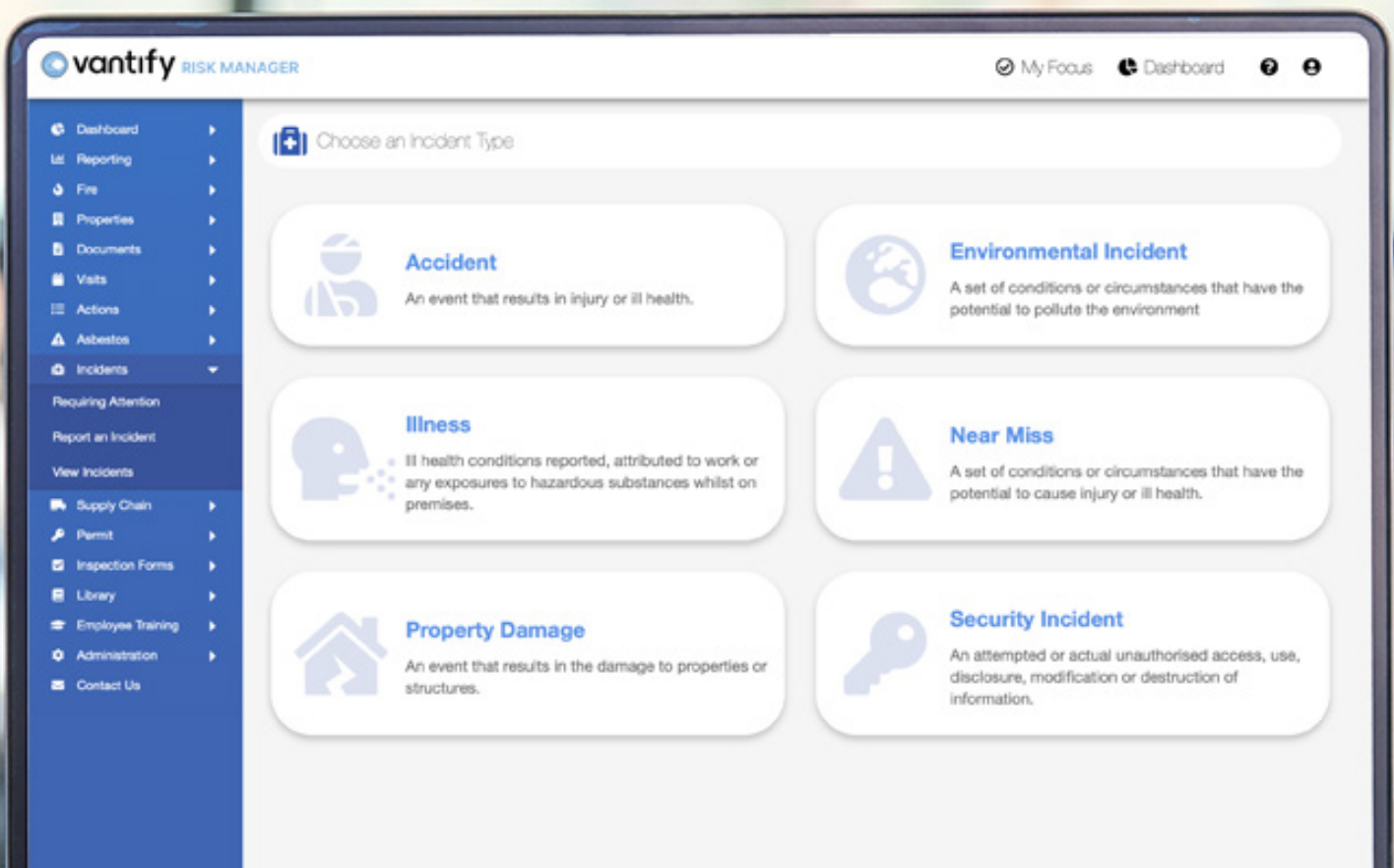
What are CompassRock’s key goals for the future using Vantify Risk Manager?

CompassRock are exploring the forms section in Vantify Risk Manager, specifically the inspection forms.

“While it’s not necessarily a health and safety tool, the great thing about Vantify Risk Manager is that you can fully customise the form section. I’ve used it to build a simple property inspection form that’s easy for anyone to fill out during a site visit to capture feedback.”

Grace notes that Vantify Risk Manager is especially useful in terms of those who may not spend much time at the property. *“It’s like when you notice a scuff on the wall at someone else’s house, but not your own. We want to take advantage of every opportunity to get fresh eyes on the property. The form allows visitors to categorise their feedback and add their comments.”*

CompassRock also intend to take photos through the Vantify Risk Manager mobile app and raise actions based on the feedback. The priority levels for these actions are predetermined according to the category selected as this is built into the system.



Health and Safety and compliance consolidation

From a health & safety and compliance perspective, CompassRock has found that Vantify Risk Manager has been incredibly effective in helping them consolidate and compartmentalise their processes. They've created a single point of truth that can be categorised by various areas such as fire safety, water hygiene and more. All documents are searchable, making it easy to find exactly what is needed at the time it is required.

Action Management

One of the key features CompassRock has found particularly useful is the ability to create actions, especially from fire risk assessments, surveys and inspections. This has helped them increase accountability within the organisation, ensuring the right people are responsible for following through on these actions.

Portfolio Snapshot

Vantify Risk Manager also provides CompassRock with a clear snapshot of their entire portfolio at a glance, which has proven to be incredibly valuable. They can quickly get an overview of all ongoing tasks and actions across their sites, helping them prioritise and manage their workload more effectively.



vantify RISK MANAGER

Dashboard
Reporting
Fire
Properties
Documents
Visits
Actions
Asbestos
Incidents
Supply Chain
Permit
Inspection Forms
Library
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Administration
Contact Us

Properties

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View

PG004
Carlton Retail Park
London Holdings Ltd
View

PG004-1
Carlton Retail Park - Unit a
London Holdings Ltd
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PG004-3
Carlton Retail Park - Unit c
London Holdings Ltd
View

PG007
Edmunds Square Shopping Centre
Capital Investors
View

PG005
Imperial Building
Norfolk Pension Fund
View

PG001
Victoria Shopping Centre
Capital Investors
View

PG002
York Place
Capital Investors
View

Parsons Green

Privacy Policy | Username: LeighWalker | Profile: Meridian Super User | Client: Parsons Green | Portfolio: All Portfolios | Logged On: 15:19 | Version: 6.44.0

Key Functionalities

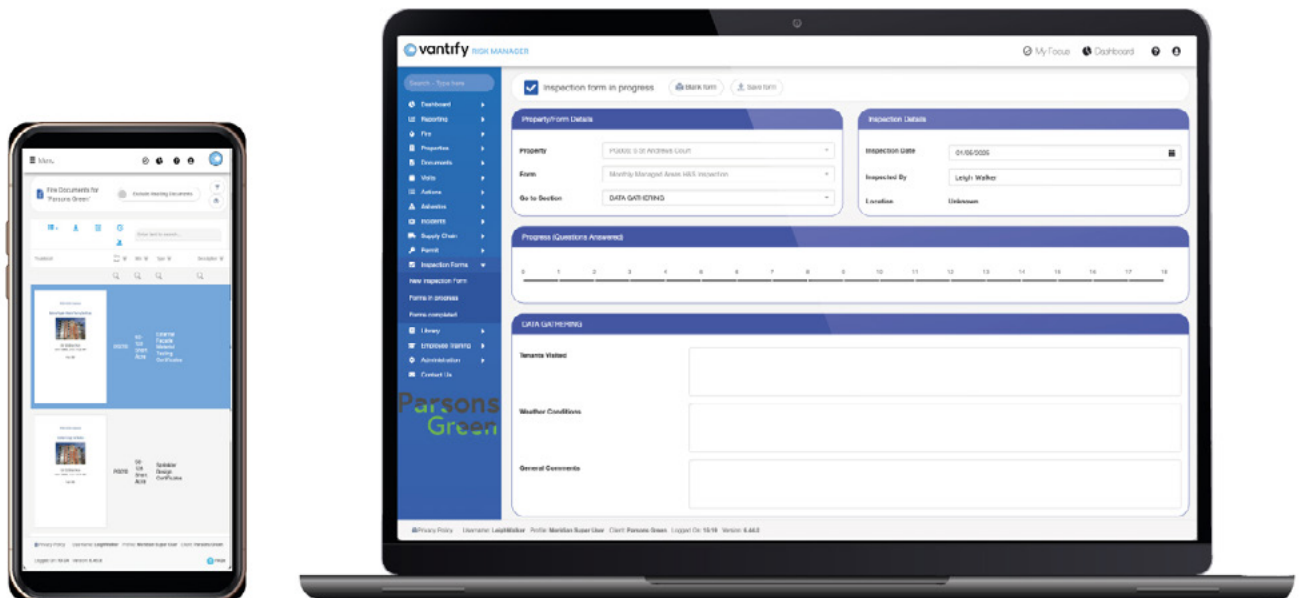


The top functionalities CompassRock highlights within the system are:

1. **Inspection forms:** The ability to create customised inspection forms for various needs.
2. **Action creation:** Creating actions based on inspections and surveys has been a critical feature.
3. **Document management:** Vantify Risk Manager allows them to house both internal and external documents, such as risk assessments, all in one place.

Incident Reporting

The final feature CompassRock appreciates is the incident reporting function. The ability to create an online incident log has been incredibly helpful. When an incident is logged on-site, it is immediately distributed to the relevant corporate contacts, allowing them to provide quick support to the site team if needed. They can also notify any external stakeholders who need to be aware of the incident, ensuring effective communication and a swift response.

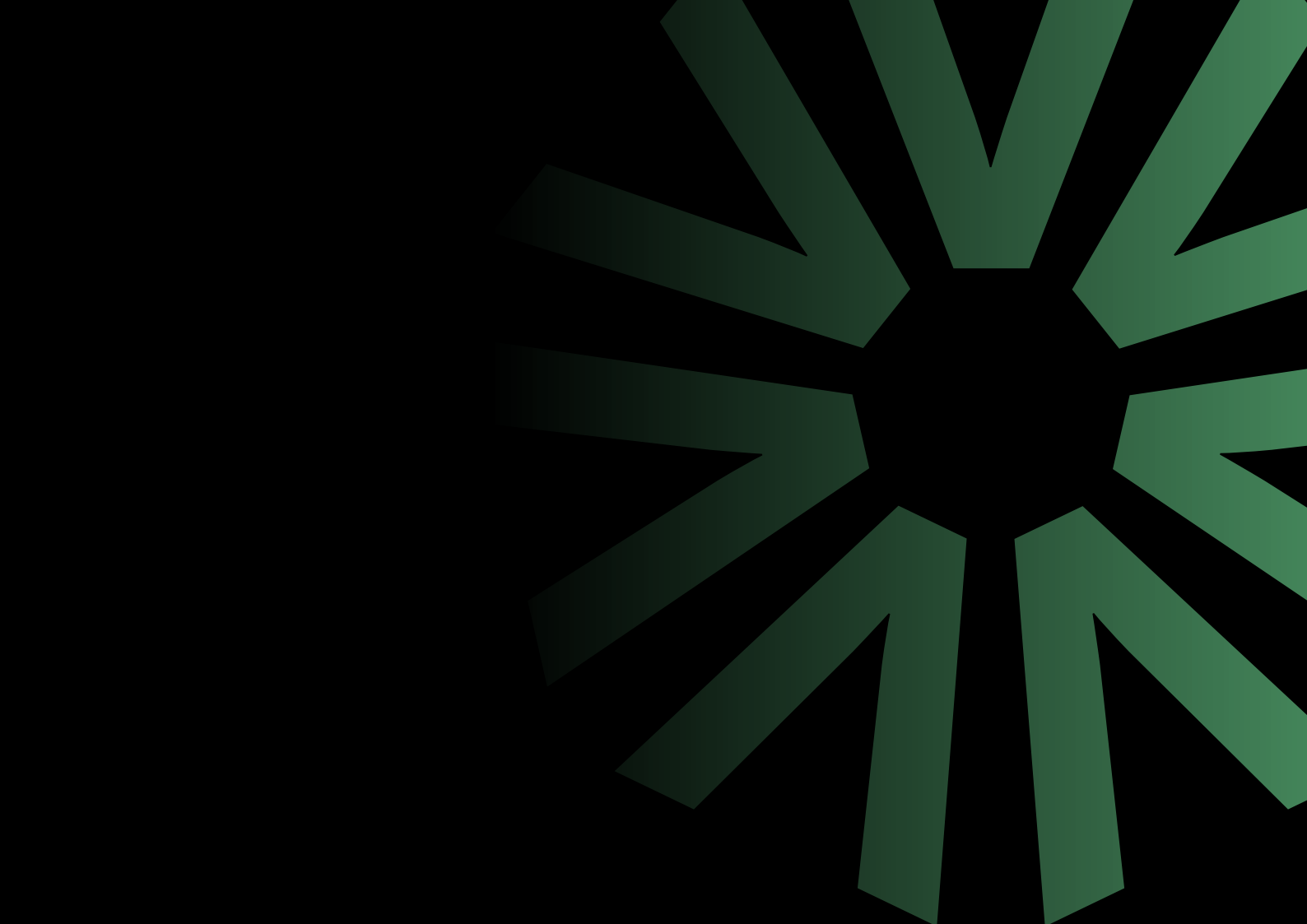


Overall, CompassRock is highly satisfied with their experience using Vantify Risk Manager and looks forward to maximising its benefits moving forward.



Are you facing similar challenges in managing compliance, safety and operational standards as CompassRock?

Invest in Vantify Risk Manager today!



Discuss your needs today

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William Martin, Meridian, Prosure360, and Elogs have joined forces to create Vantify® - our unified ecosystem that provides a single vantage point for compliance and risk management.

