Proficient™

What is Proficient All About?

Summary

Proficient takes a business-focused approach to information management for property professionals. Leveraging approaches taken by big business, a Proficient Project incorporates consulting services, specially designed software (Proficient Software) and professional advice to help valuation firms of all sizes be more efficient through streamlined processes, create better output through the smarter use of technology and become more profitable as a result.

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Proficient™

Supporting Your Professional Experience

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FileMaker.
BUSINESS ALLIANCE

FileMaker.
CERTIFIED DEVELOPER

AUSTRALIAN
COMPUTER
SOCIETY
SENIOR MEMBER

COVER OF
EXCELLENCE®

Proficient

Proficient and Proficient Software have been **independently conceived and developed**. Proficient and System are **designed with and for valuers** and are owned and maintained by an independent Australian business that **does not belong to any valuation firm, bank or finance company**.

A Proficient Project is most relevant to firms who have **specialised valuation expertise** and are looking to enhance the level of quality in their businesses whilst at the same time reducing costs. A Proficient Project adds tremendous value to your organisation!

 Best possible value from staff

 Consistency of output, faster results

 Smooth running systems, support

 Ownership of knowledge, lower risk

 Satisfied clients, repeat business

... and an improved bottom line!

How does a Proficient Project work?

A Proficient Project for your business combines a style of consulting and technology installation usually done by bigger businesses. A **business-focused approach** leads to dramatic **improvements in the way you work**, the way you handle information, the output of your staff, the quality of your reports, your risk exposure **and increase the amount of money you make**.

A Proficient Project is specifically designed to help you to **build "knowledge capital" in your business**, thereby **adding to its value**.

With an emphasis on **planning**, **streamlined procedures**, and **technology that's relevant to your business** a Proficient Project delivers results in weeks.
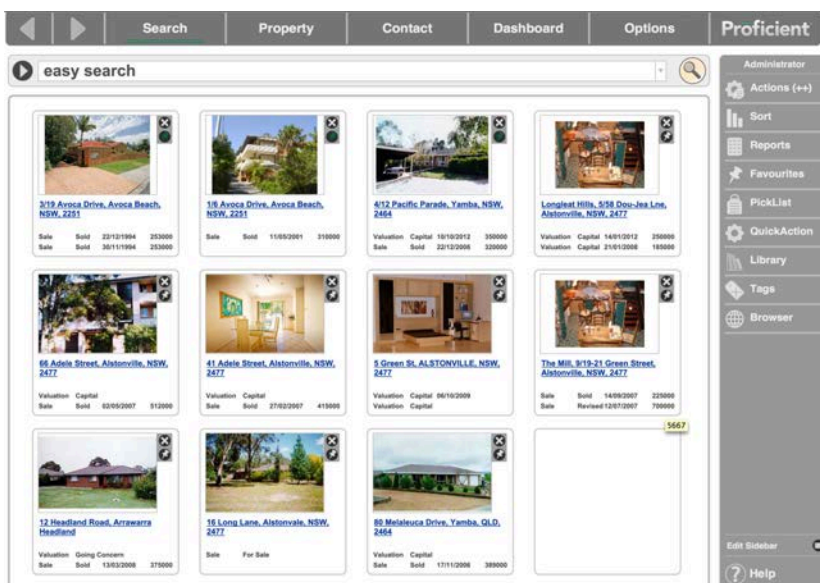
Proficient Software

Proficient Software headlines on **keeping all your report related information in one place** for consistent, firm-wide access, reducing production time and **reducing risk**.

It also includes **business automation features** to **improve consistency of working**. Proficient Software continues to be **regularly updated** to take **advantages of technological advancement**.

How Will a Proficient Project Help My Organisation?

A Proficient Project requires the combination of **Planning**, **Process Optimisation**, **Software** (**Proficient Software**), **Data Preparation** and **Training**.

Planning develops an overview of your organisation as a whole. It also helps to create a basis for answering questions that will arise during your Proficient Project.

Process Optimisation starts with the documentation of your existing ways of working. This exercise will help identify where there are instances of inefficient practice, double-handling or duplication of effort in the way you are currently working. Subsequent reviews of these working practices will inform streamlining which can then be achieved by retraining, leveraging the power of Proficient Software and existing or custom software tools.

Proficient Software includes components designed specifically to automate repetitive tasks, allow your organisation to build, personalise, store and re-use knowledge as well as take advantage of a more fluid way of working.

Data Preparation is designed to determine how to get as much of the existing important information that your Organisation is storing using Proficient Software, so staff can "hit the ground running" and the benefits of Process Optimisation and the power of Proficient Software can be profited from straight away.

Training makes sure everyone gets proper orientation and benefits from new ways of working and Proficient Software.

There are additional **options** available, depending on the needs of your organisation. These include **Advanced Training, Data Migration, Customisation and Advice.**

Data Migration brings the information your Organisation has already stored into Proficient Software. This can be Property data (including PropertyPro), Sales information, existing files and documents (both electronic and paper), and more, so that users are working with familiar information from day one.

Customisation allows the setup of Custom Forms that are specific to your Organisation, and applications to support unique business needs and allow market differentiation that has been achieved to continue.

Advice can include business planning, budgeting for and management of IT and telecommunications to help improve business direction and reduce your business costs.

Advanced Training covers more detailed setup and configuration of Proficient Software including setting up Actions, Triggers and Templates, setting up and using Knowledge Management features to further improve the benefits of using Proficient Software.

*Most Proficient Projects include **Planning, Process Optimisation, Proficient Software** and **Training**, plus a combination of **options**. For detailed information, please request a Proficient Project Implementation Menu.*

What Does A Proficient Project Cost?

The following example shows the cost of a Proficient Project for a 5-person Valuation firm. In general terms, the cost per person *decreases* as the size of the firm *increases* because the major professional services components do not increase proportionally with firm size.

Size/Cost Period	Included Components	Cost
3 Valuers 2 Support Staff 36 Months	Database Software Planning and Process Proficient Software Data Preparation Introductory Training Maintenance	from around $20 each user each week ... probably less than your phone costs!

Proficient is **designed to be affordable to the majority of valuation firms** – those that have less than 30 valuers and staff. Naturally, the cost will vary with the size of your business and the options you choose for your Proficient Project.

A Proficient Project can include **advice relating to budgeting** for technology spending, and ensuring that it is in line with other business costs.

What can Proficient Software Do?

Proficient Software has been designed to support the aims of Proficient.

Designed to be as consistent and usable as possible, Proficient Software **saves time** (and therefore **saves money**) in a property professional's practice.

Profiting from information by **finding** it quickly, **tracking** it and **reusing** it are pivotal to Proficient Software's features.

A selection of Proficient Software features are detailed below.

Improve **Staff** working practice

To achieve consistency through **Process**

Computer systems that support business

Better **Indemnity**

... and more profit!

Enhanced **Client** service

*Proficient Software Helps You to Find Things Quickly*

Easily find information relating to valuations, sales or other information you have stored. The **Recent Properties** screen (shown earlier in this document) automatically shows the Properties that you have viewed most recently and most often. You can "pin" a Property to this screen to keep it there.
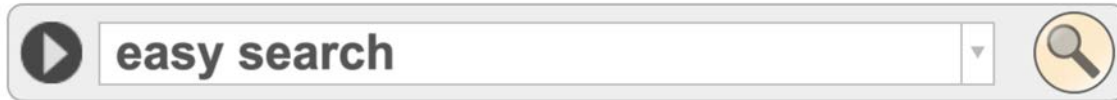
You can also do a "Google-style" search through Property details from this screen.
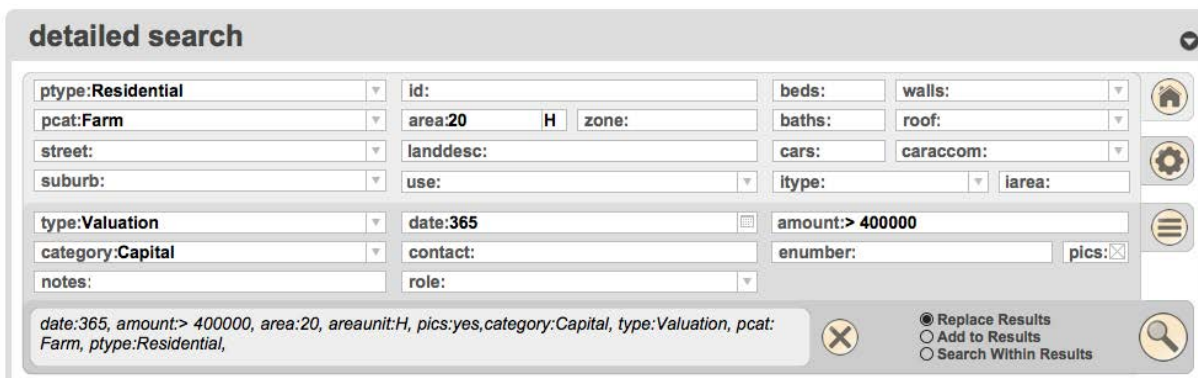
Detailed Search allows more granular searches based on multiple criteria. You can **Save Searches** for fast recall later on, or to add to the instant overview on your **Dashboard.** You can run reports of any search results.
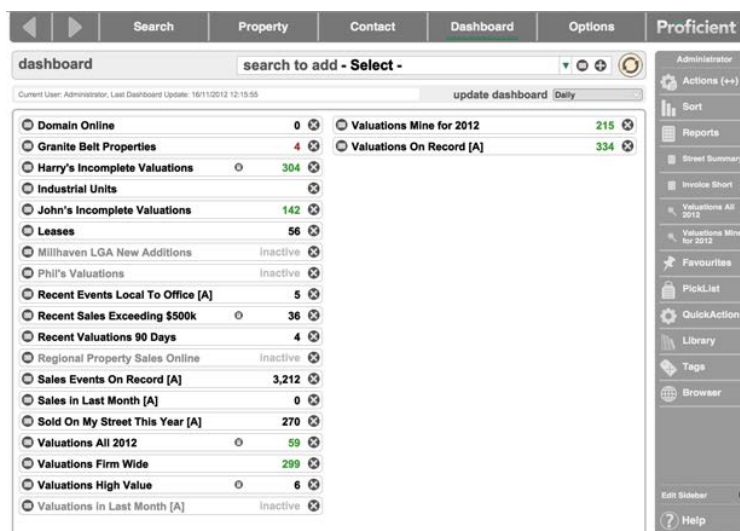

Dashboard allows you to instantly recall a search, see the number of results for multiple searches (including a visual indication of whether the number has changed), or display a report with the results of a search.

Clients will quickly be impressed by the amount of information you have at your fingertips!

Proficient Software *Looks After All Your Information*

Proficient Software provides a single point of access for any and all information relating to a particular property or job. It does this by allowing you to "**attach**" documents and pictures to jobs, and quickly view them again. Proficient Software can handle just about any type of image or document you're likely to encounter.
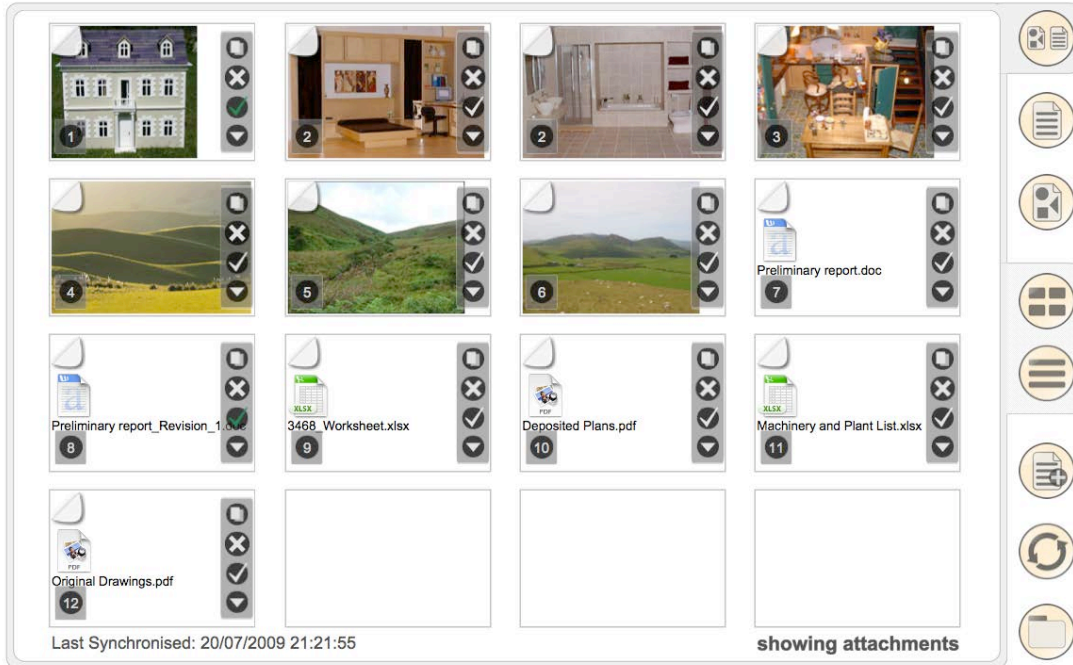
From within Proficient Software itself, you can make notes, re-order, open, and print documents and images. You can even copy images that are optimised for use in Word documents to help keep their size down. All the filing is taken care of for you.

With Proficient Software's advanced automation features ("**Actions**"), you can even start documents based on your own **Templates**, create **Revisions** of documents and direct e mail documents to contacts without ever leaving the job information.
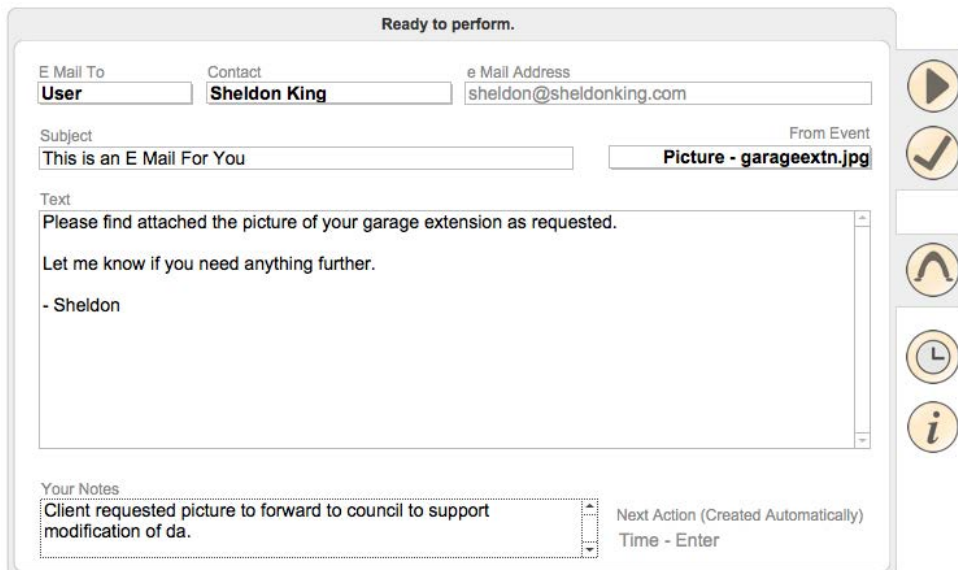
Proficient Software has an Easy Property Overview

Proficient Software's **Property Overview Screen** has been carefully designed to give you an at-a-glance view of a property, including pictures you've collected, documents you've generated and the things that have happened in relation to the property (for example sales, valuations, observations made, etc). Proficient Software calls these occurrences "**Events**."

From the **Property Overview Screen**, it's easy to view **Attachments**, see more **Event Detail** about a sale or valuation **Event**, or look for more information about the property itself.

You can also do an instant search for properties with similar characteristics or that are in the same neighbourhood, print a specially formatted **Property Information Sheet** or add a sale or new valuation to the property.

Property address and identification is maintained automatically by Proficient Software, ensuring that you are always using up-to-date details.

Proficient Software features Custom Forms

Proficient Software takes a unique approach to form-filling. The included **PropertyPro**-style form looks much like the finished result, but it's actually collecting information directly into your database as you work. It is designed to be filled in as quickly and efficiently as possible.

It includes smart time-saving features including the ability to connect existing sales for market evidence purposes and re-use the relevant comments, a secure sign-off without a signature, and an automated way of finalising, creating a PDF, attaching the final report and sending it to your client with just one click.

Additional **Custom Forms** are included with Proficient Software, and as the name suggests, you can commission forms that are specific to your business.

Custom forms are started using Proficient Software's advanced automation features ("**Actions**"), which also allows **Templates** (such as Word documents or Excel spreadsheets) to be set up for automatic attaching to Events.

Proficient Software Includes Sales Imports

Proficient Software has the ability to **Import Sales** information. This means that you can gather and annotate sales information from external sources.
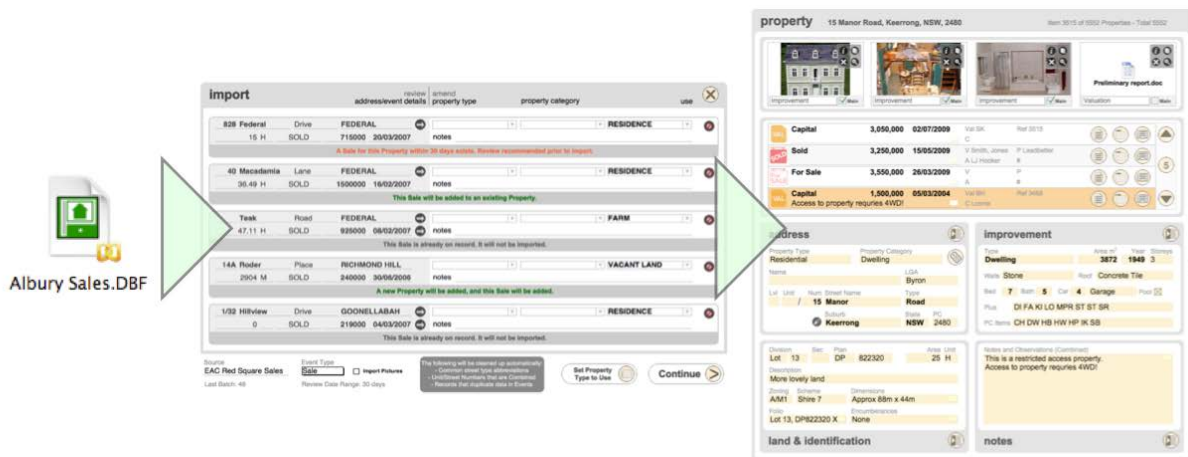
1 Export Data   **2** Import to Proficient Software   **3** Go To Lunch

Importing is a three-step process. Proficient Software can import sales information from services such as the EAC Red Square, and can be customised to import sales from other sources such as local council records.

Depending on the source of the information, Proficient Software can even import pictures with your sales!

One of the options that a Proficient Project offers is a "**Sales QuickStart**" which lets you hit the ground running with a Proficient Software already populated with sales information relevant to your area.

Proficient Software Saves Time Through Automation

One of the most powerful features of Proficient Software is automation using "**Actions.**"

Action Templates

Action Pack
Attachment
Call
Command (Search)
Custom Form
Detail (Event)
E Mail
Event Create
Memo
Stop Actions
Template
Time

Designed to get every day tasks done more quickly and consistently, Proficient Software allows the creation and customisation of "**Actions**" based on pre-defined templates that cover tasks such as sending e mails, making calls, writing memos, recording time and running searches.

These "**Actions**" can be called at any time for any **Event**, they can be connected together to create workflow ("**Action Packs**") and can also be triggered automatically and from other programs or systems.
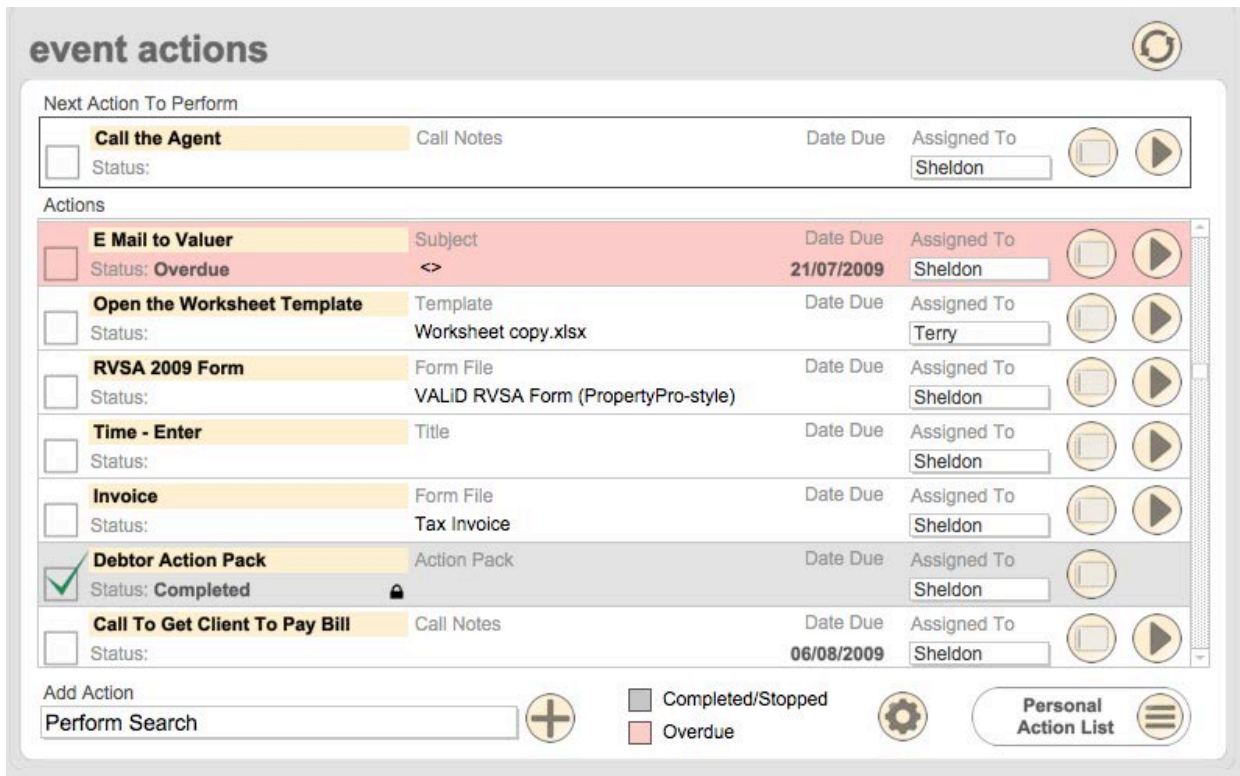
Each user can access their **Personal Action List** where actions that are waiting for them to perform are listed and can be started or edited.

A Proficient Project in Your Firm

- Get Started

Planning
Laying a solid foundation so that Project decisions are made in keeping with your aims.

Process Optimisation
Streamline procedures to get everyone working more effectively.

Data Preparation
Reviewing existing information to see how it can be best used moving forward.

Proficient Software
Providing, installing and setting up systems to support your work.

Introductory Training
To help you find your feet and get you started.

- Get More

Customisation
Creation of functions unique to your firm or way of working. Can include Custom Forms, data converters (to import information regularly from other sources) or even whole programs.

Advanced Training and Modules
Learning how to setup and use Proficient Software's advanced searching, automation, reporting and Knowledge Management facilities.

Sales QuickStart
Hit the ground running with an import of your choice of sales data.

Bring In Data From Other Systems
Bring in information from other systems, including PropertyPro, so you're working with familiar information from day one. Bring in existing documents and/or pictures you have saved during the creation of previous reports.

Advice
Including business planning, budgeting and IT management.

- Get Acquainted

For further information about Proficient and Proficient Software, please contact:

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